City of Tucson
Department of Transportation
Public Transportation Program Peer Review
October 31-November 1, 2013

Presented by

Arizona Transit Association

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Executive Summary

This report is provided to city of Tucson's Transportation Department focusing on a review of the city's Public Transportation program, including internal city services and contracted services of Sun Tran, Sun Van, and Sun Link.

At the request of city staff, The Arizona Transit Association organized a peer review team (PRT) to address three primary areas of review as requested by city staff:

- Ridership
- Cost control methodology
- Strategies for increasing system revenue

The PRT included transit professionals representing nearly 250 years of combined industry service. They are:

- Rick Simonetta, Burns Group (Team Leader), Scottsdale, Az
- Bruce Abel, Denver Regional Transportation District
- Reed Caldwell, North County Transit District, Oceanside, Ca
- Paul Jablonski, San Diego Metropolitan Transit District
- Dick Ruddell, The T, Fort Worth, Tx
- Carl Woodby, Capitol Metro, Austin, Tx
- Jim Dickey, AzTA (Facilitator)

The PRT provided input and analysis of more than twenty document sets as part of a preliminary desktop effort. The PRT met in Tucson on October 30-November 1, 2013 for an on-site review of programs and facilities, and interview of more than 20 professional staff. This written report identifies through assessment a list of recommendations in four categories.

1. Comprehensive Operational Analysis (COA):
    a. The evaluation of service performance should be an on-going process, be public, and incorporated into the regular work plan, to be reviewed in a routine and ongoing basis;
    b. The COA should be the basis for a recommended policy on service standards.
2. ADA and Para-Transit Services:
    a. Develop ADA service area and standards with strict adherence to ADA requirements;
    b. Address trips exceeding ADA requirements by charging premium fares and by lowering trip costs;
    c. Identify transportation options and/or alternatives for ADA trips exceeding ADA requirements;
    d. Eliminate duplication of ADA service;
    e. Establish paratransit fares appropriate to cost per trip;
    f. Eliminate/mitigate low income fares disparity;
    g. Expand utilization/enforcement of conditional eligibility;
    h. Investigate possibility of combination of call centers between fixed route and paratransit;
    i. Investigate free rides on fixed route for ADA eligible;
    j. Utilize turn/by/turn software application solutions;
    k. Purchase of ParaCutter software;
    l. Commission On Disability Issues (CODI) meetings should be regularly/routinely scheduled.
    m. Move the ADA eligibility location from its current location

n. Purchase smaller vehicles for Para-Transit services.
o. Utilize a broker for ambulatory passengers.

3. Contracting Methodology/Ops and Maintenance:
    a. Consider an analysis of turn-key service contract versus transit management contract;
    b. Address pension obligations and impacts and labor issues as part of the analysis;
    c. Realize that it is unlikely to undertake an alternative contracting methodology in the near term;
    d. Allow the Sun Link contract to mature before any change on contracting methodology is made;
    e. Combine related support services between rail/bus/para-transit if costs savings can be achieved;
    f. Sun Link preparations appear appropriate;
    g. Prioritize filling the Transit Services Administration.
4. Fares:
    a. Do a local customer/market survey to determine customer preference regarding fare changes versus service reductions;
    b. Identify a preferred strategy to raise farebox recovery ratio by establishing a base fare for all services; eliminate transfers to minimize abuse and promote use of day passes; formulize fare process for discount fares; and make regular adjustments to base fare on 2-3 year schedule;
    c. Improve the low income fare process by completing a peer analysis, overhauling the self-certification process; verifying referrals, limiting the length of the program for each user; move the risk of distribution of fare instruments to social service/other agencies.

As part of this process, the PRT noted the following which supports current service delivery and the peer review process:

- It was apparent that all levels of staff at the City, PAG/RTA, and Contracted staff at Sun Tran, Sun Van, and Sun Link are focused on providing the best possible services within the direction and constraint of current resources.
- The system is comprehensively reported in a data-driven methodology that is an excellent resource for planning, marketing, and service delivery.
- It was clear that there is an excellent working relationship between the agencies and with Contracted staff. Staff at all levels work together and create a combined resource for excellent service delivery
- Key staff members at every level provided and allowed for a comprehensive analysis in a very short period of time.
- Staff at all levels provided truthful and forthright information and was willing to discuss current methodologies and alternatives.
- The PRT was impressed with the caliber of staff at all levels, and found their approach professional, informed, and dedicated
- Staff presentations at all levels were well thought and prepared, and addressed the pertinent issues relative to the peer review.

