



**PROJECT INITIATION CHARTER**  
**TRANSIT ONLY LANE DEMONSTRATION PROJECT I-805 and SR-94**  
(Adopted May 7, 2019)

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**Purpose**

The purpose of this project charter is to establish a mutual understanding among the project agency stakeholder partners regarding the Transit Only Lane (TOL) Demonstration Project on State Route (SR) 94 and Interstate (I-) 805 ("Project"). The Project is led by SANDAG in partnership with Metropolitan Transit System (MTS), the California Department of Transportation (Caltrans), California Highway Patrol (CHP), and U.S. Department of Transportation (USDOT). This charter describes the Project, the scope of work, and the roles and responsibilities of stakeholder partners in the project. Partners in this charter agree to the project scope, the schedule, and commit to work together for a successful demonstration project.

**Project Stakeholders**

The following project stakeholders have been key members in the development of the project charter:

Caltrans – Gustavo Dallarda – Deputy District Director, District 11

CHP – Captain Jim Nellis

MTS – Mike Daney – Manager of Contracts Operations and Passenger Facilities

SANDAG – Jennifer Williamson, Principal Transportation Planner

**Project Overview**

The Project is envisioned to deliver an innovative demonstration of TOL operations on seven miles of existing freeways using state-of-the-art technology for driver assistance and vehicle to infrastructure communications. The Project is anticipated to improve schedule reliability by allowing authorized transit buses to drive on the freeway shoulder by converting it to a TOL, during specific operating conditions, with minimal physical improvements to the roadway. Safety will be improved by vehicle-to-infrastructure communications allowing transit vehicles to hold ramp meters when the bus is approaching a conflict zone. The Project is proposed along I-805 between SR-54 and SR-94, and along SR-94 between I-805 and downtown San Diego and will be implemented in phases. Caltrans is preparing and approving an Engineering Document (a.k.a. Decision Document) that describes the projects parameters, phasing, technology features, highway modifications and schedule in detail.

Minor improvements to the existing shoulders may be required, such as re-striping, signage, concrete barrier modification, drainage, shoulder pavement improvements, and minor widening in limited locations. Additional technology will be installed at each ramp meter for vehicle-to-infrastructure communications. Improvements are expected to be entirely within the existing freeway right-of-way.

## I-805 and SR-94 Project Development Map



### Project Operations

The Project will focus on TOL operations during periods of traffic congestion at slow operating speeds. MTS *Rapid* vehicles may utilize designated freeway shoulders/Transit Only Lanes when freeway speeds fall below 35mph, and may travel up to 15 mph faster than the adjacent general-purpose lane not to exceed 35mph. Based on existing traffic conditions, bus operation on the TOL will occur on a daily basis, Monday through Friday between 5:00 AM to 9:00 AM (northbound/westbound) and 3:00 PM to 7:00 PM (eastbound/southbound).

Four buses per hour are anticipated to operate in the TOL during the periods defined above. MTS *Rapid* vehicles will not be eligible to use the TOL during periods of rain (any visible wetness on the vehicle or roadway), during periods of freeway closures, when notified by CHP of an incident in the roadway, or as otherwise agreed upon by the Stakeholder Committee. The converted shoulders along I-805 and SR 94 will remain available for traditional shoulder functions; therefore, South Bay *Rapid* vehicles operating in the TOL must yield to:

- Emergency response vehicles
- Enforcement and maintenance vehicles
- Parked vehicles
- Debris

At any point during the project, the Caltrans District Director has the authority to stop bus operations in the TOL.

### **Project Schedule Milestones**

- Spring 2017 – Begin Technology Package
- Summer 2018 – Signed Final Decision Document
- Summer 2019 – PS&E Package and Bid Ready Construction Package
- Fall 2019 – Training
- Early 2020 – Start of Operation for TOL.
- Early 2023 – Completion of demonstration project.

### **Project Goals and Evaluation**

The primary Project objective is to demonstrate the feasibility of buses using shoulders and the value of integrating technology into TOL operations. Authorizing MTS South Bay *Rapid* buses to use the TOL will improve service reliability for customers. Transit signal priority and driver assistance feedback warnings will improve safety of TOL operations. Higher travel time reliability and safe operation of the bus in the TOL are expected to improve customer experience along this critical regional corridor.

#### **Project Goals**

- Demonstrate the operational feasibility of transit vehicles using freeway shoulders to bypass congestion.
- Demonstrate the use of technology to support the operation of transit buses along freeway shoulders.
- Determine the impact of transit vehicles utilizing freeway shoulders as TOL's.
- Demonstrate the effectiveness of transit operation in the TOL (e.g., on-time performance, increased vehicles speed, ridership).

#### **Agency Goals**

- Provide transit service to address unmet travel demand by providing planned high-speed transit service between population and employment centers between the Otay Mesa POE, eastern Chula Vista and Downtown San Diego as defined in the 2050 Regional Transportation Plan: Our Region. Our Future. and its Sustainable Communities Strategy (2050 RTP/SCS), the City of Chula Vista General Plan update, and the final Otay Mesa-Mesa de Otay Binational Corridor Strategic Plan.
- Provide a high-speed, direct, reliable, pedestrian accessible, and convenient transit service to connect residential areas with employment and major activity centers utilizing the Bus Rapid Transit guideway network in eastern Chula Vista and transit infrastructure at the Otay Mesa POE and in Downtown San Diego.
- Provide a transit system consistent with adopted local and regional plans and policies and related environmental documents that support smart growth principles.

