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1.0 INTRODUCTION

The Northwest Valley Sun Cities Transit Implementation Plan was initiated in December 2018 to develop a comprehensive understanding of the transportation needs of the unincorporated communities of Sun City and Sun City West. The product of developer Del E. Webb, Sun City and Sun City West are Census Designated Places (CDP) and retirement communities designed for active adults 55 years and older. Located approximately 20 miles northwest of downtown Phoenix, the communities have a combined population of 64,085 as of 2017. This final report summarizes the findings from the existing conditions analysis, identifies potential transit service concepts and cost estimates, and describes existing transit funding sources and potential funding solutions for the Northwest Valley Sun Cities. Each of these components is explored in detail in the following sections.

The project study area is illustrated in Figure 1.

Photo credit: Sarah Schiffman
Figure 1. Study Area
2.0 EXISTING CONDITIONS

This section documents the existing conditions in the Northwest Valley Sun Cities and includes a review of previous studies, a description of demographic trends, identification of activity centers and land use, and an inventory of existing and planned transit services.

2.1 Review of Previous Studies

A review of previous studies was conducted to identify recommendations relevant to the Northwest Valley Sun Cities Transit Implementation Plan. A brief description of each study is provided below. A summary of relevant recommendations from each study is provided in Table 1.

**MAG / Northwest Valley Local Transit System Study (2013)**

The Maricopa Association of Governments’ (MAG) Northwest Valley Local Transit System Study (NWVTSS) evaluated existing and future transit conditions in the Northwest Valley sub-region of the Metropolitan Phoenix area and recommended transit service options for the short-, mid-, and long-term planning horizons. Recommendations with particular relevance to the Sun Cities area include: combining Route 571–Surprise Express and the Grand Avenue Limited; implementing several new circulator routes; extending local routes 138–Thunderbird Rd, 170–Bell Rd, and 90–Dunlap Ave/Cave Creek Rd; and implementing local bus service in the 83rd Ave corridor.

**Valley Metro / Peoria Transit Implementation Plan (2015)**

The Peoria Transit Implementation Plan took the transit concepts identified in MAG’s NWVTSS and further defined those relevant to the City of Peoria. The implementation plan identified two services as priorities: the extension of Route 83–83rd Ave and a new neighborhood circulator route. Both recommendations have been implemented in the years since the study was completed.

**Valley Metro / Grand Avenue Transit Feasibility Study (2017)**

The Grand Avenue Transit Feasibility Study evaluated and identified short-, mid-, and long-term transit options for the Grand Avenue corridor between Surprise and Downtown Phoenix. The primary recommendations include: consolidate and reconfigure Route 571–Surprise Express and Route 573–West Glendale Express (short-term); implement a new limited-stop all day service (mid-term); and commuter rail along the Burlington Northern Santa Fe (BNSF) rail line from Wittman to Downtown Phoenix (long-term).

**MAG / Regional Commuter Rail System Study Update (2018)**

MAG’s Regional Commuter Rail System Study Update further analyzed and revised the results of the original study completed in 2010. The study evaluated four individual commuter rail lines (Grand, Kyrene, Estrella and San Tan) and two combined corridors (Grand/Kyrene Line and Estrella/San Tan Line). Of particular relevance to the Sun Cities area, the Grand/Kyrene line, which would operate along Grand Avenue from Wickenburg to Downtown Phoenix before heading south to Wild Horse Pass and I-10, was projected to have the highest ridership with over 10,000 boardings per day. In contrast to the 2010 study, the update recommended implementing both lines (Grand/Kyrene and Estrella/San Tan) at the same time instead of in phases. The study also outlined several potential funding mechanisms and governance structures that could be utilized to successfully implement and manage the proposed commuter rail system.

**City of Surprise Transit Feasibility Study (2018)**

The Surprise Transit Feasibility Study was initiated in December 2017 to develop a comprehensive understanding of the City’s current and future transit needs. The study recommended a series of transit improvements over both the short-term (2019-2025) and long-term (2026-2035) planning horizons that would bring additional transit services either within or in close proximity to the Northwest Valley Sun Cities.
Cities study area. These include the extension of local Route 170–Bell Rd and Route 138–Thunderbird Rd, the implementation of two new circulator routes and one local route, and additional trips on Route 571–Surprise Express. As there are currently no local or regional funds available to implement the service recommendations, the study stressed the need for the city to identify a dedicated, sustainable funding source for transit services.