The Peer Review Team submits this comprehensive report as a result of their systematic and detailed review so that the City can consider these recommendations supported by staff review and analysis.

Introduction

The City of Tucson Pubic Transportation Department requested that the Arizona Transit Association (AzTA) host a peer review of the city's public transportation services in the fall, 2013. The request was made in order for city staff to provide peer analysis-based solutions in three primary focus areas related to the performance and operation of the Sun Tran, Sun Van, and Sun Link systems.

City staff asked to assemble the team keeping in mind three primary focus areas:

- Ridership
- Cost control methodology
- Strategies for increasing system revenue

City staff identified recent, current, and future issues affecting service delivery, costs of service, revenue generation, and related performance issues that needed to be reviewed in order to make an informed recommendation to City Council. Coupled with a Comprehensive Operations Analysis and discussions surrounding fares, fare policy, and other revenue generation options (underway), the peer review could provide significant direction for a host of recommendations.

With those goals clearly defined, AzTA assisted in the identification of key team members qualified to address the focus areas based upon their background, skills, and experiences.

Scoping of the process began in summer, 2013, with the combined input of Association, City, and Contractor staffs in order to identify key issues. Working with City staff, AzTA made a recommendation on potential peer members whose qualifications and background would match with city objectives and be able to participate in the timeframe required.

Peer Review Team

Misters Caldwell, Simonetta, Woodby, Jablonski, Ruddell, and Abel

AzTA contacted potential team members to identify the program goals and solicit their participation. Each of the members contacted enthusiastically offered to be a part of the team. The group was facilitated by Jim Dickey, AzTA. Those Peer Review Team (PRT) members include:

- Rick Simonetta, Burns Group (Team Leader), Scottsdale, Az
- Bruce Abel, Denver Regional Transportation District
- Reed Caldwell, North County Transit District, Oceanside, Ca
- Paul Jablonski, San Diego Metropolitan Transit District
- Dick Ruddell, The T, Fort Worth, Tx
- Carl Woodby, Capitol Metro, Austin, Tx

(Bios for each team member are part of Appendix A of this report).

In combination the PRT represents nearly 250 years of public transportation experience, including CEOs, national industry leadership, and process specialists. In part, the team was chosen based upon their qualifications and the peer review on-site program focused on their personal strengths.

A variety of city of Tucson, PAG/RTA, Sun Tran, Sun Van, and Sun Link staff were part of the overall peer review process. This final report will address their participation as part of the applicable sections of the report.

Peer Review Team Process

Once the PRT was formed, AzTA coordinated several steps to prepare the team ahead of the on-site process. Those steps included arranging all travel logistics, working with city staff on schedule development, identification of materials for review, and coordinating all staff participation, site visits, and presentations. These efforts ensured the proper use of time for the PRT while on site.

As identified by city staff, the PRT could focus on the primary objectives:

- Ridership
- Cost control methodology
- Strategies for increasing system revenue

The PRT schedule was developed to address those primary objectives throughout the peer review process in order to accurately assess a variety of topical areas and provide recommendations based upon those assessments. As a result, a variety of specific and related topics were discussed. Those discussions provided context and background to meet the goals of the peer review; but additionally, allowed the peer review team to provide feedback to city staff to supplement the overall program objectives.

The PRT process included three major steps:

1. Desk Review of requested materials ahead of the on-site review (September-October, 2013)
2. On-Site Review (October 30-November 1, 2013)
3. Report Generation (November-December, 2013)

A brief discussion of each activity follows:

Document Desk Review: The PRT was provided incredible resources ahead of the on-site visit. Documents in eight different categories, including data and reporting, contracts, plans, organizational charts, and associated materials across all modes, including bus, para-transit, and rail operations, were reviewed ahead of the on-site process. This report is accompanied by a binder exceeding 500 pages of printed materials and an electronic record of all materials, reports and presentations to document the PRT process and conclusions. Appendix B provides a listing of these documents.

