Final Report | June 2026

City of Simi Valley

TDA Triennial Performance Audit for FY 2022/23, 2023/24, and 2024/25

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VCTC

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Chapter 1 | Executive Summary

In 2025, the Ventura County Transportation Commission (VCTC) selected Moore & Associates, Inc., to prepare Triennial Performance Audits of itself as the RTPA and the 10 transit operators to which it allocates TDA funding.

The California Public Utilities Code requires all recipients of Transit Development Act (TDA) Article 4 funding to undergo an independent performance audit on a three-year cycle in order to maintain funding eligibility. Audits of Article 8 recipients are encouraged.

The Triennial Performance Audit is designed to be an independent and objective evaluation of the City of Simi Valley as a public transit operator, providing operator management with information on the economy, efficiency, and effectiveness of its programs across the prior three fiscal years. In addition to assuring legislative and governing bodies (as well as the public) that resources are being economically and efficiently utilized, the Triennial Performance Audit fulfills the requirement of PUC Section 99246(a) that the RTPA designate an entity other than itself to conduct a performance audit of the activities of each operator to whom it allocates funds.

This chapter summarizes key findings and recommendations developed during the Triennial Performance Audit (TPA) of the City's public transit program for the period:

- Fiscal Year 2022/23,
- Fiscal Year 2023/24, and
- Fiscal Year 2024/25.

The City of Simi Valley, located in eastern Ventura County, provides public transit service consisting of three fixed routes and an ADA/senior Dial-A-Ride service within Simi Valley city limits. Route 10 also serves Moorpark College and the Chatsworth Metrolink Station. The service operates Monday through Saturday (excluding designated holidays). Hours of operation are 5:00 a.m. to 8:00 p.m.

The City's Dial-A-Ride program is a shared-ride, curb-to-curb service for ADA-certified individuals as well as seniors age 65 and above. Riders must complete a Dial-A-Ride application to be eligible for the service.

During the audit period, the City launched the Simi Valley Transit On Demand service as a pilot program. SVT On Demand is a flexible rideshare same-day service (microtransit). The service operates 8:30 a.m. to 6:00 p.m., Monday through Friday.

This performance audit was conducted in accordance with generally accepted government auditing standards. Those standards require that the audit team plans and performs the audit to obtain sufficient, appropriate evidence to provide a reasonable basis for its findings and conclusions based on the audit objectives. Moore & Associates, Inc. believes the evidence obtained provides a reasonable basis for our findings and conclusions.

This audit was also conducted in accordance with the processes established by the California Department of Transportation (Caltrans), as outlined in the *Performance Audit Guidebook for Transit Operators and Regional Transportation Planning Entities*.

The Triennial Performance Audit includes five elements:

- Compliance requirements,
- Prior recommendations,
- Analysis of program data reporting,
- Performance Audit, and
- Functional review.

Test of Compliance

Based on discussions with Simi Valley Transit staff, analysis of program performance, and an audit of program compliance and function, the audit team presents no compliance findings.

Status of Prior Recommendations

The prior audit – completed in April 2023 by Moore & Associates, Inc. for the three fiscal years ending June 30, 2022 – included no recommendations.

Findings and Recommendations

Based on discussions with City staff, analysis of program performance, and a review of program compliance and function, the audit team submits no findings related to TDA compliance for the City of Simi Valley.

Recommendations are intended to assist in bringing the operator into compliance with the requirements and standards of the TDA as well as address non-compliance-related issues, challenges, or opportunities observed during the site visit and functional review. The following recommendation is presented for the City of Simi Valley.

Exhibit 1.1 Summary of Audit Recommendations

Recommendations		Importance	Timeline
1	The City should continue its efforts to fully staff its driver workforce.	High	FY 2026/27

Chapter 2 | Audit Scope and Methodology

The Triennial Performance Audit (TPA) of Simi Valley Transit's public transit program covers the three-year period ending June 30, 2025. The California Public Utilities Code requires all recipients of Transit Development Act (TDA) funding to complete an independent review on a three-year cycle in order to maintain funding eligibility.

In 2025, the Ventura County Transportation Commission selected Moore & Associates, Inc., to prepare Triennial Performance Audits of itself as the RTPA and the 10 transit operators to which it allocates TDA funding. Moore & Associates, Inc. is a consulting firm specializing in public transportation, including audits of non-TDA Article 4 recipients. Selection of Moore & Associates, Inc. followed a competitive procurement process.

The Triennial Performance Audit is designed to be an independent and objective evaluation of Simi Valley Transit as a public transit operator. Direct benefits of a Triennial Performance Audit include providing operator management with information on the economy, efficiency, and effectiveness of its programs across the prior three years; helpful insight for use in future planning; and assuring legislative and governing bodies (as well as the public) that resources are being economically and efficiently utilized. Finally, the Triennial Performance Audit fulfills the requirement of PUC Section 99246(a) that the RTPA designate an entity other than itself to conduct a performance audit of the activities of each operator to whom it allocates funds.

This performance audit was conducted in accordance with generally accepted government auditing standards. Those standards require that the audit team plans and performs the audit to obtain sufficient, appropriate evidence to provide a reasonable basis for its findings and conclusions based on the audit objectives. The auditors believe the evidence obtained provides a reasonable basis for our findings and conclusions.

The audit was also conducted in accordance with the processes established by the California Department of Transportation (Caltrans), as outlined in the *Performance Audit Guidebook for Transit Operators and Regional Transportation Planning Entities*, as well as *Government Auditing Standards* published by the U.S. Comptroller General.

Objectives

A Triennial Performance Audit (TPA) has four primary objectives:

1. Assess compliance with TDA regulations;
2. Review improvements subsequently implemented as well as progress toward adopted goals;
3. Evaluate the efficiency and effectiveness of the transit operator; and
4. Provide sound, constructive recommendations for improving the efficiency and functionality of the transit operator.

Scope

The TPA is a systematic review of performance evaluating the efficiency, economy, and effectiveness of the transit operator. The audit of Simi Valley Transit included six tasks:

1. A review of compliance with TDA requirements and regulations.
2. A review of the status of recommendations included in the prior Triennial Performance Audit.
3. A verification of the methodology for calculating performance indicators including the following activities:
    - Assessment of internal controls,
    - Test of data collection methods,
    - Calculation of performance indicators, and
    - Evaluation of performance.
4. Comparison of data reporting practices:
    - Internal reports,
    - State Controller Reports, and
    - National Transit Database.
5. Examination of the following functions:
    - General management and organization;
    - Service planning;
    - Administration;
    - Marketing and public information;
    - Scheduling, dispatching, and operations;
    - Personnel management and training; and
    - Maintenance.
6. Conclusions and recommendations to address opportunities for improvement based upon analysis of the information collected and the audit of the transit operator's major functions.

Methodology

The methodology for the Triennial Performance Audit of the City of Simi Valley included thorough review of documents relevant to the scope of the audit, as well as information contained on Simi Valley Transit's website. The documents reviewed included the following (spanning the full three-year period):

- Monthly performance reports;
- State Controller Reports;
- Annual budgets;
- TDA fiscal audits;
- Transit marketing collateral;
- TDA claims;
- Fleet inventory;
- Preventive maintenance schedules and forms;
- California Highway Patrol Terminal Inspection reports;
- National Transit Database reports;

- Accident/road call logs; and
- Organizational chart.

The methodology for this review included a virtual site visit on February 4, 2026. The audit team met with Ben Gonzales (Deputy Public Works Director), Tan Koehler (Senior Management Analyst), Gian Maria Garcia (Management Analyst), Christopher Chavez (Maintenance Superintendent), Chris Vaughn (Fleet Maintenance Supervisor), and Mary Lozano (Operations), and reviewed materials germane to the triennial audit.

This report is comprised of eight chapters divided into three sections:

1. Executive Summary: A summary of the key findings and recommendations developed during the Triennial Performance Audit process.
2. TPA Scope and Methodology: Methodology of the review and pertinent background information.
3. TPA Results: In-depth discussion of findings surrounding each of the subsequent elements of the audit:
    - Compliance with statutory and regulatory requirements,
    - Status of prior recommendations,
    - Consistency among reported data,
    - Performance measures and trends,
    - Functional review, and
    - Findings and recommendations.

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Chapter 3 | Program Compliance

This section examines Simi Valley Transit's compliance with the Transportation Development Act as well as relevant sections of the California Code of Regulations. An annual certified fiscal audit confirms TDA funds were apportioned in conformance with applicable laws, rules, and regulations. Simi Valley Transit considers full use of funds under California Code of Regulations (CCR) 6754(a) as referring to operating funds but not capital funds. The TPA findings and related comments are delineated in Exhibit 3.1.

Status of compliance items was determined through discussions with Simi Valley Transit staff as well as an inspection of relevant documents including the fiscal audits for each year of the triennium, State Controller annual filings, California Highway Patrol terminal inspections, annual operating budgets, year-end performance reports, and other compliance-related documentation.

No compliance issues were identified for the City of Simi Valley.

Developments Occurring During the Audit Period

For many transit operators in California, recent years have reflected both the acute impacts of and recovery from the COVID-19 pandemic. By the end of FY 2024/25 – even earlier in some cases – most operators had exhausted federal relief funds, even though penalties for non-compliance with farebox recovery ratios continued to be waived. However, the receipt of federal relief funds complicated matters, as they impacted the amount of TDA funding operators were eligible to receive and, in some cases, resulted in over-payments that had to be resolved after the funds were spent. Many operators, even more than five years after the onset of the pandemic, still struggle with ridership that has yet to return to pre-pandemic levels.

California Assembly Bill 90, signed into law on June 29, 2020, provided temporary regulatory relief for transit operators required to conform with Transportation Development Act (TDA) farebox recovery ratio thresholds in FY 2019/20 and FY 2020/21. California Assembly Bill 149, signed into law on July 16, 2021, provided additional regulatory relief by extending the provisions of AB 90 through FY 2022/23 and adjusting definitions of eligible revenues and operating costs. Most recently, California Senate Bill 125, signed into law on July 10, 2023, extended protections provided via earlier legislation through FY 2025/26. While this means the audit period covered by this audit is fully exempt from penalties for non-compliance with the farebox recovery ratio, for example, it also means that transit operators may need to be in compliance by the second year of the next audit period.

While the ability to maintain state mandates and performance measures is important, these measures enabled transit operators to adjust to the impacts of the COVID-19 pandemic while continuing to receive their full allocations of funding under the TDA.

Together, these three pieces of legislation include the following additional provisions specific to transit operator TDA funding under Article 4:

- Prohibits the imposition of the TDA revenue penalty on an operator that did not maintain the required ratio of fare revenues to operating cost from FY 2019/20 through FY 2025/26.

- Expands the definition of "local funds" to enable the use of federal funding to supplement fare revenues and allows operators to calculate free and reduced fares at their actual value.
- Adjusts the definition of operating cost to exclude the cost of ADA paratransit services, demand-response and micro-transit services designed to extend access to service, ticketing/payment systems, security, some pension costs, and some planning costs.
- Allows operators to use STA funds as needed to keep transit service levels from being reduced or eliminated through FY 2025/26.

SB 125 also called for the establishment of the Transit Transformation Task Force to develop policy recommendations aimed at increasing transit ridership and improving the customer experience statewide. In the more than 50 years since the adoption of the Transportation Development Act (TDA), California's public transportation landscape has evolved significantly. Many transit operators have struggled to meet the farebox recovery ratio requirement, raising questions about whether it remains an appropriate or effective measure of TDA compliance.

In 2018, the chairs of California's legislative transportation committees asked the California Transit Association to convene a policy task force to examine the TDA. That effort produced a draft framework for reform in early 2020, just prior to the COVID-19 pandemic. The Transit Transformation Task Force released its report in December 2025. While the report includes several recommendations to modernize the TDA - including identifying the farebox recovery ratio and operating cost per hour requirements as outdated and recommending that farebox recovery and cost-inflation penalties be replaced - these proposals represent an initial step rather than immediate policy changes. Achieving the necessary funding and statutory reforms will require sustained advocacy over the coming years.