### Table 1. Summary of Recommendations from Previous Studies

<table>
<thead>
<tr>
<th>STUDY</th>
<th>RECOMMENDATION</th>
</tr>
</thead>
</table>
| **Northwest Valley Local Transit System Study (2013)** | **Short-Term Recommendations**  
Establish an intergovernmental cooperative agreement among Northwest Valley communities to handle administrative and funding responsibilities.  
Combine Route 571–Surprise Express and Grand Avenue Limited and add mid-day service.  
Create six local circulator routes including a Sun City/Yougntown route and a Sun City West route.  
**Mid-Term Recommendations**  
Extend Route 138–Thunderbird Rd to Surprise.  
Extend Route 170–Bell Rd to Surprise.  
**Long-Term Recommendations**  
Implement local bus service in 83rd Ave corridor.  
Extend Route 90–Dunlap/Cave Creek Rd along Olive Ave and north to 111th Ave and Peoria Ave. |
| **Peoria Transit Implementation Plan (2015)**       | Extend Route 85–83rd Ave from Camelback to Arrowhead Towne Center (implemented in October 2017).  
Implement new circulator route in the areas bounded by Bell Rd, 75th Ave, Happy Valley Rd, and 99th Ave (Peoria-on-the-Go (POGO) route began operation in April 2019 and is currently being reconfigured). |
| **Grand Avenue Transit Feasibility Study (2017)**   | **Short-Term (2020)** - consolidate and reconfigure Route 571–Surprise Express and Route 573–West Glendale Express.  
**Mid-Term (2026)** - implement new limited-stop all day service from Surprise to Downtown Phoenix  
**Long-Term (2035)** - commuter rail along the BNSF rail line from Wittman to Downtown Phoenix |
| **Regional Commuter Rail System Study Update (2018)** | Implement both the Grand/Kyrene (53.7 miles) and Estrella/San Tan (61.4 miles) commuter rail lines. Routes would operate at 30-minute frequencies during peak periods and 120-minutes during midday hours.  
Establish rail access agreement with UPRR and BNSF railway.  
Determine appropriate governance structure for managing, designing, constructing and operating the proposed system.  
Secure funding for commuter rail system which would likely include a combination of federal, state, regional, local and private funding sources. |
| **Surprise Transit Feasibility Study (2018)**        | **Short-Term Recommendations**  
Extend Route 170–Bell Rd from Arrowhead Towne Center to Citrus Rd.  
Extend Route 138–Thunderbird Rd from Banner Boswell Medical Center to Cotton Lane.  
Implement new Greenway Rd circulator that would operate from Bell Rd and R H Johnson Blvd to Willow Canyon High School.  
**Long-Term Recommendations**  
Implement new Bullard Ave circulator that would operate from the Banner Del E. Webb Medical Center to Cactus Rd and Reems Rd.  
Add two additional inbound and outbound trips to Route 571–Surprise Express.  
Implement new local route on Litchfield Rd from the Banner Del E. Webb Medical Center to Lower Buckeye Rd. |

Source: Valley Metro, 2019
2.2 Demographics

This section documents study area demographics using available data from the Census Bureau’s American Community Survey (ACS) and MAG. As summarized in Table 2, the demographic makeup of the study area is substantially different than that of the County. In particular, the study area concentration of minority and poverty populations is a fraction of that of the County. However, its share of senior and disabled populations is far greater than that of the County, indicating a community with specialized transportation needs.