Staff from all areas provided thorough analysis of documentation, and was available for questions and feedback, produced on-site additional documentation as requested, and supported the PRT in every way possible.

On-Site Review: The PRT arrived on the afternoon of October 30, and began immediately to complete the objectives of the effort, starting with a working dinner including a presentation from Carlos de Leon, city of Tucson.

The PRT reconvened on October 31 with a working session with staff from the City, PAG/RTA, Sun Van, Sun Tran, and Sun Link (combined Transit Management (TM) staff) that included presentations on Tucson's transportation history, relationships and work of the PAG/RTA, and detailed presentations across all modes of service in the region.

Sun Link Rail Car Inspection

The PRT then took part in a facility tour that included Sun Link alignment, Sun Van and Sun Tran Facilities. Over a working lunch at the Sun Tran NW Facility, the team addressed a variety of issues in response to facility tours, and then for the afternoon broke up into specific areas of administration, fixed route operations, maintenance, and para-transit program operations. The team then re-united at the Sun Link maintenance/operations facility for a tour and vehicle inspection before meeting to assimilate the day's activities and information and to formulate any requests for information for the next day's work.

Over a working dinner, Carlos de Leon made a presentation to the PRT about current challenges and opportunities within the city and region. The evening ended with a night time tour of Ronstadt Transit Center and transit oriented development (TOD) in the downtown area.

Ronstadt Transit Center

On Friday, November 1, the PRT met again with City, MPO, and TM staff across all modes to address requests made from the day before on three specific areas including draft outcomes of the COA, discussion of regional and para-transit fares, and the para-transit program in general. Following that detailed meeting, the PRT met to develop an outline of reporting issues.

Over a working lunch, Rick Simonetta (PRT) made a presentation to City, MPO, and Operations Staff including PRT feedback on discussions as outlined in this report, and draft recommendations in four areas to meet the City's objectives of the overall program.

During the course of the on-site work, the PRT met with the following staff of city, regional and contactor organizations who were involved in the PRT review process.

Staff, City of Tucson
Albert Elias, Assistant City Manager
Daryl Cole, Transportation Director
Carlos de Leon, Deputy Transportation Director
John Zukas, Transit Coordinator

Staff, Regional Transportation Authority
Jeremy Papuga, Director of Transit Services

Transit Management Staff, Sun Tran/Sun Van
Kate Riley, General Manager
Mary McLain, Assistant General Manager
Jeff Rock, Assistant General Manager
Sabrina Herrera, Assistant General Manager
Rhonda Lugo, Finance Director
James Gleason, Maintenance Manager
George Bruegger, Assistant Ops Manager
Anabel Teran, Road Supervisor/Dispatcher
Bob McGee, Scheduling Manager
CJ Bright, Transit Planner, Veolia Transportation
Gilbert Gherna, Risk Management Director (Tour and Questions)
Michele Joseph, Marketing Director (Tour and Questions)
Michelle Clark, Customer Satisfaction Director (Tour and Questions)
Kevin Faulkner, Procurement Director/Special Projects (Tour and Questions)
Maria O'Grady, Scheduling Supervisor, Sun Van
(Dick Ruddell also visited Special Services Offices and spoke with Eligibility Staff)

Transit Management Staff, Sun Link
Steve Bethel, General Manager
Cleve Cleveland, Operations Manager
John Kortekaas, Maintenance Manager

Peer Review Team Final Working Session

Report Generation: To complete the PRT process, this report represents a comprehensive review of four areas of emphasis to meet the overall City objectives. The report was drafted through the consultation of all team members and represents their combined efforts and recommendations.