Exhibit 3.1 Transit Development Act Compliance Requirements

Compliance Element	Reference	Compliance	Comments
State Controller Reports submitted on time.	PUC 99243	In compliance	*Transit Operator* FY 2022/23: January 26, 2024 FY 2023/24: January 22, 20205 FY 2024/25: February 2, 2026 *Specialized Service* FY 2022/23: January 30, 2024 FY 2023/24: January 22, 20205 FY 2024/25: February 2, 2026
Fiscal and compliance audits submitted within 180 days following the end of the fiscal year (or with up to 90-day extension).	PUC 99245	In compliance	FY 2022/23: March 14, 2024 FY 2023/24: February 18, 2025 FY 2024/25: February 3, 2026
Operator's terminal rated as satisfactory by CHP within the 13 months prior to each TDA claim.	PUC 99251 B	In compliance	January 24, 2022 January 25, 2023 January 25, 2024 January 23, 2025
Operator's claim for TDA funds submitted in compliance with rules and regulations adopted by the RTPA.	PUC 99261	In compliance	
If operator serves urbanized and non-urbanized areas, it has maintained a ratio of fare revenues to operating costs at least equal to the ratio determined by the rules and regulations adopted by the RTPA.	PUC 99270.1	Not applicable	
Except as otherwise provided, the allocation for any purpose specified under Article 8 may in no year exceed 50% of the amount required to meet the total planning expenditures for that purpose.	PUC 99405	Not applicable	
An operator receiving allocations under Article 8(c) may be subject to regional, countywide, or subarea performance criteria, local match requirements, or fare recovery ratios adopted by resolution of the RTPA.	PUC 99405	Not applicable	
The operator's definitions of performance measures are consistent with the Public Utilities Code Section 99247.	PUC 99247	In compliance	
The operator does not routinely staff with two or more persons a vehicle for public transportation purposes designed to be operated by one person.	PUC 99264	In compliance	

Compliance Element	Reference	Compliance	Comments
The operator's operating budget has not increased by more than 15% over the preceding year, nor is there a substantial increase or decrease in the scope of operations or capital budget provisions for major new fixed facilities unless the operator has reasonably supported and substantiated the change(s).	PUC 99266	In compliance	FY 2022/23: +30.27% FY 2023/24: +14.28% FY 2024/25: -2.08% *Source: TDA claims. In FY 2023, the increase in operating budget is due to increased payroll costs and contract services for paratransit as well as a cost of living adjustment and full staffing level. In addition, the FY 2022 actual costs were lower due to leaves of absence and vacancies due to the pandemic.*
The expenditure of funds received under Article 4 may not exceed 50 percent of the amount required to meet operating, maintenance, and capital and debt service requirements after the deduction of federal funds and amounts allocated under PUC 99314.5 (STA).	PUC 99268	In compliance	
If the operator serves an urbanized area, it has maintained a ratio of fare revenues to operating cost at least equal to one-fifth (20 percent).	PUC 99268.2, 99268.4, 99268.1	In compliance	FY 2022/23: 20% FY 2023/24: 20% FY 2024/25: 20% *Source: TDA fiscal audits.*
If the operator serves a rural area, it has maintained a ratio of fare revenues to operating cost at least equal to one-tenth (10 percent).	PUC 99268.2, 99268.4, 99268.5	Not applicable	
For a claimant that provides only services to elderly and handicapped persons, the ratio of fare revenues to operating cost shall be at least 10 percent.	PUC 99268.5, CCR 6633.5	In compliance	FY 2022/23: 10% FY 2023/24: 10% FY 2024/25: 10% *Source: TDA fiscal audits*
If the operator has utilized the exemption from the farebox recovery requirement for extension of services, it shall submit a report on the service to the RTPA within 90 days of the end of the first year of implementation.	PUC 99268.8, CCR 6633.8	Not applicable	
The current cost of the operator's retirement system is fully funded with respect to the officers and employees of its public transportation system, or the operator is implementing a plan approved by the RTPA, which will fully fund the retirement system for 40 years.	PUC 99271	In compliance	City staff are eligible to receive retirement benefits through CalPERS.
An operator claiming funds under Article 4.5 (CTSA) is in compliance with PUC 99268.3, 99268.4, 99268.5, or 99268.9, or regional, countywide, or county subarea performance criteria, local match requirements, or fare recovery ratios adopted by the RTPA.	PUC 99275.5	Not applicable	

Compliance Element	Reference	Compliance	Comments
If the operator receives State Transit Assistance funds, the operator makes full use of funds available to it under the Urban Mass Transportation Act of 1964 before TDA claims are granted.	CCR 6754 (a) (3)	In compliance	
In order to use State Transit Assistance funds for operating assistance, the operator's total operating cost per revenue hour does not exceed the sum of the preceding year's total plus an amount equal to the product of the percentage change in the CPI for the same period multiplied by the preceding year's total operating cost per revenue hour. An operator may qualify based on the preceding year's operating cost per revenue hour or the average of the three prior years. If an operator does not meet these qualifying tests, the operator may only use STA funds for operating purposes according to a sliding scale.	PUC 99314.6	In compliance	The City did not use STA funds for operating purposes during the audit period. This requirement was waived during the audit period under AB 149 and SB 125.
For an operator qualifying under PUC 99268.1, the funds received from the local transportation fund under Article 4 shall not exceed 50 percent of the amount that is the sum of the operator's operating cost, capital requirements, and debt service requirements less the sum of the operator's revenues from federal grants and the state transit assistance fund. The operator may receive from the local transportation fund up to 100 percent, rather than 50 percent, of the amount representing the operating cost of an extension of its public transportation system if the extension is within the definition of Section 6619.1 and if all the conditions of Section 6633.8 are met.	CCR 6633.1	Not applicable	
A transit claimant is precluded from receiving monies from the Local Transportation Fund and the State Transit Assistance Fund in an amount which exceeds the claimant's capital and operating costs less the actual amount of fares received, the amount of local support required to meet the fare ratio, the amount of federal operating assistance, and the amount received during the year from a city or county to which the operator has provided services beyond its boundaries.	CCR 6634	In compliance	

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Chapter 4 | Prior Recommendations

This section reviews and evaluates the implementation of prior Triennial Performance Audit recommendations. This objective assessment provides assurance the City of Simi Valley has made quantifiable progress toward improving both the efficiency and effectiveness of its public transit program.

The prior audit – completed in April 2023 by Moore & Associates, Inc. for the three fiscal years ending June 30, 2022 – included no recommendations.

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Chapter 5 | Data Reporting Analysis

An important aspect of the Triennial Performance Audit process is assessing how effectively and consistently the transit operator reports performance statistics to local, state, and federal agencies. Often as a condition of receipt of funding, an operator must collect, manage, and report data to different entities. Ensuring such data are consistent can be challenging given the differing definitions employed by different agencies as well as the varying reporting timeframes. This chapter examines the consistency of performance data reported by the City internally as well as to outside entities such as the State Controller's Office and National Transit Database (NTD) during the audit period.

Performance data was generally reported consistently, with only minor variances between sources. There was greater variance regarding financial data and full-time equivalent employees, which are discussed below.

- **Operating cost:** Operating cost reported in the TDA fiscal audit is typically higher than that reported to the State Controller and NTD. Throughout the audit period, the TDA audit amount was up to 18.8 percent higher than that reported externally. In addition, the variance between what was reported to the NTD and State Controller ranged from 0.6 percent to 4.4 percent during the audit period. The differences in cost pertained to both fixed-route and demand-response services. Given neither the TDA audit nor the NTD report itemize operating expenses, it is impossible to determine where the discrepancies lie with the data provided.

- **Fare Revenue:** Fare revenues reported to the State Controller and in the fiscal audit were consistent with one another and higher than those reported to the NTD. This is due to the City reporting fares and subsidies together under passenger fares in the audit and State Controller Report, and only reporting passenger- and organization-paid fares in the NTD report.

- **Full-Time Equivalent (FTE) Employees:** During the first two years of the audit period, the FTE demonstrated through the operator's calculation methodology was not consistent. However, by FY 2024/25, the City was utilizing the proper definition and reporting its FTE correctly. Minor variances are typically attributed to rounding.

Exhibit 5.1 Data Reporting Comparison

Performance Measure	System-Wide		
	FY 2022/23	FY 2023/24	FY 2024/25
Operating Cost (Actual $)			
TDA fiscal audit	$9,016,034	$9,838,213	
National Transit Database	$7,589,524	$8,710,448	$8,615,926
State Controller Report	$7,632,742	$8,999,801	$8,990,954
Fare Revenue (Actual $)			
TDA fiscal audit	$282,560	$344,047	
National Transit Database	$265,528	$324,119	$318,034
State Controller Report	$282,560	$344,047	$337,475
Vehicle Service Hours (VSH)			
Monthly Performance Reports	35,924	36,669	35,264
National Transit Database	35,925	36,685	35,268
State Controller Report	35,925	36,685	36,263
Vehicle Service Miles (VSM)			
Monthly Performance Reports	528,375	538,351	529,432
National Transit Database	528,382	538,351	530,006
State Controller Report	528,382	538,350	529,432
Passengers			
Monthly Performance Reports	207,041	239,398	232,970
National Transit Database	206,836	239,247	232,970
State Controller Report	210,056	239,247	232,970
Full-Time Equivalent Employees			
State Controller Report	33	27	42
Per TDA methodology	38	42	41

Chapter 6 | Performance Analysis

Performance indicators are typically employed to quantify and assess the efficiency of a transit operator's activities. Such indicators provide insight into current operations as well as trend analysis of operator performance. Through a review of indicators, relative performance as well as possible inter-relationships between major functions is revealed.

The Transportation Development Act (TDA) requires recipients of TDA funding to track and report five performance indicators:

- Operating Cost/Passenger,
- Operating Cost/Vehicle Service Hour,
- Passengers/Vehicle Service Hour,
- Passengers/Vehicle Service Mile, and
- Vehicle Service Hours/Employee.

To assess the validity and use of performance indicators, the audit team performed the following activities:

- Assessed internal controls in place for the collection of performance-related information,
- Validated collection methods of key data,
- Calculated performance indicators, and
- Evaluated performance indicators.

The procedures used to calculate TDA-required performance measures for the current triennium were verified and compared with indicators included in similar reports to external entities (i.e., State Controller and Federal Transit Administration).

Operating Cost

The Transportation Development Act requires an operator to track and report transit-related costs reflective of the Uniform System of Accounts and Records developed by the State Controller and the California Department of Transportation. The most common method for ensuring this occurs is through a compliance audit report prepared by an independent auditor in accordance with California Code of Regulations Section 6667[1]. The annual independent financial audit should confirm the use of the Uniform System of Accounts and Records. *Operating cost* – as defined by PUC Section 99247(a) – excluded the following during the audit period[2]:

[1] CCR Section 6667 outlines the minimum tasks which must be performed by an independent auditor in conducting the annual fiscal and compliance audit of the transit operator.

[2] Given the passage of AB 149, the list of excluded costs will be expanded beginning with FY 2021/22.

- Cost in the depreciation and amortization expense object class adopted by the State Controller pursuant to PUC Section 99243,
- Subsidies for commuter rail services operated under the jurisdiction of the Interstate Commerce Commission,
- Direct costs of providing charter service, and
- Vehicle lease costs.

Vehicle Service Hours and Miles

Vehicle Service Hours (VSH) and *Miles* (VSM) are defined as the time/distance during which a revenue vehicle is available to carry fare-paying passengers, and which includes only those times/miles between the time or scheduled time of the first passenger pickup and the time or scheduled time of the last passenger drop-off during a period of the vehicle's continuous availability.[3] For example, demand-response service hours include those hours when a vehicle has dropped off a passenger and is traveling to pick up another passenger, but not those hours when the vehicle is unavailable for service due to driver breaks or lunch. For both demand-response and fixed-route services, service hours will exclude hours of "deadhead" travel to the first scheduled pick-up, and will also exclude hours of "deadhead" travel from the last scheduled drop-off back to the terminal. For fixed-route service, a vehicle is in service from first scheduled stop to last scheduled stop, whether or not passengers board or exit at those points (i.e., subtracting driver lunch and breaks but including scheduled layovers).

Passenger Counts

According to the Transportation Development Act, *total passengers* is equal to the total number of unlinked trips (i.e., those trips that are made by a passenger that involve a single boarding and departure), whether revenue-producing or not.

Employees

Employee hours is defined as the total number of hours (regular or overtime) which all employees have worked, and for which they have been paid a wage or salary. The hours must include transportation system-related hours worked by persons employed in connection with the system (whether or not the person is employed directly by the operator). Full-Time Equivalent (FTE) is calculated by dividing the number of person-hours by 2,000.

Fare Revenue

Fare revenue is defined by California Code of Regulations Section 6611.2 as revenue collected from the farebox plus sales of fare media. Given other revenues may be added to fare revenue for the calculation of the farebox recovery ratio, the Farebox Recovery cited within this section is not necessarily consistent with the farebox recovery ratio used for compliance determination in Chapter 4.

[3] A vehicle is considered to be in revenue service despite a no-show or late cancellation if the vehicle remains available for passenger use.

TDA Required Indicators

To calculate the TDA indicators for Simi Valley Transit, the following sources were employed:

- Operating Cost was not independently calculated as part of this audit. Operating Cost data were obtained via State Controller Reports for each fiscal year covered by this audit. Operating Cost from the reports was compared against that reported in the City's audited financial reports and appeared to be consistent with TDA guidelines. In accordance with PUC Section 99247(a), the reported costs excluded depreciation and other allowable expenses.
- Fare Revenue was not independently calculated as part of this audit. Fare revenue data were obtained via State Controller Reports for each fiscal year covered by this audit. This appears to be consistent with TDA guidelines as well as the uniform system of accounts. Fare revenue data reported to the State Controller may reflect other revenues not reported as fare revenue to the NTD.
- Vehicle Service Hours (VSH) data were obtained via State Controller Reports for each fiscal year covered by this audit. The City documents fixed-route VSH through its Genfare/Syncromatics platforms and demand-response VSH through its Ecolane platform.
- Vehicle Service Miles (VSM) data were obtained via State Controller Reports for each fiscal year covered by this audit. The City documents fixed-route VSM through its Genfare/Syncromatics platforms and demand-response VSH through its Ecolane platform.
- Unlinked trip data were obtained via State Controller Reports for each fiscal year covered by this audit. The City documents fixed-route passengers through its Genfare/Syncromatics platforms and demand-response passengers through its Ecolane platform.
- Full-Time Equivalent (FTE) data were obtained from State Controller Reports for each fiscal year covered by this review. Use of the TDA definition regarding FTE calculation was confirmed.