Table 2. Select Demographic Characteristics

<table>
<thead>
<tr>
<th></th>
<th>TOTAL POPULATION</th>
<th>MINORITY POPULATION</th>
<th>POPULATION BELOW POVERTY</th>
<th>DISABLED POPULATION</th>
<th>POPULATION 65 YEARS AND OVER</th>
<th>ZERO AUTO HOUSEHOLDS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sun City</td>
<td>39,000</td>
<td>7.3%</td>
<td>9.1%</td>
<td>32.8%</td>
<td>75.6%</td>
<td>6.2%</td>
</tr>
<tr>
<td>Sun City West</td>
<td>25,085</td>
<td>2.9%</td>
<td>6.8%</td>
<td>28.4%</td>
<td>82.8%</td>
<td>5.7%</td>
</tr>
<tr>
<td>Sub-Total</td>
<td>64,085</td>
<td>5.9%</td>
<td>8.2%</td>
<td>31.1%</td>
<td>78.4%</td>
<td>6.0%</td>
</tr>
<tr>
<td>Maricopa County</td>
<td>4,155,501</td>
<td>43.7%</td>
<td>15.7%</td>
<td>11.0%</td>
<td>14.1%</td>
<td>6.3%</td>
</tr>
</tbody>
</table>

Source: 2013-2017 American Community Survey 5-year estimates
Note: Percentages for poverty and disabled populations are based on different total populations (non-institutionized population and population for whom poverty status is determined, respectively).

A review of housing characteristics also highlights some substantial differences between the study area and the County. As summarized in Table 3, the study area has a higher vacancy rate than that of the County (20 percent versus 12.4 percent). However, a much larger share of vacant housing units in the study area are used for seasonal, recreational, or occasional purposes than in the County (66 percent vs 39.1 percent). This is indicative of the large snowbird population that lives in the study area on a seasonal basis.

Table 3. Select Housing Characteristics

<table>
<thead>
<tr>
<th></th>
<th>TOTAL HOUSING UNITS</th>
<th>OCCUPIED HOUSING UNITS</th>
<th>VACANT HOUSING UNITS</th>
<th>VACANT FOR SEASONAL, RECREATIONAL, OR OCCASIONAL USE</th>
<th>VACANT OTHER</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sun City</td>
<td>29,217</td>
<td>79.7%</td>
<td>20.3%</td>
<td>63.5%</td>
<td>36.5%</td>
</tr>
<tr>
<td>Sun City West</td>
<td>18,762</td>
<td>80.5%</td>
<td>19.5%</td>
<td>70.0%</td>
<td>30.0%</td>
</tr>
<tr>
<td>Sub-Total</td>
<td>47,979</td>
<td>80.0%</td>
<td>20.0%</td>
<td>66.0%</td>
<td>34.0%</td>
</tr>
<tr>
<td>Maricopa County</td>
<td>1,699,628</td>
<td>87.6%</td>
<td>12.4%</td>
<td>39.1%</td>
<td>60.9%</td>
</tr>
</tbody>
</table>

Source: 2013-2017 American Community Survey 5-year estimates

1The term “snowbird” refers to seasonal travelers, usually retirees, who spend the winter months in areas with warmer climates.
Existing demographics in the study area have been mapped to illustrate the geographic distribution of various demographic categories. The categories are illustrated using density, which is a better indicator for transit analysis. Figures 2 through 11 show current demographic conditions in the study area for the following categories:

- Existing population density
- Future population density (2040)
- Existing employment density
- Future employment density (2040)
- Population below poverty density
- Minority population density
- Zero-auto household density
- Persons with disabilities density
- Population Over 64 Density
- Cumulative transit propensity

The cumulative transit propensity map, which combines all the demographic categories, indicates the areas of highest transit need in Sun City are primarily adjacent to Grand Avenue, though pockets of higher need are also present along the Bell Road and Peoria Avenue corridors. Similarly, the areas of highest transit need in Sun City West are adjacent to Grand Avenue.
Figure 2. Existing Population Density

Source: 2013-2017 American Community Survey 5-year Estimates
Figure 3. Future Population Density (2040)

Source: MAG, 2019
Figure 4. Existing Employment Density

LEGEND

- Study Area

Employees per Square Mile

- < 445
- 445 - 1,150
- 1,151 - 2,550
- 2,551 - 4,150
- > 4,150

Source: MAG, 2017
Figure 5. Future Employment Density (2040)

Legend:
- Study Area
- Employees per Square Mile (2040):
  - < 445
  - 445 - 1,150
  - 1,151 - 2,550
  - 2,551 - 4,150
  - > 4,150