Peer Review Team Assessments and Recommendations

The PRT was in complete agreement on several additional items worthy of note in this report:

- Focused staff efforts: It was apparent that all levels of staff at the City, PAG/RTA, and Contracted staff at Sun Tran, Sun Van, and Sun Link are focused on providing the best possible services within the direction and constraint of current resources.
- Excellent measurement basis: The system is comprehensively reported in a data-driven methodology that is an excellent resource for planning, marketing, and service delivery.
- Relationships between/within professional staff. It was clear that there is an excellent working relationship between the agencies and with Contracted staff. Staff at all levels work together and create a combined resource for excellent service delivery
- Comprehensive review, right people: For the PRT effort, access to key staff members at every level was provided and allowed for a comprehensive analysis in a very short period of time.
- Open dialogue, open/honest/conversation and discussions: The PRT found that staff at all levels provided truthful and forthright information and were willing to discuss current methodologies and alternatives.
- Depth of staff, city, PAG/RTA, at all levels, Contractor management teams: The PRT was impressed with the caliber of staff at all levels, and found their approach professional, informed, and dedicated
- Presentations: Staff presentations at all levels were well thought-out and prepared, and addressed the pertinent issues relative to the peer review.

With the aforementioned, the Peer Review Team draws the following conclusions and makes the following recommendations in the four areas:

1. Comprehensive Operational Analysis
2. ADA and Para-Transit Services
3. Contracting Methodology/Ops and Maintenance
4. Fares

Each area focuses on a level of analysis that supports certain assumptions and conclusions. From those, the PRT then provides a list of potential recommendations for consideration and implementation.

<u>Comprehensive Operational Analysis (COA):</u> Although not complete at the time of this review, the PRT was briefed on progress to date of the COA effort undertaken as part of the value added services by Veolia's corporate staff. Staff identified key goals of the COA and preliminary assessments. The PRT has vast experience with the COA process, and developed the following assessments and recommendations:

Assessment:

a. Completing the COA was the right decision, as a comprehensive analysis of the system was needed. The process is on target as well. Completing a COA might have been better to do with an outside consultant—but the process as described was consistent with methodology of an outside firm;
b. Analysis of origins/destinations, route segmentation, alignment, profile, ridership, productivity, service levels, costs metrics, and run cutting process is consistent with any COA. The PRT is aware that there will be an important add-on for para-transit;
c. The COA may help address target savings goals;

d. The COA is well overdue, and it should be used to provide technical recommendations to what often becomes a politicized process of service design;
e. Current metrics seem to indicate efficient service provider cost/per mile.

Recommendations:

a. The evaluation of service performance should be an on-going process, needs to be public, should be incorporated into the regular work plan, and reviewed in a routine and on-going basis.
b. The COA should be the basis for a recommended policy on service standards based upon metrics.

ADA: The Americans with Disabilities Act (ADA) has specific minimum requirements for implementation and compliance. As a priority effort of the PRT, it reviewed the current Sun Van program as operated within the Tucson service area, comparing it with like programs in other communities and also as a direct comparison to ADA regulations. Site visits to Sun Van and the ADA eligibility certification office were part of this effort. It should be noted that many U.S. cities are facing continued increasing demand on their paratransit services due to aging populations and increased awareness of paratransit services. Key PRT members focused on this area. As a result, the PRT makes the following assessments and recommendations:

Assessment:

a. The ADA service area far exceeds basic ADA requirement; it exceeds service levels of peer cities; and there is a high number of trips for size of system;
b. There is a low revenue per trip with only a 4% farebox recovery;
c. 21% of system-wide transit funds go to paratransit for approximately 2.2% of riders (all costs/all revenues related to Sun Van);
d. Key questions should be: should the city of Tucson provide the excess services, and if so, how much should it cost? Current service offering parameters stimulate overuse of paratransit program.

Recommendations:

a. Develop service area standards with strict adherence to ADA requirements for service provision in a corridor extending ¾ mile on each side of non-commuter fixed route service and with a span of service that corresponds to each fixed route. There are many trips provided by SunVan which fall outside the ADA requirements, including areas of the city outside of the 3/4 mile boundary around the fixed routes, and also outside of the times and days of fixed route service within each fixed route area;
b. Address trips exceeding ADA requirements by charging premium fares and by lowering trip costs, through a lower cost provider and/or charging a premium fare. While SunVan services to these areas and times could still be provided, they should command a premium fare;
c. Identify transportation options and/or alternatives for ADA trips exceeding requirement;
d. Elimination of duplication of service provision in all geographic areas where there are multiple providers;
e. Paratransit fares need to be appropriate to cost per trip;
f. Eliminate/mitigate low income fares disparity;
g. Expand utilization/enforcement of conditional eligibility. While the eligibility department does do conditional eligibility, some trips could be reduced by more fully utilizing the conditional eligibility;