System Performance Trends

System-wide, operating cost experienced a net 17.8 percent increase during the audit period, and a 23.4 percent net increase across the last six years. Fare revenue has steadily increased since its sharp decline in FY 2020/21 due to COVID-19. This resulted in a net 19.4 percent increase during the audit period and a net 0.4 percent decrease over six years.

Vehicle service hours (VSH) remained steady during the audit period, following a sharp decline between FY 2019/20 and FY 2020/21 (15.3 percent). This resulted in a net 0.9 percent increase during the audit period and a net 5.8 percent decrease during the six-year period. Vehicle service miles (VSM) increased between FY 2021/22 and FY 2023/24. This resulted in an overall net increase of 0.2 percent during the audit period, and a net increase of 4.1 percent during the six-year period. Ridership experienced a similar pattern as VSM, resulting in a 10.9 percent net increase during the audit period and an 8.6 percent net increase across the six-year period.

Cost-related metrics typically provide an indicator of a system's efficiency, while passenger-related metrics offer insight into its productivity. Improvements are characterized by increases in passenger-related metrics and decreases in cost-related metrics. Due to the increased operating cost during two of the three years, cost-related metrics increased during the audit period, indicating a decrease in efficiency.

However, passenger-related metrics rose during the audit period, with passengers per VSH increasing 9.9 percent and passengers per VSM increasing 10.7 percent, indicating an improvement in productivity.

Exhibit 6.1 System Performance Indicators

Performance Measure	System-wide					
	FY 2019/20	FY 2020/21	FY 2021/22	FY 2022/23	FY 2023/24	FY 2024/25
Operating Cost (Actual $)	$7,283,316	$7,273,627	$6,688,500	$7,632,742	$8,999,801	$8,990,954
Annual Change		*-0.1%*	*-8.0%*	*14.1%*	*17.9%*	*-0.1%*
Fare Revenue (Actual $)	$338,726	$72,788	$180,585	$282,560	$344,047	$337,475
Annual Change		*-78.5%*	*148.1%*	*56.5%*	*21.8%*	*-1.9%*
Vehicle Service Hours (VSH)	38,488	32,606	34,553	35,925	36,685	36,263
Annual Change		*-15.3%*	*6.0%*	*4.0%*	*2.1%*	*-1.2%*
Vehicle Service Miles (VSM)	508,613	480,529	510,664	528,382	538,350	529,432
Annual Change		*-5.5%*	*6.3%*	*3.5%*	*1.9%*	*-1.7%*
Passengers	214,505	144,576	167,285	210,056	239,247	232,970
Annual Change		*-32.6%*	*15.7%*	*25.6%*	*13.9%*	*-2.6%*
Employees	39	37	33	33	27	42
Annual Change		*-5.1%*	*-10.8%*	*0.0%*	*-18.2%*	*55.6%*
Performance Indicators						
Operating Cost/VSH (Actual $)	$189.24	$223.08	$193.57	$212.46	$245.33	$247.94
Annual Change		*17.9%*	*-13.2%*	*9.8%*	*15.5%*	*1.1%*
Operating Cost/Passenger (Actual	$33.95	$50.31	$39.98	$36.34	$37.62	$38.59
Annual Change		*48.2%*	*-20.5%*	*-9.1%*	*3.5%*	*2.6%*
Passengers/VSH	5.57	4.43	4.84	5.85	6.52	6.42
Annual Change		*-20.4%*	*9.2%*	*20.8%*	*11.5%*	*-1.5%*
Passengers/VSM	0.42	0.30	0.33	0.40	0.44	0.44
Annual Change		*-28.7%*	*8.9%*	*21.4%*	*11.8%*	*-1.0%*
Farebox Recovery	4.7%	1.0%	2.7%	3.7%	3.8%	3.8%
Annual Change		*-78.5%*	*169.8%*	*37.1%*	*3.3%*	*-1.8%*
Hours/Employee	986.9	881.2	1,047.1	1,088.6	1,358.7	863.4
Annual Change		*-10.7%*	*18.8%*	*4.0%*	*24.8%*	*-36.5%*
TDA Non-Required Indicators						
Operating Cost/VSM	$14.32	$15.14	$13.10	$14.45	$16.72	$16.98
Annual Change		*5.7%*	*-13.5%*	*10.3%*	*15.7%*	*1.6%*
VSM/VSH	13.21	14.74	14.78	14.71	14.67	14.60
Annual Change		*11.5%*	*0.3%*	*-0.5%*	*-0.2%*	*-0.5%*
Fare/Passenger	$1.58	$0.50	$1.08	$1.35	$1.44	$1.45
Annual Change		*-68.1%*	*114.4%*	*24.6%*	*6.9%*	*0.7%*

Sources: FY 2019/20 – FY 2021/22 data from prior audit. FY 2022/23 – FY 2024/25 data from State Controller Reports.