Source: MAG, 2019
Figure 6. Population below Poverty Density

Source: 2013-2017 American Community Survey 5-year Estimates
Figure 7. Minority Population Density

Source: 2013-2017 American Community Survey 5-year Estimates
Figure 8. Zero-Auto Household Density

Source: 2013-2017 American Community Survey 5-year Estimates
Figure 9. Disabled Population Density

Source: 2013-2017 American Community Survey 5-year Estimates
Figure 10. Population over 64 Density

Source: 2013-2017 American Community Survey 5-year Estimates
Figure 11. Cumulative Transit Propensity

2.3 Existing Activity Centers and Land Use

Activity centers are sites that act as common origins and destinations for transit trips. These include regional shopping centers, educational facilities, medical facilities, civic facilities, etc. Existing activity centers in the study area are illustrated in Figure 12 (note: activity centers in the immediate vicinity of the study area are also included).

Existing and future land use in the study area is illustrated in Figures 13 and 14. Both land use scenarios are identified by MAG, with existing representing 2017 land use and future representing build-out land use conditions and having no particular date assigned.

Much of the existing land use in the study area is single-family and multi-family residential (55.4 percent and 13.5 percent respectively) with commercial, public, and industrial uses distributed along the arterial roadway network. These land use patterns remain consistent in the future scenario.
Figure 12. Activity Centers

LEGEND

Study Area

Activity Centers
- Community Facilities
  1. Fairway Library
  2. Sun City West Library
  3. Sun City Library
  4. Sun Cities Area Historical Society
  5. Sun City West Visitor Center
  6. RH Johnson Recreation Center
  7. Kuentz Recreation Center
  8. Palm Ridge Recreation Center
  9. Beardsley Recreation Center
  10. Youngtown Library
  11. Sun Bowl Amphitheater
  12. Mountain View Recreation Center
  13. Fairway Recreation Center
  14. Banner Olive Branch Senior Center
  15. Lakeview Recreation Center
  16. Sundial Recreation Center
  17. Bell Recreation Center
  18. Marinette Recreation Center

- Hospital/Medical Center
  19. Banner Del E Webb Medical Center
  20. Banner Boswell Hospital
  21. Northwest Veterans Affairs Health Care Clinic
  22. Plaza Del Rio Medical/Business Park
  23. Trillium Specialty Hospital
  24. Laronde Center
  25. NextCare Urgent Care

- Public Facilities
  26. USPS - Sun City
  27. USPS - Sun City West

- Shopping Centers
  28. Grand Village Center
  29. Surprise Pavillions
  30. Surprise Marketplace
  31. Surprise Towne Center
  32. Albertsons Shopping Center
  33. Crossroads Towne Center
  34. Fry’s Shopping Center
  35. Basha’s Shopping Center
  36. Grand Avenue Shopping Center
  37. Fry’s Shopping Center
  38. Sun Bowl Plaza
  39. Safeway Shopping Center
  40. Arrowhead Shopping Center
  41. Youngtown Shopping Center
  42. Thunderbird Plaza Shopping Center
  43. Laronde Shopping Center
  44. Greenway Terrace
  45. Sun City Promenade
  46. Sun Shadow Square Plaza
  47. Bell Camino Center
  48. Bellmar Plaza
  49. Basha’s Shopping Center

Source: Metro, 2019
Figure 13. Existing Land Use

[Map showing existing land use with various categories such as Active Open Space, Business Park, Cemetery, Commercial High, Commercial Low, Developing Employment, Developing Residential, Educational/Religious, Golf Course, Industrial, Medical/Nursing Home, Mixed Use, Multi Family-Apartment/condo, Office, Other Employment, Passive/Restricted Open Space, Public/Special Event/Military, Religious/Institutional, Single family low density, Single family medium density, Single family high density, Tourist Accommodations, Transportation, Vacant, and Water.

Source: MAG, 2017]
Figure 14. Future Land Use

Source: MAG, 2017
2.4 Existing Transit Service

This section documents existing transit services in the study area and summarizes their operating characteristics and key performance statistics. The existing transit network is illustrated in Figure 15.