h. Investigate possibility of combination of call centers between fixed route and paratransit (info and reservations). Combining SunVan Reservations Center and the SunTran Call Center by cross training the individuals in each center could offer significant efficiencies. While there are some constraints to doing this, the cost savings to be realized would justify an effort to implement this change;
i. Investigate free rides on fixed route for ADA eligible to stimulate use of fixed route services. Many cities have realized reduced demand on their paratransit services by implementing this approach. Strong controls have to accompany this approach to preclude abuse, but free rides on fixed route for SunVan eligible passengers can reduce SunVan trips;
j. Recommend turn/by/turn application solutions. This would improve the operation of the service and reduce incorrect routes or turns by SunVan drivers thus improving the efficiency of the service.
k. Recommend purchase of ParaCutter software. This product of would improve the efficiency of assigning SunVan drivers.
l. The Commission on Disability Issues (CODI) meetings should be regularly/routinely scheduled with appropriate staff levels to encourage community interactions. CODI is the only organization available for SunVan staff to meet regularly with outside disability groups and the SunVan manager needs to meet with these people on a regular basis to stay in touch with needs of the Tucson disability community;
m. Move the ADA eligibility location from its current location to segregate duties.
n. Smaller Vehicles could improve the efficiency. At present all of the SunVan vehicles are the same size, (25 to 30 foot cut-aways). Smaller vehicles have been ordered which should improve the efficiency of the operation. This should be continued or expanded.
o. Services for SunVan ambulatory passengers could be better handled by a brokerage program. With this, ambulatory passenger trips could be brokered to taxi cab providers or similar contractors. While there are provisions in the labor contract precluding subcontracting out SunVan work, this could be done by the City of Tucson without Veolia having to subcontract.

Contracting Methodology/Ops and Maintenance: The PRT was charged with reviewing the factors associated with current contracting methodology for Sun Tran/Sun Van, and with Sun Link. PRT members, having a varied and extensive background in both similar and dissimilar environments, brought significant experience in this area. As a result, along with significant desktop review materials, the PRT visited each of the major modal operations, met with front line staff, and discussed the relationships between contracted personnel, city, agency, and other groups as it relates to the overall efficient operation of transit services. Within this effort were detailed discussions with all entities about relationships, responsibilities, accountability and efficiencies. As a result, the PRT makes the following assessments and recommendations.

Assessment:

a. The Transit Management (TM) contract model appears to provide a cost effective means for transit service delivery when compared to peer cities:
b. The current TM contract houses necessary functions including marketing, service planning, scheduling/runcutting, specification development, procurement, finance/budget, IT, grant writing, and FTA compliance (Title VI), that typically are not provided in contracted out service delivery. These functions are necessary and must be maintained regardless of the service model, or how service is procured and delivered. The services may be provided directly by the city or through a modified management contract. It is important to recognize

the necessity of these functions when comparing service deliver procurement alternative costs. This could potentially translate into increases in costs.

c. TM staff seems very responsive to city and elected leadership;
d. TM staff acts as an arm of city staff, and seems to function like a city department.

Recommendations:

a. Complete an analysis of turn-key service contract versus transit management contract to determine most cost effective model for the City recognizing the numerous staff functions currently performed by the contract management team will need to be maintained either through the city or a modified management contract;
b. There are other substantive issues to address as part of the analysis including:
    i. Pension obligations and impacts.
    ii. Labor issues.
c. Realizing that the long lead time to conduct such a study and potentially transition roles to City staff makes it unlikely to undertake any transition in the near term;
d. Allow the Sun Link contract to mature before any change on contracting methodology is made;
e. Continue to combine related support services between rail/bus/para-transit in marketing, service coordination, etc., under one roof;
f. Sun Link preparations appear appropriate based upon facility, way, rail-cars, and operations;
g. Prioritize filling the Transit Services Administration with a person who has transit operations background to ensure proper contract oversight and guidance:
    i. As vacancies occur in city staff, each needs priority attention (based upon small size of staff;
    ii. Address department recommendations for additional staffing needs due to increased contracted services for rail operations and new FTA compliance requirements.