Exhibit 6.2 System Ridership

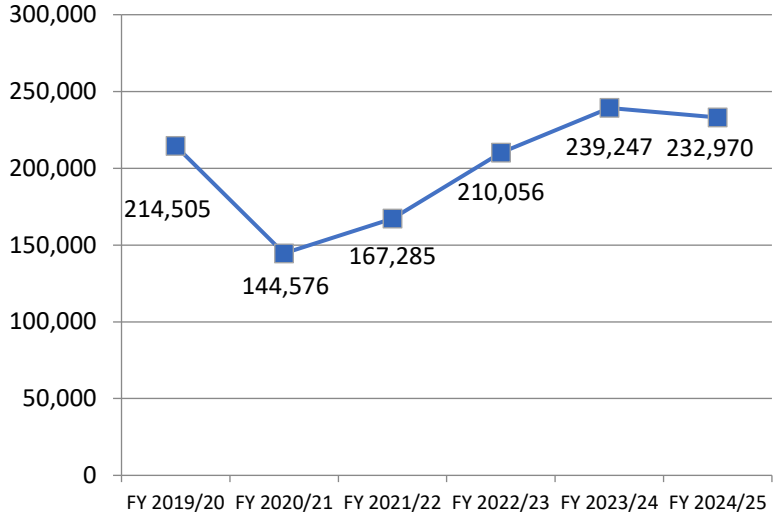


Exhibit 6.3 System Operating Cost/VSH

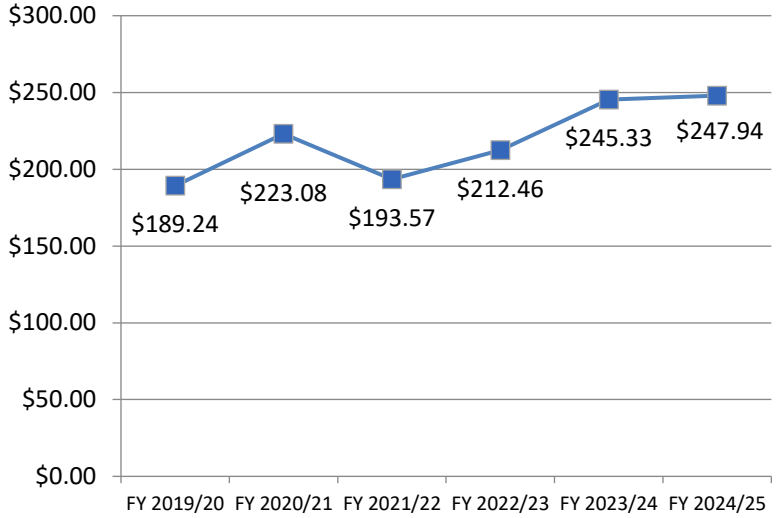


Exhibit 6.4 System Operating Cost/VSM

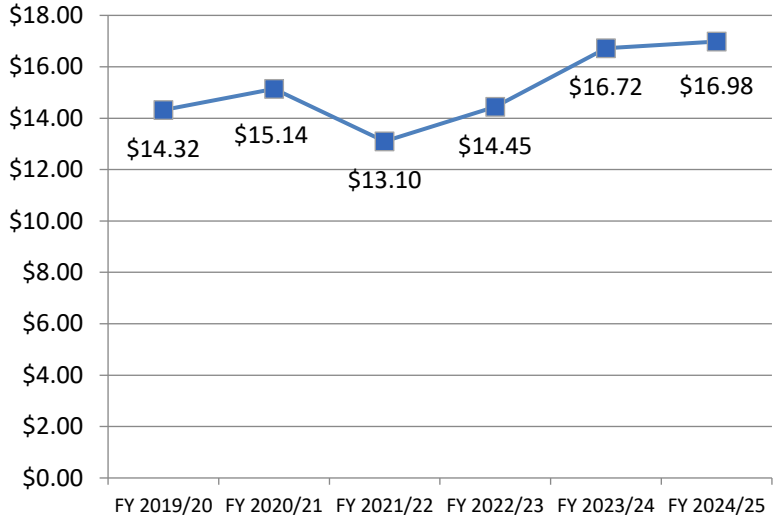


Exhibit 6.5 System VSM/VSH

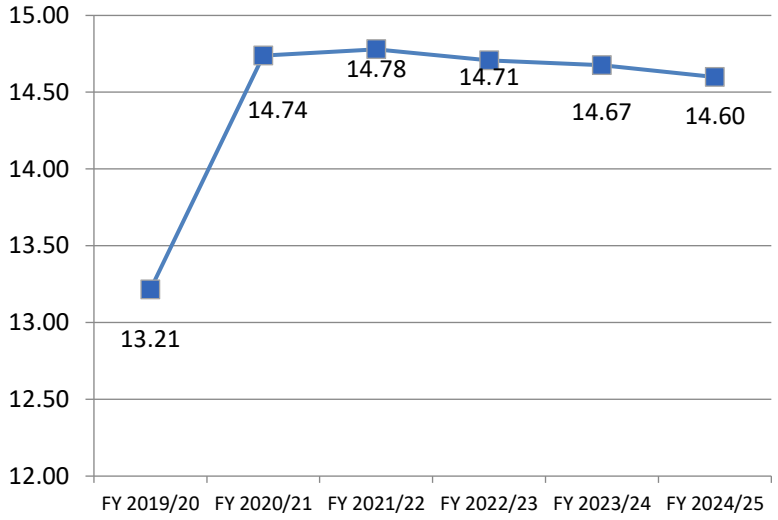


Exhibit 6.6 System Operating Cost/Passenger

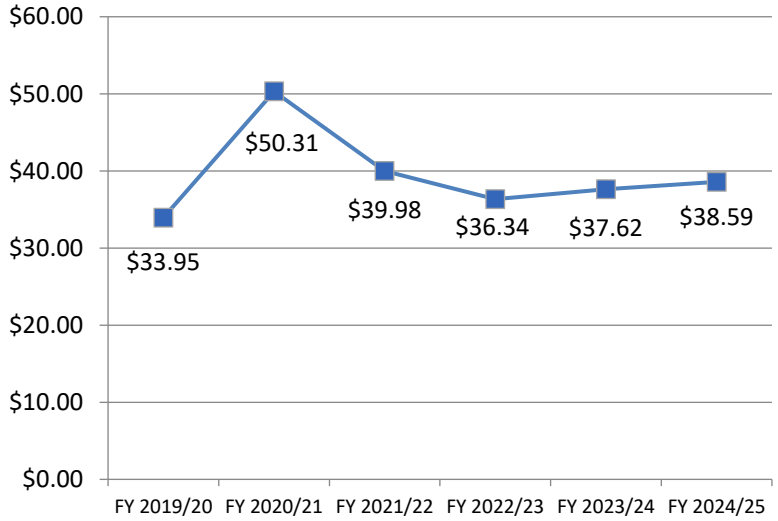


Exhibit 6.7 System Passengers/VSH

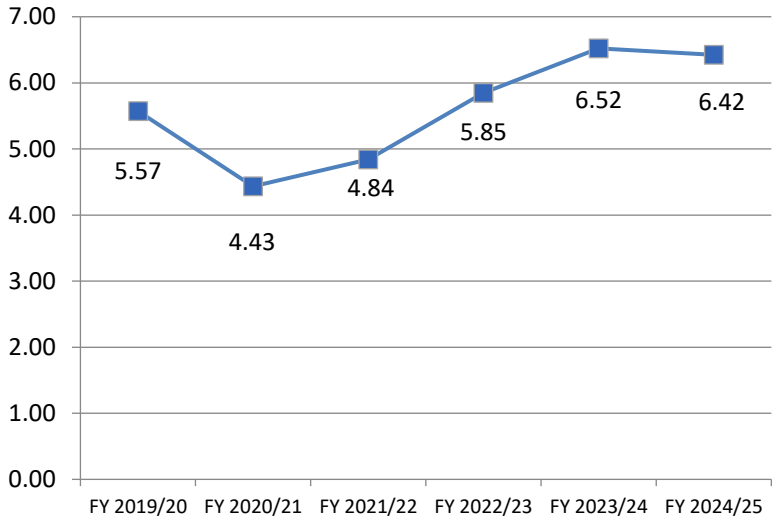


Exhibit 6.8 System Passengers/VSM

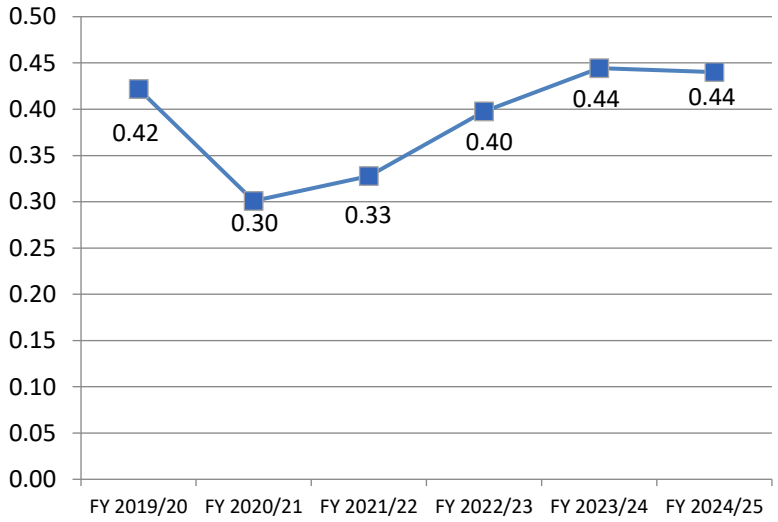


Exhibit 6.9 System VSH/FTE

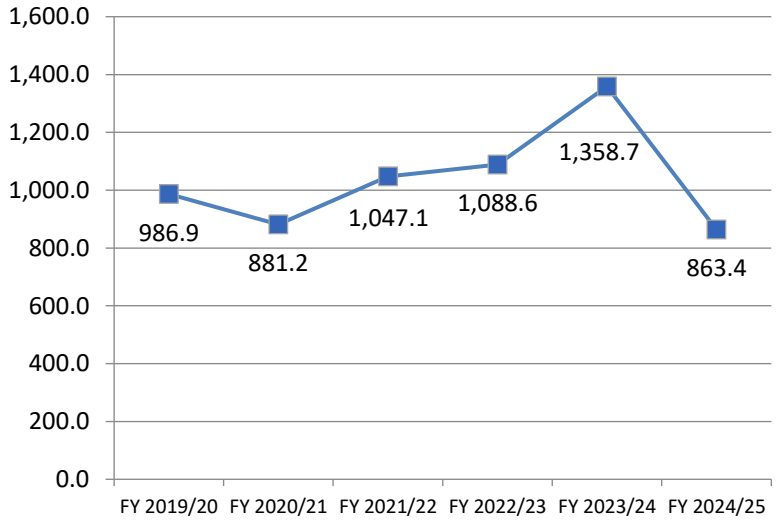


Exhibit 6.10 System Farebox Recovery

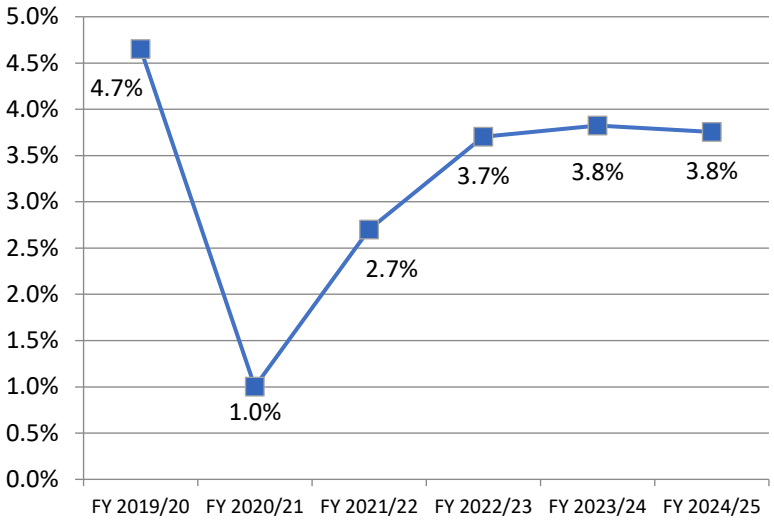
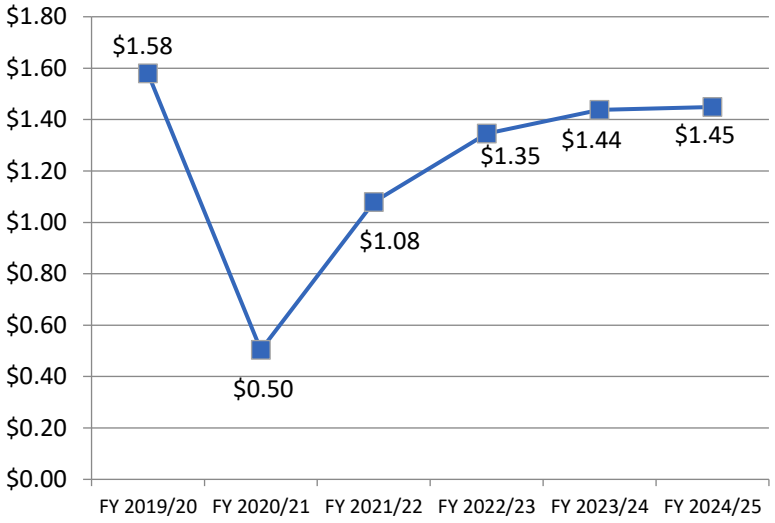


Exhibit 6.11 System Fare/Passenger



Fixed-Route Performance Trends

Fixed-route operating cost experienced a net 24.9 percent increase during the audit period, and a 38.3 percent net increase across the last six years. Fare revenue, however, steadily increased during four years of the six-year period, with the greatest increase occurring in FY 2021/22 (107.6 percent). This resulted in a net 25.9 percent increase during the audit period, but a net 3.5 percent decrease over six years.

Vehicle service hours (VSH) fluctuated during the six-year period. This resulted in a net 2.5 percent decrease during the audit period and a net 4.1 percent increase across the six-year period. Vehicle service miles (VSM) experienced a net 1.7 percent decrease during the audit period and a net 2.0 percent increase during the six-year period. Ridership rose every year after FY 2020/21, resulting in an 18.1 percent net increase during the audit period and a 5.3 percent net increase across the six-year period.

Due to the increase in operating cost throughout the audit period, fixed-route cost-related metrics increased as well. Passenger-related metrics rose during the audit period, with passengers per VSH increasing 21.2 percent and passengers per VSM increasing 20.1 percent.

Exhibit 6.12 Fixed-Route Performance Indicators

Performance Measure	Fixed-Route					
	FY 2019/20	FY 2020/21	FY 2021/22	FY 2022/23	FY 2023/24	FY 2024/25
Operating Cost (Actual $)	$4,207,282	$5,112,389	$4,399,164	$4,655,915	$5,830,084	$5,816,848
Annual Change		*21.5%*	*-14.0%*	*5.8%*	*25.2%*	*-0.2%*
Fare Revenue (Actual $)	$260,256	$63,830	$132,549	$199,507	$252,057	$251,254
Annual Change		*-75.5%*	*107.7%*	*50.5%*	*26.3%*	*-0.3%*
Vehicle Service Hours (VSH)	25,283	26,816	26,746	26,993	26,808	26,310
Annual Change		*6.1%*	*-0.3%*	*0.9%*	*-0.7%*	*-1.9%*
Vehicle Service Miles (VSM)	387,056	409,132	405,822	401,305	402,067	394,637
Annual Change		*5.7%*	*-0.8%*	*-1.1%*	*0.2%*	*-1.8%*
Passengers	181,098	121,642	131,392	161,404	190,162	190,692
Annual Change		*-32.8%*	*8.0%*	*22.8%*	*17.8%*	*0.3%*
Employees	18	19	19	19	16	21
Annual Change		*5.6%*	*0.0%*	*0.0%*	*-15.8%*	*31.3%*
Performance Indicators						
Operating Cost/VSH (Actual $)	$166.41	$190.65	$164.48	$172.49	$217.48	$221.09
Annual Change		*14.6%*	*-13.7%*	*4.9%*	*26.1%*	*1.7%*
Operating Cost/Passenger (Actual $)	$23.23	$42.03	$33.48	$28.85	$30.66	$30.50
Annual Change		*80.9%*	*-20.3%*	*-13.8%*	*6.3%*	*-0.5%*
Passengers/VSH	7.16	4.54	4.91	5.98	7.09	7.25
Annual Change		*-36.7%*	*8.3%*	*21.7%*	*18.6%*	*2.2%*
Passengers/VSM	0.47	0.30	0.32	0.40	0.47	0.48
Annual Change		*-36.5%*	*8.9%*	*24.2%*	*17.6%*	*2.2%*
Farebox Recovery	6.19%	1.25%	3.01%	4.29%	4.32%	4.32%
Annual Change		*-79.8%*	*141.3%*	*42.2%*	*0.9%*	*-0.1%*
Hours/Employee	1,404.6	1,411.4	1,407.7	1,420.7	1,675.5	1,252.9
Annual Change		*0.5%*	*-0.3%*	*0.9%*	*17.9%*	*-25.2%*
TDA Non-Required Indicators						
Operating Cost/VSM	$10.87	$12.50	$10.84	$11.60	$14.50	$14.74
Annual Change		*15.0%*	*-13.2%*	*7.0%*	*25.0%*	*1.7%*
VSM/VSH	15.31	15.26	15.17	14.87	15.00	15.00
Annual Change		*-0.3%*	*-0.5%*	*-2.0%*	*0.9%*	*0.0%*
Fare/Passenger	$1.44	$0.52	$1.01	$1.24	$1.33	$1.32
Annual Change		*-63.5%*	*92.2%*	*22.5%*	*7.2%*	*-0.6%*

Sources: FY 2019/20 – FY 2021/22 data from prior audit. FY 2022/23 – FY 2024/25 data from State Controller Reports.