## Evaluation Metrics

| Performance Measure   | Agency Responsible for Collecting Data | Reporting Frequency |
|---|--|---------------------|
| Safety  |  |                     |
| TOL incidents and misuse  | SANDAG/MTS/CHP                         | Monthly             |
| Collision incidents along the corridor  | Caltrans/CHP                           | Monthly             |
| Incidents involving <i>Rapid</i> buses in the TOL (attributable / not attributable to <i>Rapid</i> )                    | SANDAG/MTS/CHP                         | Monthly             |
| Freeway Operations  |  |                     |
| MTS shoulder use conflicts (debris, cars, enforcement, etc.)  | SANDAG/MTS                             | Monthly             |
| Traffic data on freeway conditions during the evaluation period (during times of TOL operations and non-BOS operations) | SANDAG                                 | Monthly             |
| Transit Operations including Technology Metrics   |  |                     |
| GPS traces on <i>Rapid</i> buses in the I-805 & SR 94 corridors   | SANDAG                                 | Monthly             |
| <i>Rapid</i> Bus Travel Time Reliability (On Time Performance)  | MTS                                    | Monthly             |
| TPS requests and activations at ramp meters   | SANDAG                                 | Monthly             |
| Activations of Forward Collision, Blind Spot, and Lane Departure warnings   | SANDAG                                 | Monthly             |
| <i>Rapid</i> ridership  | SANDAG                                 | Monthly             |
| Observations  |  |                     |
| Number of times that MTS is contacted by Caltrans/CHP requesting the TOL be vacated                                     | MTS/CHP/Caltrans                       | Monthly             |
| Qualitative feedback from project participants  | Caltrans/SANDAG/MTS/CHP                | Quarterly           |

To determine the success of the Pilot, the performance measures described above will determine if the benefits of the project in terms of travel time reliability, safety, changes in freeway service and driver/passengers' perception is a benefit to the region.

## Project Stakeholder Responsibilities

| Agency   | Responsibilities   |
|----------|--|
| SANDAG   | <ul style="list-style-type: none"> <li>• Grant recipient and lead agency responsible for programming, funding, planning, awarding contracts for equipment and/or services and managing the delivery of all aspects of the project; Preparing and recommending approval of Decision Document</li> <li>• CA Traffic Control Devices Committee requestor</li> <li>• Equipping of vehicles with driver assistance and transit priority technology and operation of the service directly or via contract;</li> <li>• Stakeholder and PDT Owner – coordinate and attend meetings and actively participate in the project work efforts</li> <li>• Review and provide comments to the project deliverables in a timely manner</li> <li>• Oversee consultant effort</li> <li>• Oversee implementation of technology</li> <li>• Oversee procurement of buses</li> <li>• Oversee engineering procurement</li> <li>• Coordinate with partner agencies.</li> <li>• Marketing and outreach</li> <li>• Invoices and tracking</li> <li>• Provide performance measure reports to the Stakeholder group</li> <li>• Participate in project conflict resolution</li> </ul> |
| MTS      | <ul style="list-style-type: none"> <li>• Develop and implement the transit-operating plan, bus operator training modules including CHP participation,</li> <li>• Stakeholder and PDT Member;</li> <li>• Attend meetings and actively participate in the project work efforts;</li> <li>• Review and provide comments to the project deliverables in a timely manner.</li> <li>• Provide reports to SANDAG – weekly, monthly, quarterly on agreed upon performance measures;</li> <li>• Ongoing monitoring and reporting of driver performance while utilizing TOL</li> <li>• Participate in public outreach</li> <li>• Participate in project conflict resolution.</li> </ul>  |
| Caltrans | <ul style="list-style-type: none"> <li>• Lead agency for environmental clearance.</li> <li>• Approving Decision Document</li> </ul>  |

|                           |  |
|---------------------------|--|
|                           | <ul style="list-style-type: none"> <li>• Work with SANDAG on development and maintenance of the roadside infrastructure to operate the transit priority service,</li> <li>• Work with SANDAG on the integration of Intelligent Transportation Systems (ITS) measures for integration on the project.</li> <li>• Issue encroachment permit;</li> <li>• Stakeholder and PDT Member;</li> <li>• Attend meetings and actively participate in the project work efforts;</li> <li>• Provide IQA for project deliverables in a timely manner.</li> <li>• Participate in public outreach</li> <li>• Participate in project conflict resolution.</li> </ul> |
| California Highway Patrol | <ul style="list-style-type: none"> <li>• Review the decision document and project concepts; provide input relating to enforcement and incident clearance activities.</li> <li>• Stakeholder and PDT member.</li> <li>• Provide officer input during driver training classes with MTS drivers.</li> <li>• Additional enforcement (separate MOU for compensation)</li> <li>• Provide monthly data on all enforcement events and incidents</li> <li>• Participate in public outreach</li> <li>• Participate in project conflict resolution.</li> </ul>  |

## **Project Conflict Resolution**

In the event that there is a dispute, the parties (Caltrans, SANDAG, MTS, CHP) will first attempt to resolve agreement disputes at the project staff and project manager level. If they cannot resolve the dispute the following hierarchy of dispute resolute personnel will be utilized until the conflict is resolved. Dispute can be resolved with in person meetings, teleconferences, or via email.

**Step 1.** Corridor Director, CHP Commissioner or designee, MTS Chief Operating Officer, AND SANDAG Director of Land Use and Transportation

**Timeframe:** Five working days from incident for resolution. If resolution is not achieved, move on to Step 2.

**Step 2.** CALTRANS District Director (or designee), CHP Commissioner or designee, MTS Chief of Staff, and SANDAG Chief Deputy Executive Director (or designee);

**Timeframe:** 10 working days from incident for resolution. If resolution is not achieved, move on to Step 3.

**Step 3.** CALTRANS Director (or designee), and SANDAG Executive Director (or designee), CHP Commissioner (or designee), MTS Chief Executive Officer;

**Timeframe:** 10 working days from Step 3 for resolution. If resolution is not achieved,