<u>Fares:</u> The PRT addressed the fare issue in relationship to current fare trends nationwide and the fare structure as applied for the service areas. PRT experience in fare policy and fare administration is extensive yet varied. The PRT spent considerable time understanding the background leading to the current transit fare system, and recognizes the challenges associated with identifying the proper fare levels, administration, and local environment that creates the combined system. The PRT also addressed other revenue considerations, including advertising, as part of its discussion. Detailed fare policy and administration questions and answers were provided. The PRT makes the following assessments and recommendations

Assessments:

a. Service delivery is cost effective, but revenue collections are low compared to peers, including a low farebox recovery;
b. The PRT compliments the City of Tucson on implementing Smart Card program
    i. It provides important data
    ii. It improves service planning
    iii. It improves passenger service

Recommendations:

a. Do a customer/market survey of current transit users to determine customer preference regarding fare increases to determine the best city strategy on fare program levels and application;
b. Identify a preferred strategy to raise farebox recovery ratio:
    i. Establish base fare for all services;
    ii. Eliminate transfers in lieu of a day pass;
    iii. Formulize fare process for discount fares:
        1. Establish discount as 50% of base for all discount fare categories;
        2. Establish the price for monthly passes using a formula of 21 days times 2 trips per day times the base fare and discounting the result by 20%;
        3. Reduced fare monthly passes should cost ½ the price of a regular monthly pass.
    iv. Make regular adjustments to base fare on 2-3 year cycle at some standard level, like CPI, but also keeping in mind customer convenience in terms of rounding fares to accommodate various realistic combinations of coins.
c. Low Income Fare program may be abused, as utilization suggests significant abuse. In order to improve the low income fare process:
    i. Complete a peer analysis focusing on similar systems in other communities;
    ii. Overhaul the self-certification process;
    iii. Verify referrals;
    iv. Limit the length of the program for each user from the current 1 year period;
    v. Move risk of distribution of fare instruments to social service/other agencies, by selling fare instruments to other agencies for distribution instead of direct distribution.

Summary

As with any organization and effort, the PRT found that the public transportation program in the Tucson region has both strengths and weaknesses, and decisions that may require further investigation.

Overall, the strengths can be summarized in several ways:

- Staff at all levels on the public and private sectors are competent and committed to providing excellent service within the guidelines and policies established;
- The system is rich with data and analysis;
- Facilities and capital equipment appear to meet service needs;
- There is a genuine effort to identify areas of need for improvement.

Program weaknesses in the system focus on four primary areas:

- Fares: Fare policy needs to be examined to address fairness and revenue goals;
- ADA Service Area: ADA-like service is available above and beyond the ADA requirements costs the system significant and disproportionate dedication of resources;
- Comprehensive Operational Analysis efforts should become a regular effort, becoming a key component in on-going system performance evaluation;
- Key city staff positions in oversight and performance need to be filled if vacant, with qualified personnel on a timely manner. Additional city staff may be necessary with the addition of new services (rail).

Finally, the PRT believes that the City's contracting method/model, whether the current management contract methodology, or some more comprehensive turn-key operations contract, should be considered only after a more thorough analysis of current roles, functions, and needs are completed. Recognizing the value that the current methodology brings in staffing and responsibilities, coupled with a variety of personnel, labor relations, and other factors, makes this decision one that requires more investigation. It is clear to the PRT that such an effort is not near term solution, and further, that the Sun Link services should have an opportunity to mature ahead of any change in contracting methodology.

The Peer Review Team submits this comprehensive report as a result of their systematic and detailed review so that the City can consider these recommendations supported by staff review and analysis.