Exhibit 6.13 Fixed-Route Ridership

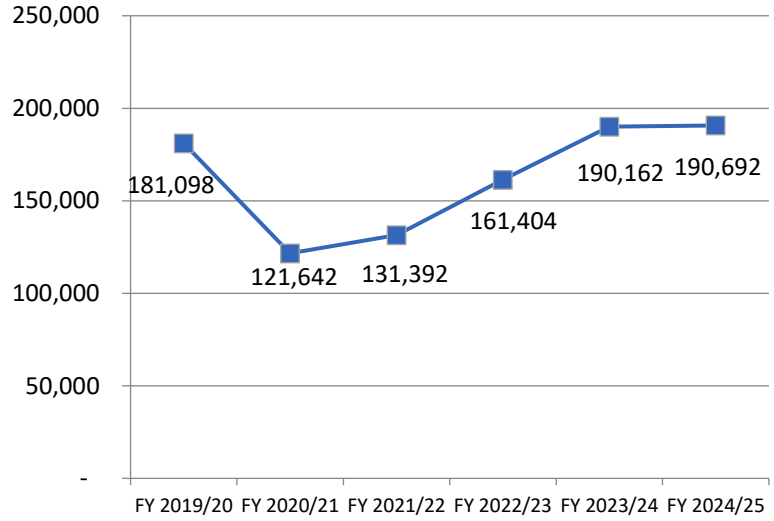


Exhibit 6.14 Fixed-Route Operating Cost/VSH

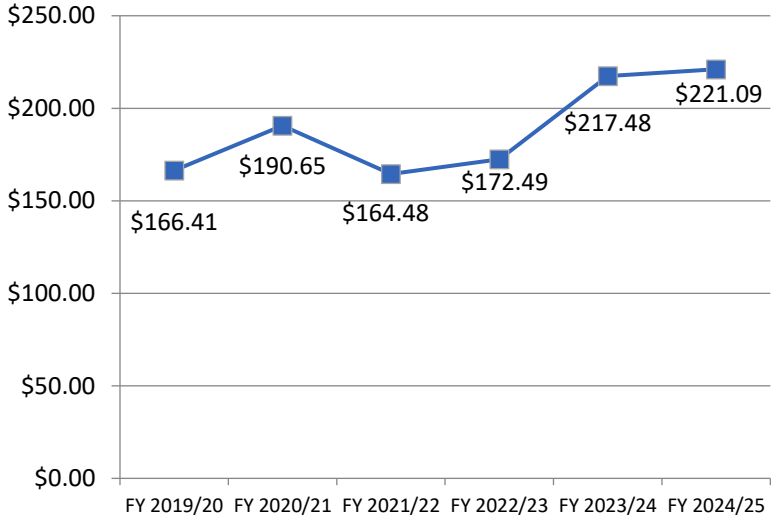


Exhibit 6.15 Fixed-Route Operating Cost/VSM

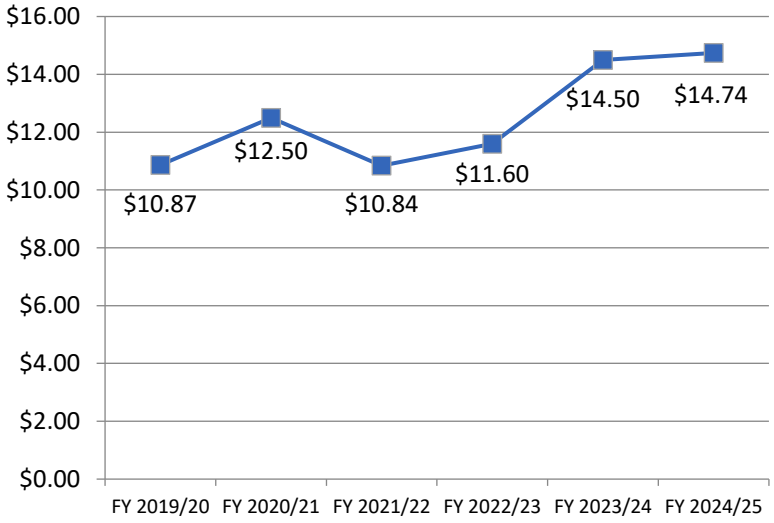


Exhibit 6.16 Fixed-Route VSM/VSH

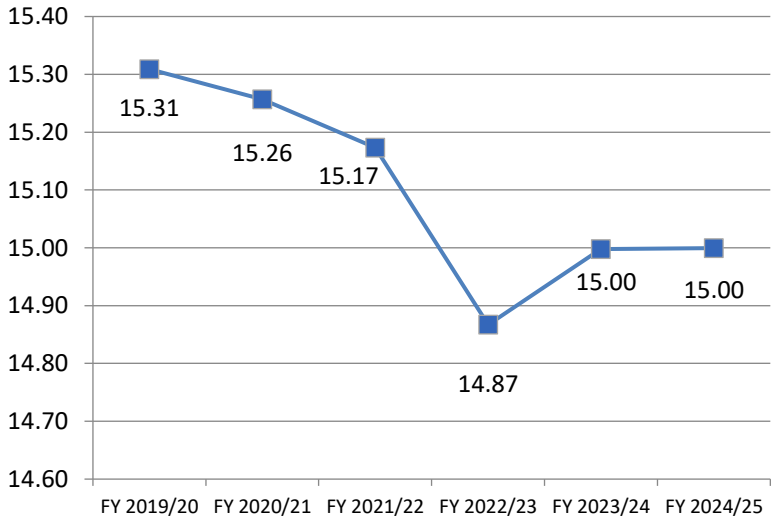


Exhibit 6.17 Fixed-Route Operating Cost/Passenger

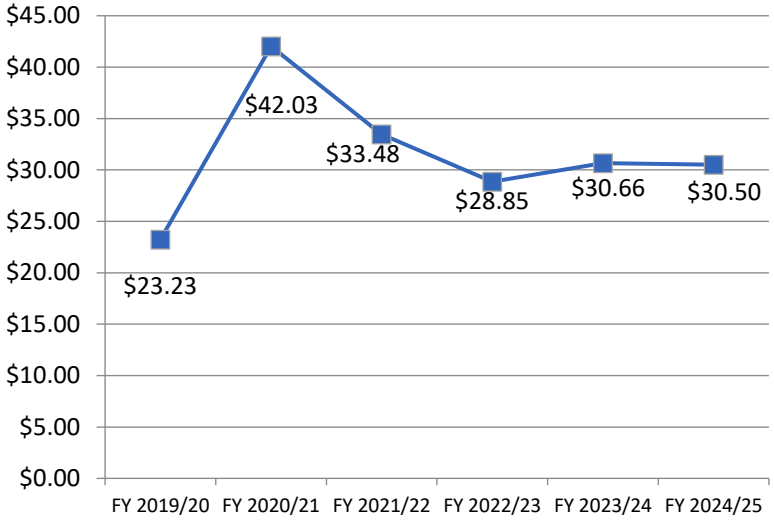


Exhibit 6.18 Fixed-Route Passengers/VSH

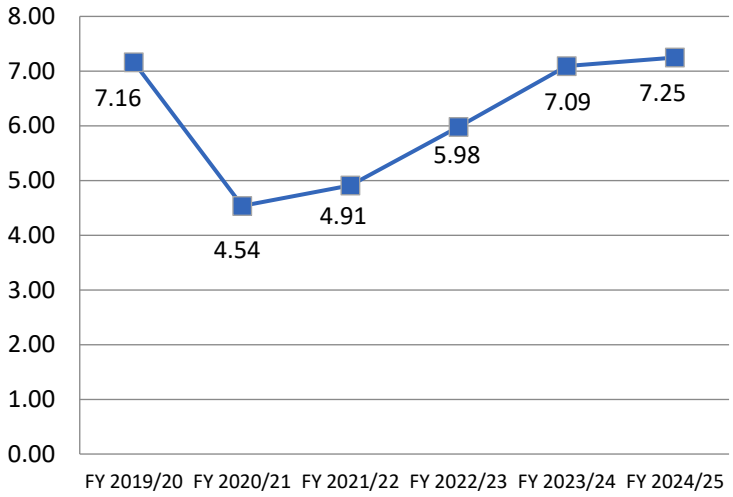


Exhibit 6.19 Fixed-Route Passengers/VSM

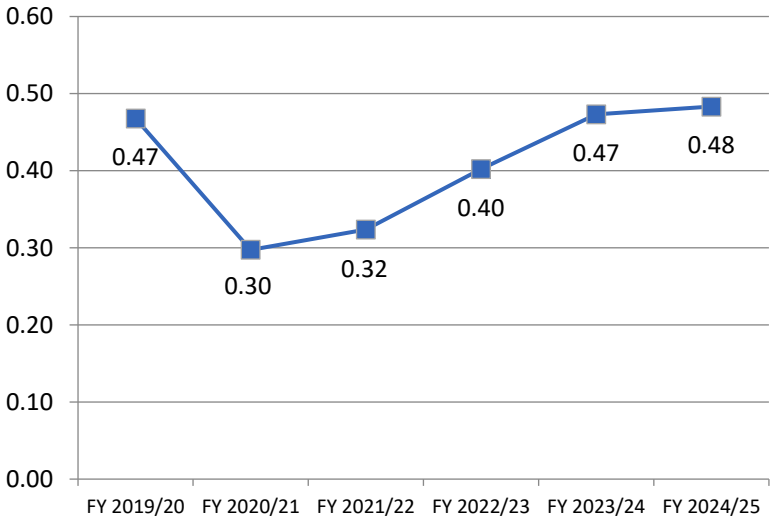


Exhibit 6.20 Fixed-Route VSH/FTE

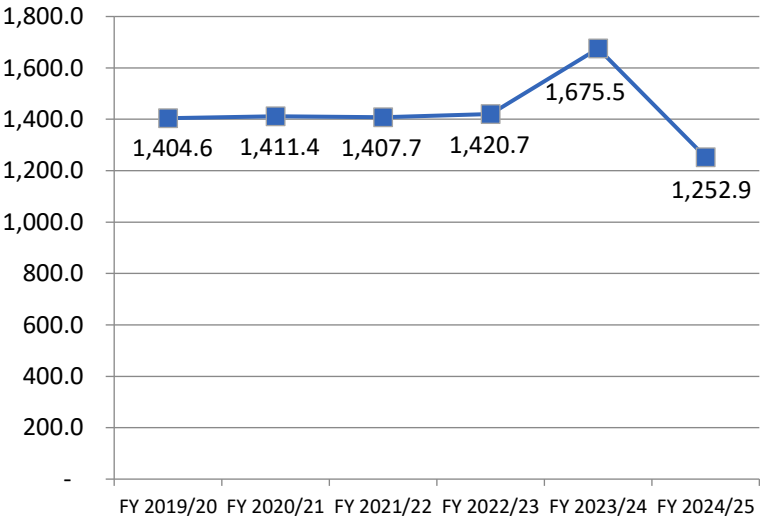


Exhibit 6.21 Fixed-Route Farebox Recovery

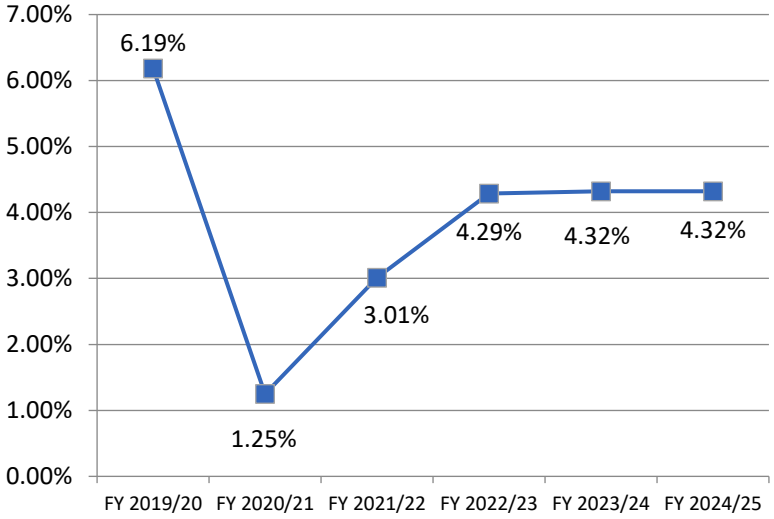
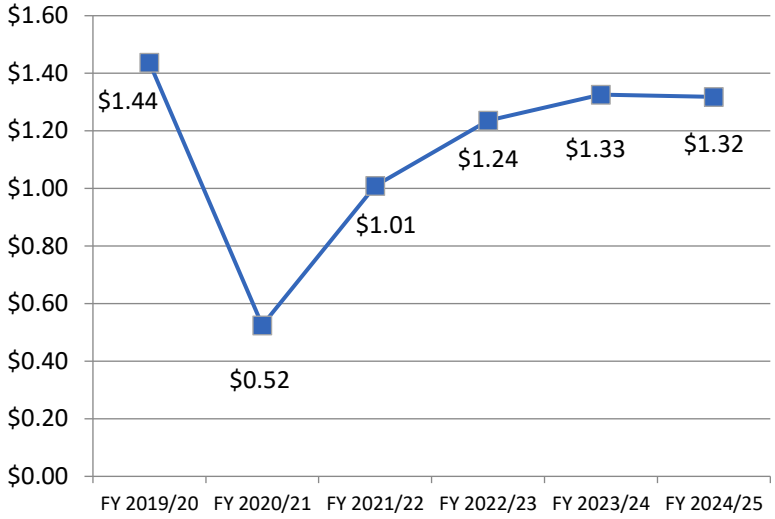


Exhibit 6.22 Fixed-Route Fare/Passenger



Demand-Response Performance Trends

Demand-response operating cost experienced a net 6.6 percent increase during the audit period, and a net 3.2 percent increase across the last six years. Fare revenue significantly increased during the six-year period, especially after FY 2020/21. This resulted in a net 3.8 percent increase during the audit period and a net 9.9 percent increase over six years.

Vehicle service hours (VSH) increased each year of the six-year period with the exception of FY 2020/21. This resulted in a net 11.4 percent increase during the audit period and a net 24.6 percent decrease during the six-year period. Vehicle service miles (VSM) experienced the same pattern with the exception of a slight decrease in FY 2024/25 (1.1 percent). This resulted in a net 6.1 percent increase during the audit period and a net 10.9 percent increase during the six-year period. Ridership rose during four years of the six-year period, though the most significant increases did not occur until FY 2021/22 and FY 2022/23 during the recovery efforts from COVID-19. This led to a 13.1 percent net decrease during the audit period, but a 26.2 percent net increase across the six-year period.

Cost-related metrics were mixed, with operating cost per VSH decreasing 4.3 percent while operating cost per passenger increased 22.7 percent and operating cost per VSM increased 0.5 percent during the audit period. Passenger-related metrics declined during the audit period, with passengers per VSH decreasing by 22.0 percent and passengers per VSM decreasing by 18.1 percent.

