



## INFORMATION ITEM

### Transportation Development Act FY 2019 – FY 2021 Triennial Performance Review

## STAFF REPRESENTATIVE

**Lisa Patton, Executive Director/VP, Finance and Budget**

## BACKGROUND

Long Beach Transit (LBT) receives Transportation Development Act (TDA) funding from the state Local Transportation Fund (LTf) each year. In Los Angeles County, these funds—which can be used for capital or operating purposes—are distributed according to the Formula Allocation Procedure (FAP) through the Los Angeles County Metropolitan Transportation Authority (Metro) in its capacity as the Regional Transportation Planning Agency (RTPA).

The California Department of Transportation (Caltrans) requires that each TDA fund recipient undergo a review of its public transit program on a triennial basis. LBT's review was conducted virtually, due to the COVID-19 pandemic, on December 7, 2021, covering the three-year period FY2019–FY2021, ending June 30, 2021. The final report was issued on May 20, 2022.

The Triennial Performance Review (TPR) is a tool for LBT to assess compliance with the TDA and includes five primary objectives:

1. Compliance with the California Public Utilities Code (PUC)
2. Verify data collection and reporting procedures as well as consistency of reporting
3. Evaluate improvements implemented subsequent to the prior TPR as well as progress toward adopted goals
4. Performance Trends which include summaries of performance indicators for the review period
5. Review functional areas and provide sound, constructive recommendations for improving the efficiency and functionality of the transit operator

Long Beach Transit met all compliance requirements with respect to PUC 99246. The agency was highly consistent in its reporting key financial and operating statistics among the various reporting agencies. Its management team provided timely submittals of various annual reports required by regional, state and federal regulating agencies.

LBT's data collection practices are supported by detailed written policies and procedures for revenue collections, fare media sales, farebox probing and vaulting, and revenue conveyance. It also uses an established automated system to collect non-financial operating data.



## Board Agenda Item No. 11

### June 23, 2022

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Long Beach Transit provided an immediate response to the pandemic threat and instituted protocols for employee safety, including on-site COVID testing and vaccination stations. The agency was also involved in coordinating best practices at the regional level, while monitoring its system's key performance indicators in order to minimize service inefficiencies and concentrate service where it was most needed. It also continued to make progress on its capital program, including technology upgrades and improvements to its passenger amenities.

The report recommended that LBT pursue clarification from Metro on the definition of a "local subsidy," as it relates to TPM reporting and subsequent calculations of farebox recovery ratios.

#### STAFF RECOMMENDATION

Not Applicable. Information Item

A handwritten signature in blue ink that reads "K. A. McDonald".

Kenneth A. McDonald  
President and Chief Executive Officer