Appendix A: Peer Review Team Biographies

Rick Simonetta (Team Lead)

Richard (Rick) Simonetta is the Rail & Transit Business Development Lead for the Burns Group. Mr. Simonetta is a transit industry veteran with 43 years of experience, 28 as the CEO of five transit systems, including MARTA in Atlanta, the seventh largest transit system in the U.S. While at MARTA he successfully led the organization in the planning and execution of transit services for the 1996 Summer Olympics, when MARTA transported 25 million passengers in 17 days. Prior to joining The Burns Group, he was the Vice President and National Director, High Speed Rail & Special Projects for the URS Corporation. Before joining URS, Rick was the CEO of Valley Metro Rail in Phoenix where he lead the effort to complete a 20-mile, $1.4B light rail line on-time and under budget. He is a former Chairman of the American Public Transportation Association, and President of State Transit Associations in Pennsylvania, Michigan, Ohio and Arizona. He is the recipient of several prestigious APTA awards, including Transit Manager of the Year in 1997, Best Overall Transit System, and two-time winner of the Best Hiring and Promotion of Minorities and Women. In 2013, Rick was inducted into the prestigious APTA Hall of Fame. He holds a Bachelors Degree in Urban and Regional Planning from Indiana University of Pennsylvania and a Masters of Regional Planning from Penn State University.

Bruce Abel

Bruce Abel is the Assistant General Manager for Bus Operations for the Regional Transportation District (RTD) in Denver, Colorado. In this capacity, Bruce is responsible for overseeing RTD's service planning activities as well as for overseeing all rubber tired services (fixed-route and paratransit) delivered by RTD and its contracted service providers. RTD currently provides approximately 50% of all of its rubber tired services through contracted service providers. These services are provided utilizing a fleet of approximately 1025 fixed route buses, 325 ADA paratransit vehicles, 50 general public demand response vehicles and 130+ vanpools. RTD provides approximately 2.6 million hours of fixed route service, 615,000 hours of ADA paratransit service and 100,000 hours of general public paratransit service annually. RTD currently carries approximately 100M passengers per year.

Bruce began his transit career in Winston-Salem, NC and has served in both public sector and private sector capacities during his career. He has worked in a variety of planning, marketing and general management capacities. He has worked with American Transit Corp. (ATC) and has also worked with DAVE Transportation Services. He has been with RTD since the fall of 2000. He earned his undergraduate degree from Wake Forest University in Winston-Salem, NC and his MBA from the University of North Carolina in Greensboro, NC.

Reed Caldwell

Reed Caldwell has over 30 years of government experience. He currently is Deputy General Manager at North County Transit District. Reed has thirteen years' experience in the transit industry. From 2000 to 2011 he was the Deputy Director at Phoenix and led the Operations Division where he directed fixed route bus transit service carrying over 35 million passengers annually. The Phoenix system provides transit service via a fleet of 525 low floor buses powered by either liquefied natural gas (LNG) and diesel.

Prior to Operations he was responsible for design, construction, and maintenance of all transit facilities. He led the design and construction of a new $40 million bus maintenance facility opening in 2008 to accommodate 250 buses. He also led the implementation of the City's new Bus Rapid Transit service with construction of six park-and-ride facilities. Reed managed the maintenance of all 13 transit facilities and 2,600 bus shelters.

Reed holds a degree in Civil Engineering from South Dakota School of Mines and Technology with graduate study work at Arizona State University and is a registered professional engineer in Arizona.

Paul Jablonski

In October 2003, Paul Jablonski was named Chief Executive Officer (CEO) of the Metropolitan Transit System (MTS). MTS provides rural and urban bus and rail services to much of San Diego County, with a jurisdictional area of 3,240 total square miles and an annual ridership of over 80 million. MTS was named the American Public Transportation Association's Outstanding Public Transit System in 2009.

Mr. Jablonski was previously CEO and General Manager of the Southwest Ohio Regional Transit Authority (SORTA) in Cincinnati, Ohio. He started his transit career in college at the University of Massachusetts - Amherst campus bus system. He has worked for the Capital District Transportation Authority in Albany, NY. He has served as Director of Operations for the Cleveland Public School System, as Senior Operations Consultant for ATE Management working for Dallas Area Rapid Transit, and as General Manager of the Merrimack Valley Regional Transit Authority outside of Boston. He also spent five years in Saudi Arabia in the 1980s starting up and operating Jeddah's first city bus system as its general manager.