Exhibit 6.23 Demand-Response Performance Indicators

Performance Measure	Demand-Response					
	FY 2019/20	FY 2020/21	FY 2021/22	FY 2022/23	FY 2023/24	FY 2024/25
Operating Cost (Actual $)	$3,076,034	$2,161,238	$2,289,336	$2,976,827	$3,169,717	$3,174,106
Annual Change		*-29.7%*	*5.9%*	*30.0%*	*6.5%*	*0.1%*
Fare Revenue (Actual $)	$78,470	$8,958	$48,036	$83,053	$91,990	$86,221
Annual Change		*-88.6%*	*436.2%*	*72.9%*	*10.8%*	*-6.3%*
Vehicle Service Hours (VSH)	13,205	5,790	7,807	8,932	9,877	9,953
Annual Change		*-56.2%*	*34.8%*	*14.4%*	*10.6%*	*0.8%*
Vehicle Service Miles (VSM)	121,557	71,397	104,842	127,077	136,283	134,795
Annual Change		*-41.3%*	*46.8%*	*21.2%*	*7.2%*	*-1.1%*
Passengers	33,407	22,934	35,893	48,652	49,085	42,278
Annual Change		*-31.3%*	*56.5%*	*35.5%*	*0.9%*	*-13.9%*
Employees	21	18	14	14	11	21
Annual Change		*-14.3%*	*-22.2%*	*0.0%*	*-21.4%*	*90.9%*
Performance Indicators						
Operating Cost/VSH (Actual $)	$232.94	$373.27	$293.24	$333.28	$320.92	$318.91
Annual Change		*60.2%*	*-21.4%*	*13.7%*	*-3.7%*	*-0.6%*
Operating Cost/Passenger (Actual $)	$92.08	$94.24	$63.78	$61.19	$64.58	$75.08
Annual Change		*2.3%*	*-32.3%*	*-4.1%*	*5.5%*	*16.3%*
Passengers/VSH	2.53	3.96	4.60	5.45	4.97	4.25
Annual Change		*56.6%*	*16.1%*	*18.5%*	*-8.8%*	*-14.5%*
Passengers/VSM	0.27	0.32	0.34	0.38	0.36	0.31
Annual Change		*16.9%*	*6.6%*	*11.8%*	*-5.9%*	*-12.9%*
Farebox Recovery	2.6%	0.4%	2.1%	2.8%	2.9%	2.7%
Annual Change		*-83.8%*	*406.2%*	*33.0%*	*4.0%*	*-6.4%*
Hours/Employee	628.8	321.7	557.6	638.0	897.9	474.0
Annual Change		*-48.8%*	*73.4%*	*14.4%*	*40.7%*	*-47.2%*
TDA Non-Required Indicators						
Operating Cost/VSM	$25.31	$30.27	$21.84	$23.43	$23.26	$23.55
Annual Change		*19.6%*	*-27.9%*	*7.3%*	*-0.7%*	*1.2%*
VSM/VSH	9.21	12.33	13.43	14.23	13.80	13.54
Annual Change		*34.0%*	*8.9%*	*5.9%*	*-3.0%*	*-1.8%*
Fare/Passenger	$2.35	$0.39	$1.34	$1.71	$1.87	$2.04
Annual Change		*-83.4%*	*242.6%*	*27.6%*	*9.8%*	*8.8%*

Sources: FY 2019/20 – FY 2021/22 data from prior audit. FY 2022/23 – FY 2024/25 data from State Controller Reports.

Exhibit 6.24 Demand-Response Ridership

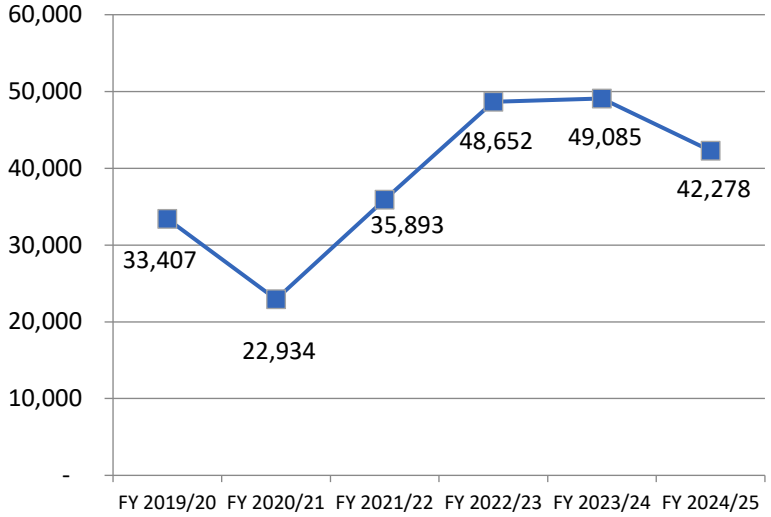


Exhibit 6.25 Demand-Response Operating Cost/VSH

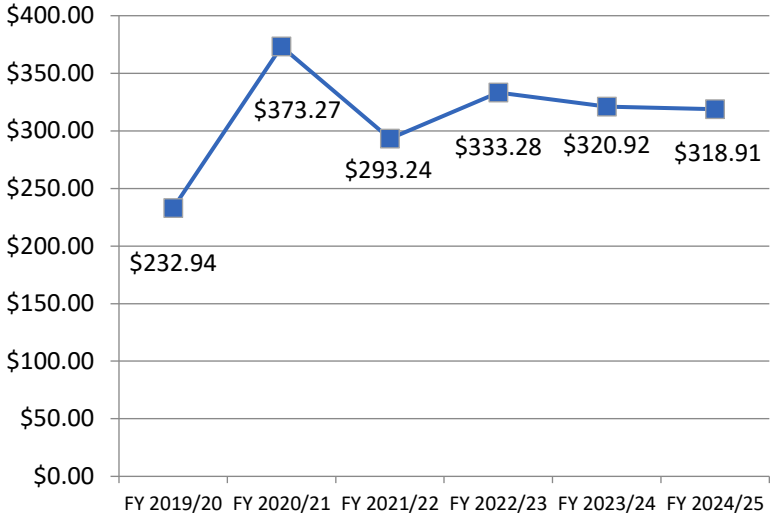


Exhibit 6.26 Demand-Response Operating Cost/VSM

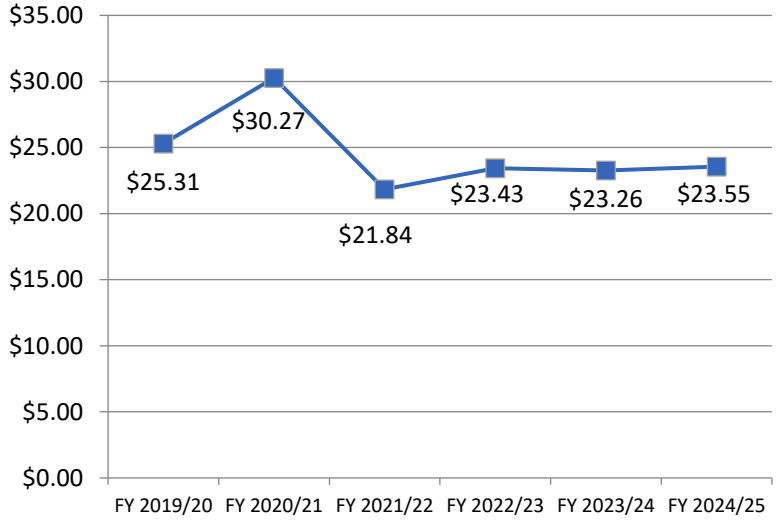


Exhibit 6.27 Demand-Response VSM/VSH

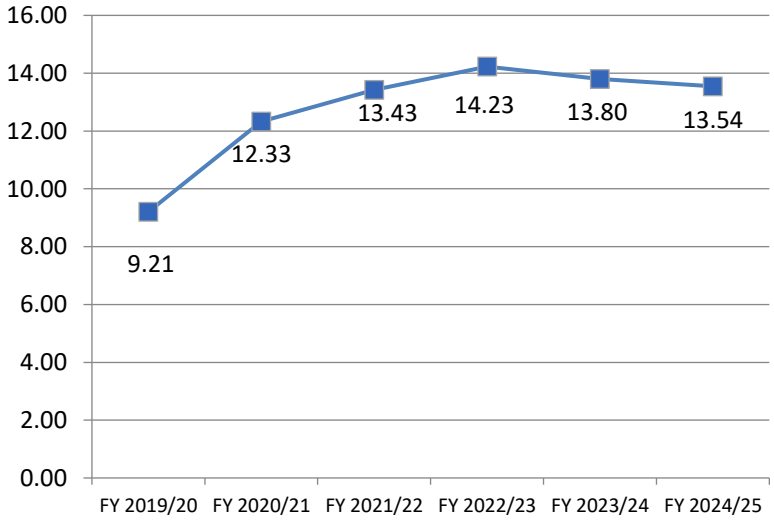


Exhibit 6.28 Demand-Response Operating Cost/Passenger

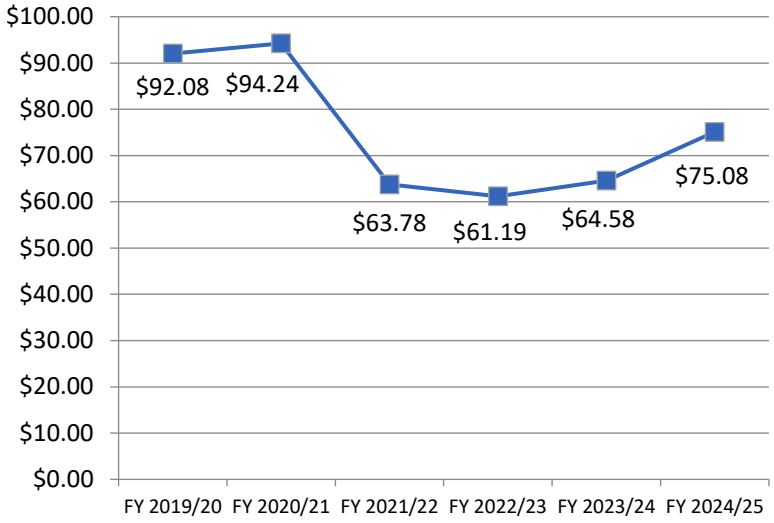


Exhibit 6.29 Demand-Response Passengers/VSH

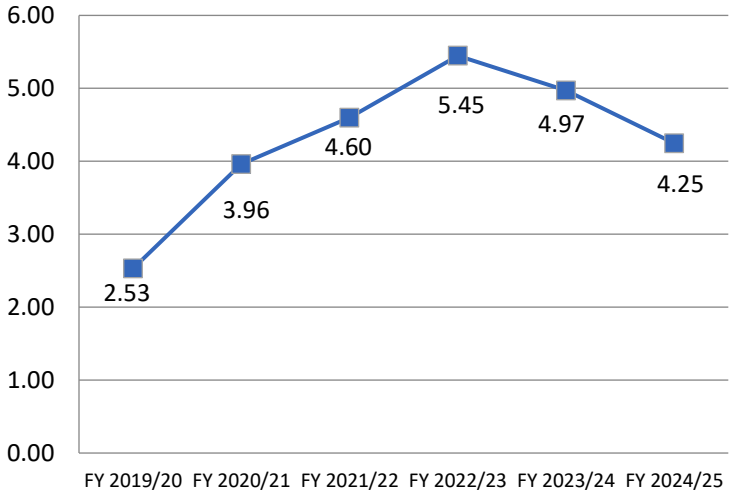


Exhibit 6.30 Demand-Response Passengers/VSM

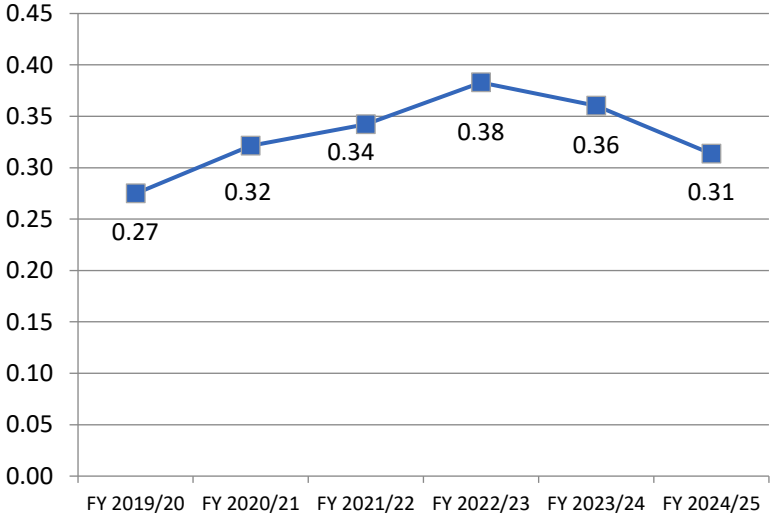


Exhibit 6.31 Demand-Response VSH/FTE

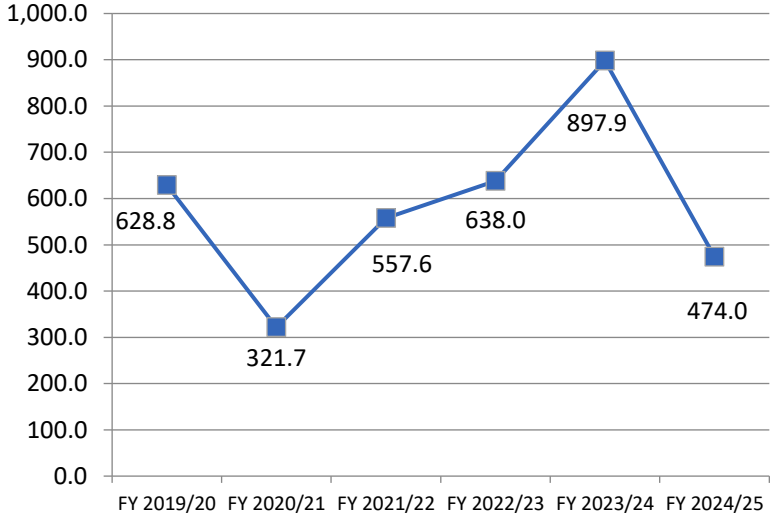


Exhibit 6.32 Demand-Response Farebox Recovery

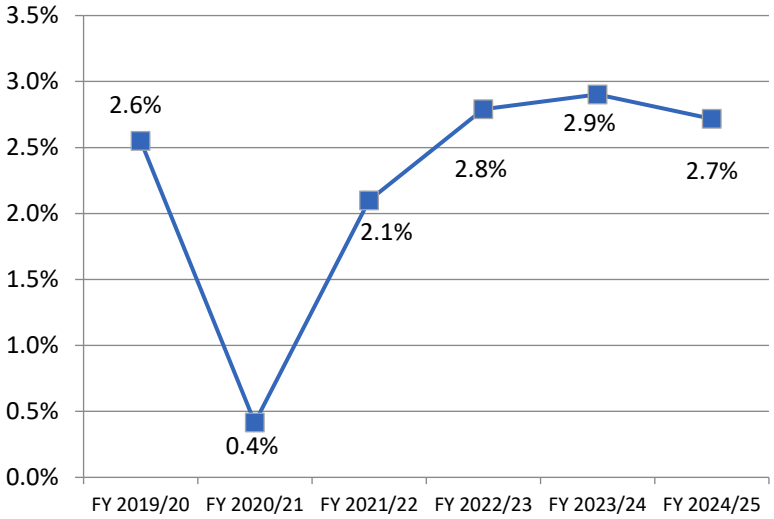
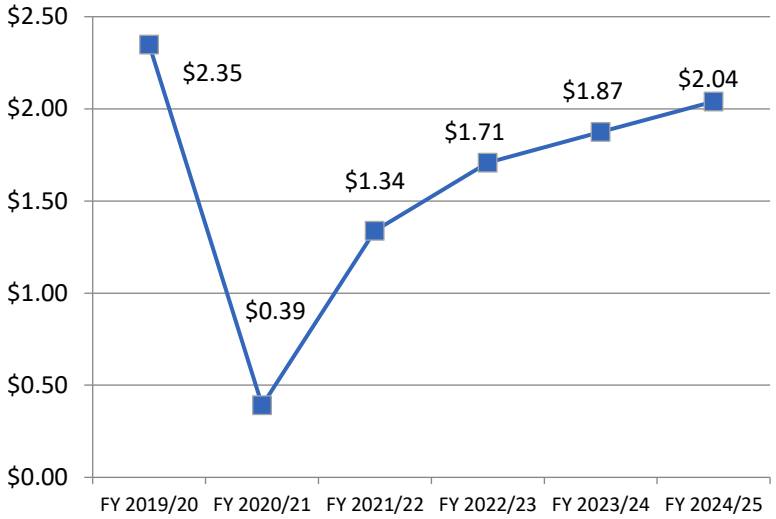


Exhibit 6.33 Demand-Response Fare/Passenger



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Chapter 7 | Functional Review

A functional review of the City of Simi Valley's public transit program is intended to assess the effectiveness and efficiency of the operator. Following a general summary of the City's transit services, this chapter addresses seven functional areas. The list, taken from Section III of the *Performance Audit Guidebook* published by Caltrans, reflects those services provided by the City through its transit program:

- General management and organization;
- Service planning;
- Administration;
- Marketing and public information;
- Scheduling, dispatch, and operations;
- Personnel management and training; and
- Maintenance.

Service Overview

The City of Simi Valley, located in eastern Ventura County, provides public transit service consisting of three fixed routes and an ADA/senior Dial-A-Ride service within Simi Valley city limits. Route 10 also serves Moorpark College and the Chatsworth Metrolink Station. The service operates Monday through Saturday (excluding designated holidays). Hours of operation are 5:30 a.m. to 8:00 p.m.

The City's Dial-A-Ride program is a shared-ride, curb-to-curb service for ADA-certified individuals as well as seniors age 65 and above. Prospective riders must complete a Dial-A-Ride application in order to be eligible for the service. The service area for the ADA/Paratransit Dial-A-Ride (DAR) is defined as a three-quarter mile corridor along the Simi Valley Transit fixed-route bus lines.

During the audit period, the City launched the Simi Valley Transit On Demand service as a pilot program. SVT On Demand is a flexible rideshare same-day service (microtransit). The service operates 8:30 a.m. to 6:00 p.m., Monday through Friday. SVT On Demand picks up and drops off at designated locations within five zones: the primary service zone (shown in green) and secondary zones including Adventist Health, Civic Center, Simi Valley Train Station, and Moorpark College. Trips can be booked online via the RideCo app (book.svt.rideco.com) or by phone.

The current fare structure for fixed-route service is shown in Exhibit 7.1, while Exhibit 7.2 details the Dial-A-ride fare structure. Upon request, the City also provides transfers to Ventura County Transportation Commission's Intercity Bus. College students and youth, age 18 and under, ride any public transit bus in Ventura County free for the school year. Students must show their school ID.

Passes may be purchased at City Hall and most middle and senior high schools. Riders may also purchase trips and passes using the City's mobile ticketing app, Token Transit, as well as use stored value and passes on the VCbuspass through the county-wide ticketing app, Umo.

Exhibit 7.1 Fixed-Route Fare Structure

Fare Category	Base Price	VCbuspass 31-day pass Zone 1
Full Fare		
Single trip	$1.50	N/A
Youth (up to age 18)	Free	N/A
College students	Free	N/A
21-Ride Pass	$25.00	N/A
Unlimited Day Pass	$5.00	N/A
Unlimited Monthly Pass	$50.00	$50.00
Reduced Fare		
Single trip	$0.75	N/A
25-Ride Pass	$15.00	N/A
Unlimited Day Pass	$2.50	N/A
Unlimited Monthly Pass	$25.00	$25.00

Exhibit 7.2 Demand-Response Fare Structure

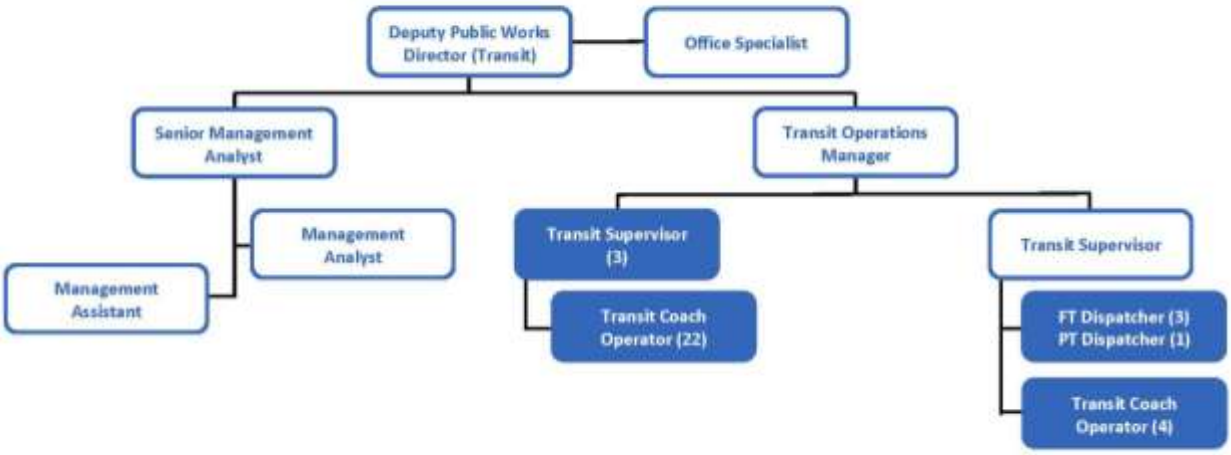
Fare Category	Price
ADA/Dial-A-Ride	
Single trip (one-way)	$2.00
Personal Care Attendant (PCA) (w/ ADA-certified rider)	Free
10-ride book of passes	$20.00
Out-of-area service (one-way) (ECTA)	$8.00
SVT On Demand	
Single trip (general)	$4.00
Single trip (Seniors (65+) and Disabled Persons)	$3.00
Single trip (Child 5 years or younger with paying rider over 16)	Free

General Management and Organization

The Simi Valley City Council is the governing body for the City's transit program. The City Council meets at 6:30 p.m. on Monday at City Hall (2929 Tapo Canyon Road) typically twice monthly. The City's transit system is a division of the City of Simi Valley's Community Services Department. The Transit Division occupies the Transit Maintenance Facility, located at 490 West Los Angeles Avenue. The Division is managed by the Deputy Public Works Director (Transit), supported by a Senior Management Analyst, Management Analyst, Management Assistant, and Transit Operations Manager. The Transit Operations Manager is supported by four Transit Supervisors who oversee drivers, dispatchers, and Transit Operations Assistants. Fleet maintenance lies under the Deputy Public Works Director (Maintenance Services).

The City's Transit organizational chart is included as Exhibit 7.3.

Exhibit 7.3 Organizational Chart



The City's transit program is organized effectively and staffed appropriately. However, it continues to experience a shortage of drivers.

The City's Transit Supervisors monitor performance measures on a daily basis. Fixed-route metrics include ridership, farebox, and on-time performance. Demand-response metrics include trip denials, productivity, missed trips/no-shows, and additional resources needed to meet demand. The City uses Syncromatics and Ecolane software to track performance. In-service evaluations of drivers/ride-alongs are conducted biweekly.

City staff believe VCTC provides sufficient support and is a valuable resource. The Deputy Director is the primary liaison with other governmental organizations. The City is also a member of the California Association for Coordinated Transportation (CalACT), California Transit Association (CTA), and American Public Transportation Association (APTA).

The City is proud of its advancement of major capital projects and implementation of its microtransit service during the audit period. Its maintenance team is recognized for its strong performance, maintaining the fleet effectively and meeting regulatory requirements, including inspections conducted by the California Highway Patrol.

In addition, the City made significant progress toward its transition to zero-emission, placing several electric vehicles into service over the past eight months. As an early adopter of electric bus technology, the City relied heavily on collaboration and networking with other transit agencies, participating in conferences, vendor discussions, and site visits to other agencies to learn from their experiences and avoid potential challenges.

Finally, staff leadership played an important role in advancing these initiatives, particularly through efforts to secure grants, maintain timely reporting, and proactively manage compliance requirements, helping ensure successful project implementation and minimizing audit findings.

Recent Service Change

In June 2025, the City launched a pilot microtransit program, Simi Valley Transit On Demand (SVT On Demand). SVT On Demand is a flexible, same-day rideshare service with five service zones. Pick-ups and drop-offs are conducted at designated locations within each zone. Trips can be booked through the SVT On Demand app or by phone.

The SVT On Demand program has generally shown positive progress since its implementation. The City conducted community meetings when developing the zones, and the service was designed with a flexible approach, allowing adjustments based on community needs and demands. The City added its newest zone in November 2025, six months after the initial launch. The zones primarily serve areas outside existing fixed-route service to avoid duplicating services with a key drop-off at the Civic Center, which serves as a central hub for the local fixed-route service.

The service is currently being delivered using battery-electric vans. There is some concern that increased demand will exceed the range of the vehicles, though an extra van is available if a mid-day change-out is needed.

At the time of the site visit, the service provided an average of 22-28 trips per day. The City plans to introduce additional service zones to expand coverage. Promotion of the service is ongoing, with robust social media marketing, biweekly ads in local newspapers, community meetings, board presentations, and a reduced-fare offer for the first three months. The two-year pilot is planned to run through June 2027.

Service Planning

The last Short Range Transit Plan (SRTP), completed in 2019, included development of a Transit mission statement, goals, and performance standards for the program. It also included recommendations for a transit management system, staff reductions, cost allocations, and technology, in addition to recommendations about routes. The SRTP also included an ADA/Dial-A-Ride service plan, which addressed recent performance for the City's local ADA/Dial-A-Ride program and ECTA CONNECT and included recommendations specific to the demand-response mode. Finally, the SRTP set forth a series of marketing objectives and strategies focusing on maximizing ridership on the revised system. While many elements of the SRTP were implemented in March 2020, it was difficult to evaluate their impact given the changes resulting from the COVID-19 pandemic.

At the time of this report, VCTC was in the process of adopting a county-wide Short Range Transit Plan, which includes recommendations for the City's transit program. The City's primary goal for the new SRTP is to further evaluate and refine its fixed-route system, which is generally performing well, with the exception of concerns related to fares. City staff expressed interest in having more time to assess the impacts of route changes implemented in 2020. Data from the past year has provided a better understanding of the community's preferences, which is outlined in the new SRTP. Additionally, the City believes the fixed-route service and the microtransit service will complement each other. Rider surveys were conducted as part of the SRTP update process.

During the audit period, the City undertook significant fleet replacement and zero-emission vehicle (ZEV) transition planning and ordered 15 total vehicles at one time (including a mix of vans and cutaway buses). The plan is to stagger the deployment of these vehicles by testing four ZEVs on the Dial-A-Ride service and

three on the new SVT On Demand service to evaluate their performance. New fixed-route vehicles are expected to arrive in summer 2026.