Mr. Jablonski is a current Executive Committee member of the Board of the American Public Transportation Association (APTA) and past president of the Ohio Public Transit Association. He is immediate past Chairman of the California Transit Association, leading the 190-member association that includes all of California's largest urban transit operators, as well as dozens of agencies in suburban and rural areas. He is a graduate of the University of Massachusetts and pursued graduate studies at Rensselaer Polytechnic Institute

Dick Ruddell

Dick Ruddell is the President/Executive Director of the Fort Worth Transportation Authority (The T). The T has 150 buses in fixed route service and 30 vans used in MITS, paratransit service for the disabled and along with the Dallas Area Rapid Transit (DART), jointly operate the Trinity Railway Express (TRE).

Mr. Ruddell was born and raised in Wichita, Kansas. He received his bachelor's degree from Wichita State University with a major in Psychology. He also earned a Master of Business Administration and a Master of Urban Studies from Wichita State University.

Mr. Ruddell served as a lieutenant in the U.S. Army and earned a Bronze Star while serving in Vietnam. He worked for the Wichita Metropolitan Transit Authority for 12 years, served as General Manager of the Topeka Kansas Transit Authority for five years and as General Manager of the Toledo Area Regional Transit Authority in Toledo, Ohio for 14 years.

Mr. Ruddell is currently President of the South West Transit Association Board of Directors. He also serves on the Downtown Fort Worth, Inc., board, and the American Public Transportation Association and has been a Rotarian for over 20 years.

Dick and his wife, Sherry has a son and daughter and a grandson.

Carl Woodby

Carl Woodby has more than 30 years of experience as a maintenance professional. He has been with Capital Metropolitan Transportation Authority, Austin, Texas, from 2004 until present in roles as Senior Contract Performance Manager, where he is responsible for Quality Control programs for six separate contractors, bus procurements, and ITS implementation. He was also Director of Vehicle Maintenance, responsible for a fleet of over 500 vehicles, including 150 vehicles operated by three contracted providers. He has participated in labor negotiations, purchased buses and other vehicles, and developed maintenance training programs.

Prior to his service in Austin, he was with the Niagara Frontier Transportation Authority, Buffalo, NY, where he was Manager of Bus Maintenance and Equipment from August 2000 to January 2004. In Buffalo, he was responsible for the maintenance of over 375 vehicles in three operating garages.

At Trailways Commuter Transit (eventually purchased by First Transit), Dallas, Texas, he was the AGM/Maintenance for over 15 years. He was responsible for the start up and operation of a suburban bus service for the Dallas Area Rapid Transit. The fleet grew to approximately 300 buses and 100 paratransit vehicles. This location remained profitable throughout its15 year span. While there he also provided oversight for other ATE/Ryder/First Transit contract locations such as Foothills Transit, Houston Metro, and LADOT.

Carl began his career with the Ann Arbor Transportation Authority, Ann Arbor, MI, as Manager of Maintenance, from July 1980 to July 1985. There he was responsible for a fleet of approximately 90 buses.

Appendix B: Document Desk Review*

- City of Tucson Five Year Strategic Transit Plan
- Sun Tran/Sun Van Monthly/Annual Report
- Monthly Compliance Report
- Most Recent Triennial Review Report
- Fleet Management Plan
- Facilities and Equipment Maintenance Plan
- PAG Short Range Transit Plan
- Regional Org Charts
- Sun Tran-Sun Van Annual Report 2011
- Sun Tran-Sun Van Annual Report 2012
- Sun Tran-Sun Van Annual Report 2013
- Transit Management Contract: Sun Tran/Sun Van
- Transit Management Contract: Sun Link
- Transit Management RFP: Sun Tran/Sun Van
- Transit management RFP: Sun Link
- RTA Budget
- Sun Van Labor Agreement/Contract
- Proposed Fare Policy
- Low Income Fare Pricing Alternatives
- Sun Tran Labor Agreement/Contract

*Hard copy of all documents is presented with the written report version.
*Electronic copy of all documents is presented with the electronic report version.