At present, the City is using portable chargers to fuel its electric fleet. To further support the transition to ZEVs, the City is hiring a consultant to assist with system design and implementation of charging infrastructure. Three phases are envisioned for this transition: 1) seven chargers for Dial-A-Ride and microtransit vehicles, 2) full infrastructure for six electric fixed-route buses, and 3) 100 percent conversion to electric (including elimination of all CNG fueling and the installation of additional chargers). The City also plans to have pantograph overhead chargers at the transit center.

Administration

The transit budget is handled by the Senior Management Analyst in communication with the Deputy Public Works Director (Transit). The Senior Management Analyst analyzes the current budget, year-to-date actual expenses, and prior year actual expenditures to develop projections for the current year and budget for the upcoming year. Policy items that require special approvals, such as vehicle purchases, personnel changes, and technology upgrades, are discussed and forwarded to appropriate approvers. Once the preliminary expense budget is complete, the Deputy Public Works Director (Transit) reviews it before it is sent to Public Works Administration for further processing and review. The Senior Management Analyst conducts a thorough analysis of existing capital projects and, in collaboration with the Deputy Public Works Director (Transit), proposes a capital project budget to be reviewed by the Public Works Administration. Once the Senior Management Analyst and Deputy Public Works Director (Transit) submit the final revenue budget for review, the finalized budget is sent to City Council for approval and adoption. Any changes to the budget (whether between line items or to add funds) following adoption must be approved by the City Council. Finance provides monthly year-to-date budget reports to the City Council. Financial data is tracked using Munis software.

Grants are handled by the Senior Management Analyst, Management Analyst, and Fiscal Services. The City actively pursues discretionary grants based on its operational and capital needs. Staff review grant projects and expenses every time they process an invoice.

The City's Risk Management department oversees insurance and risk management. Transit reports all accidents and injuries immediately, whether a claim is filed or not. The report is then sent to the City's risk management department. Transit provides supporting information, videos, etc. for any claims that are filed. Vehicles have onboard cameras for added security.

The Operations Manager is responsible for reviewing the City's safety practices on at least a quarterly basis. Transit's role in the City's emergency plan is well-defined; the Deputy Public Works Director (Transit) serves as one of the emergency services leads and attends quarterly meetings with the emergency response team. The City participates in both VCTC's Countywide Transportation Emergency Preparedness Plan (TEPP) and the State of California's Transit Mutual Assistance Compact (TransMAC).

The Public Works Maintenance Division is responsible for maintaining the transit facility. A contractor is utilized to maintain bus stops.

Payroll is processed through Executime, with Supervisor approval of timesheets submitted by employees. All employees utilize direct deposit.

The City maintains a procurement manual, which is updated to reflect changes to regulations and other requirements. Purchases and contracts over $175,000 must utilize a formal sealed bid process for supplies, equipment, maintenance services, and public projects, all of which are awarded by the City Council. The City ensures compliance with FTA guidance for FTA-assisted projects by following the Municipal Code Purchasing Ordinance, Transit Procurement Policies, which incorporate federal requirements. Staff involved in procurement attend federal procurement workshops and training sessions to stay updated on FTA regulations. The City also utilizes the National Rural Transit Assistance (RTAP) as a reference to further ensure compliance with FTA guidance. All procurements are documented and reviewed to confirm they meet FTA standards and requirements.

When appropriate, the City may participate in cooperative purchasing of items of major expense, such as vehicles, due to the complexity of the solicitation process.

Marketing and Public Information

The City utilizes multiple channels for marketing and public information, including media releases, websites, city newspaper, onboard notices, Rider Guides, and outreach to community partners. Transit has been more present in the community since the pandemic, including City events and City email blasts. The City has worked with local schools and the Youth in Government committee to promote the countywide Youth Ride Free program. The City uses several mobile applications for ticketing and/or real-time bus tracking, including RideCo (microtransit), Ecolane (ADA), and the GoVCBus app (fixed-route).

All calls are logged. Customer concerns/complaints are documented and escalated as necessary. Driver issues are routed to the driver's supervisor, with the operations manager and Deputy Public Works Director copied, and the driver is brought in for counseling. Complainants are contacted within 48 hours. Public perception of Simi Valley Transit is generally positive.

Scheduling, Dispatch, and Operations

Simi Valley Transit is operated in-house. Service is currently staffed by 22 full-time drivers and five part-time drivers. To be fully staffed, there would need to be 28 full-time drivers and seven part-time drivers. At the time of the site visit, the City had hired three new drivers, who were undergoing training. Employees are represented by Service Employees International Union (SEIU) Local #721. Drivers bid on schedules two times per year, with assignments based on seniority. Part-time drivers bid on part-time shifts; they typically do not want to work full time. Both full-time and part-time drivers receive the same licensing and certifications.

Absences, whether scheduled vacations or call-outs, utilize drivers who signed up for extra assignments on their off days. Supervisors may also be assigned to cover a driver shift. Drivers must give one hour notice for unplanned absences.

Vehicles are assigned after maintenance produces its daily hold list. Fixed-route vehicles are rotated through routes and drivers. Downed vehicles are communicated effectively on a daily basis via email. Mechanics can pull vehicles from service if they do not meet operability requirements.

The City uses GFI Genfare fareboxes on its fixed-route buses, with which drivers manually enter the fare type when riders board. Paratransit vehicles use Diamond drop-style fareboxes. At the end of each shift, transit supervisors pull the secured fareboxes and Dial-A-Ride vaults from vehicles and place them in the

secure cash room. The cash room features controlled access and is monitored by cameras. Two dispatchers count fare revenue. The money is then stored in the safe, which is only accessible by supervisors. An armored car picks up the money twice a week and delivers to the bank. Dial-A-Ride fares are reconciled against trip manifests. Bank deposits are monitored against unclassified fares.

Fixed-route fare media is sold at City Hall and the Transit Maintenance Facility (with an appointment). One-day passes are sold onboard the bus. Credit card payments are processed into the transit account. Mobile ticketing is offered through Token Transit and Umo. Token Transit has been working well for several years. Umo is the county-wide contactless app that is part of the VCbuspass program.

Personnel Management and Training

As noted earlier, the City is not currently recruiting enough drivers to meet its needs. At the time of the site visit, there were several openings for full-time and part-time drivers. This shortage has not resulted in any lost service, as fixed-route assignments are staffed first and Dial-A-Ride is staffed with the remaining drivers. At present, overtime is being paid to cover the daily routes, and drivers do not seem to be getting burned out. It helps that the service does not operate on Sunday, so everyone gets at least one day off per week.

Drivers are recruited using City online postings and employee referrals. So far employee referrals have been the most effective.

Until recently, driver candidates had to already possess a Class B commercial driver's license with the proper endorsement. Given they were not getting any candidates, the City revisited this requirement and is now advertising for recruits with a Class C license and a good driving record. Recruitment has increased since this change. Training new drivers through commercial licensing takes longer, typically between eight and ten weeks, although this could be as little as seven weeks.

One of the biggest motivators for employees is that the transit program is operated in-house. All employees are eligible for City benefits, which are typically better than those offered by contracted operations. However, the City also notes that increasing pay would also make it more competitive. Supervisors motivate employees through open communication, recognition, consistent scheduling, and support. Turnover has been minimal; one strategy used by the City was to offer full-time employment to any part-time drivers who wished to do so.

The City also strives to engage in meaningful dialogue with its drivers. Formal communications are provided during annual performance evaluations, which have been the subject of positive comments from drivers.

Comprehensive training is capable of taking an inexperienced driver all the way through commercial licensing. Training includes 40 hours in the classroom, 30 hours on the vehicle, 30 hours behind-the-wheel, and 10 hours cadetting for an experienced recruit. Transit Supervisors are responsible for all training. The local DMV is used for commercial license testing. Ongoing training (such as refresher training, defensive driving, and incident training) exceeds state requirements. The safety program is overseen by transit management and designated safety staff. Mandatory safety meetings are conducted on a monthly basis.

Full-time drivers receive a full benefits package, including health insurance, dental and vision insurance, life insurance, retirement, health accounts, employee assistance program, tuition reimbursement, alternative work schedule, annual leave, and holidays. Part-time drivers receive prorated benefits. Drivers receive proportionate benefits based on hours worked. There is no threshold for receiving the benefit adjustment; anything above their full-time status is compensated. Benefits are detailed in the employee handbook.

Maintenance

The City's Transit Maintenance Facility (490 West Los Angeles Avenue) is a certified LEED-Gold building which realized a 25 percent energy savings following renovations in 2011. The City's renovations included a CNG fueling facility that enables the City to sell fuel to other fleet operators, including the City of Moorpark, Simi Valley Unified School District, and a local waste management company.

The City provides a combination of in-house and contracted (vendor) maintenance services. In-house maintenance staff is generally capable of doing all maintenance tasks with the exception of specialized or time-consuming repairs such as air conditioning on the fixed-route buses, fire suppression systems, major engine repairs, and body damage, which are outsourced to dealers or local vendors.

The City's preventive maintenance program includes monthly inspections, pre- and post-trip driver inspections, and servicing every 6,000 miles. This schedule complies with manufacturers' recommended schedules. Other issues are addressed based on need. Maintenance staff can reschedule preventive maintenance to optimize vehicle availability. The City tracks all maintenance work on Excel, though there has been ongoing discussion at the City level regarding future procurement of an asset management software program.

The Transit Maintenance Building is a dedicated facility, with dedicated maintenance staff, and is sufficient for the current transit fleet, including three bays, two lifts, and a pit. Staff would like to see additional storage space for tools and parts, especially for the electric buses. The most challenging aspect of fleet maintenance during the audit period was getting warranty repairs from one of the vendors.

The facility features a parts room which is secure and accessible by all maintenance personnel. All parts are labeled and inventory is sufficient to minimize downtime. Only large parts are currently tracked. Should the City procure an asset management software program, it would also be used to track parts.

Maintenance schedules are repeatedly communicated to dispatch. Should an unsafe vehicle be identified, it is tagged out and marked on the fleet status board, and dispatch is notified. If there is any doubt to a vehicle's soundness, it is kept out of service.

All vehicles are equipped with AVL, APC, radio, and surveillance cameras. While technology issues arose during the audit period, the City notes the impact was minimal, as any issues were identified and addressed quickly. Temporary disruptions did not significantly affect daily operations, service delivery, or data collection because corrective action was taken immediately.

The City's fleet is summarized in Exhibit 7.4.

Exhibit 7.4 Simi Valley Transit Fleet

Year	Make/Model	Length	Capacity	Fuel type	Mode	Qty
2014	New Flyer	40’	35/2 WC	CNG	Fixed-route	3
2014	New Flyer	35’	32/2 WC	CNG	Fixed-route	3
2020	New Flyer	35’	32/2 WC	CNG	Fixed-route	3
2024	New Flyer	35’	32/2 WC	CNG	Fixed-route	2
2025	Ford Allstar	25.5’	16/2 WC	CNG	ADA/DAR	8
2024	Ford GameChanger	21.95’	8/1 WC	EV	ADA/DAR	4
2024	Ford GameChanger	21.95’	6/1 WC	EV	Microtransit	3
2020	Ford Fusion	-	5/0 WC	Hybrid	Relief	5
2022	Chrysler Voyager	-	6/2 WC	Gas	Supervisor	1
2023	Ford Escape	-	5/0 WC	Hybrid	Supervisor	1

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Chapter 8 | Findings and Recommendations

Conclusions

The City of Simi Valley is found to be in compliance with the Transportation Development Act (TDA). One recommendation intended to improve the effectiveness and efficiency of the operator is detailed below.

Findings

Based on discussions with City staff, analysis of program performance, and an audit of program compliance and function, the audit team presents no findings related to compliance with the TDA.

Program Recommendations

Recommendations are intended to assist in bringing the operator into compliance with the requirements and standards of the TDA as well as address non-compliance-related issues, challenges, or opportunities observed during the site visit and functional review. The following recommendation is presented for the City of Simi Valley.

Recommendation 1: The City should continue its efforts to fully staff its driver workforce.

Discussion: At the time of the site visit, the City was understaffed by several full-time and part-time drivers. While this was not having an adverse effect on daily operations, being chronically understaffed can lead to burnout among drivers, resulting in more call-outs and turnover. One thing the City has in its favor is the fact that it does not operate on Sunday, which helps by providing every driver with at least one guaranteed day off per week.

Contributing Factor(s): Fully staffing the driver workforce also enables the City to react to changes to the status quo. While daily operations may be relatively easily covered now, that may not be the case if too many drivers call out sick, for example. Such events can be very stressful for those who must scramble to cover routes, and such a practice is not sustainable for long. When the driver workforce is fully staffed, there is much more flexibility to react to the unexpected.

Recommended Action: Continue to recruit for open driver positions, with a goal of filling all full-time and part-time positions by the end of fiscal year 2026/27.

Timeline: FY 2026/27.

Anticipated Cost: Should be included in existing budget for recruitment, training, and salaries of new drivers.

Exhibit 8.1 Audit Recommendations

Recommendations		Importance	Timeline
1	The City should continue its efforts to fully staff its driver workforce.	High	FY 2026/27

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