2.4.1 Inventory of Transit Services

Local Bus

The study area is currently served by two local routes: Route 106–Peoria Ave and Route 138–Thunderbird Rd. Route 106 operates from the Sunnyslope Transit Center at 3rd Street and Dunlap Avenue in Phoenix to 105th Drive and Santa Fe Drive in Sun City. The route operates at 60-minute frequencies on weekdays with no weekend service. Outside the study area (east of 99th Avenue and Peoria Avenue), the route operates at 30-minute frequencies on both weekdays and weekends.

Route 138 operates from Thunderbird Road and 32nd Street in Phoenix to 105th Drive and Santa Fe Drive in Sun City. The route operates at 30-minute frequencies on weekdays both within the study area and neighboring communities. Frequencies are reduced to 60 minutes in the study area on the weekends, while the rest of the route remains at 30 minutes.

Local bus fares are $2 for a one-ride pass and $4 for a day pass. Passes are also available in 7-day ($20), 15-day ($33), and 31-day ($64) packages. Reduced fares are offered to seniors age 65 and over, and to people with disabilities: $1 for a one-ride pass, $2 for a day pass, 7-day ($10), 15-day ($16.50), 31-day ($32). Additionally, passengers who are ADA-certified are eligible for the ADA Platinum Pass, which allows them to ride fare free on all local, express, and light rail services.

Express Bus

There is currently one express route that operates within the study area, the Route 571–Surprise Express. Route 571 operates from the Surprise Park-and-Ride at Bell Road and 134th Avenue to downtown Phoenix via Grand Avenue in the inbound direction and 1-10/Loop 101 in the outbound direction. The Surprise Express is a weekday-only service and provides four inbound trips to downtown Phoenix in the morning and four outbound trips to Surprise in the afternoon. While the route operates through Sun City, there are no stop locations within the study area. Passengers can board at one of two locations – the Surprise Park-and-Ride or the shared-use park-and-ride at the Walmart Supercenter at Thunderbird Road and 129th Avenue.

Express bus fares are $3.25 for a one-ride pass and $6.50 for a day pass. 31-day passes are available for $104.
Figure 15. Existing Transit Network

Source: Valley Metro, 2020
Neighborhood Circulator

While there are no circulators currently operating within the study area, the restructured Peoria-on-the-Go (POGO) network is scheduled for implementation in 2021 and serves the area just east of the study area in neighboring Peoria. The POGO service consists of three fare-free routes that provide connections to major destinations such as the Arrowhead Towne Center and the Peoria Sports Complex. The routes will operate Friday through Sunday at frequencies ranging from 75 minutes to 120 minutes.

ADA Paratransit

Paratransit service is a shared-ride, door-to-door service mandated by the Americans with Disabilities Act of 1990 (ADA) provided to people with disabilities who are not able to use traditional fixed-route transit service. The Federal Transit Administration (FTA) requires that, at a minimum, ADA complementary paratransit be provided within 3/4 of a mile of a bus route or rail station, at the same hours and days, for no more than twice the regular fixed route fare. Additional information on Valley Metro paratransit services is available on the program website.

Ridechoice Service

Valley Metro’s RideChoice program provides discounted on-demand service 24 hours per day, 365 days per year to persons with disabilities using taxi services and ride hailing services. To be eligible for the program, passengers in the Northwest Valley Sun Cities area must be certified as ADA-paratransit eligible, and provide proof of residency within a participating community. Wheelchair accessible service is available at no additional charge.

In October 2018, Valley Metro launched an enhanced RideChoice service for qualified participants. The redesigned program provides more service and more transportation options, including additional wheelchair-accessible vehicle providers and the ride-hailing service Lyft. Under the new fare structure, users pay $3 per one-way trip up to 8 miles in length and $2 for each mile after that. The monthly trip limit also increased from 16 to 20 one-way trips for any purpose, and from 40 to 50 one-way trips for work, school, or medical purposes. Effective as of August 2019, Uber has joined the program as a provider, and Lyft has ceased to participate. Additional information on the RideChoice program is available on the program website.

Vanpool

Valley Metro’s vanpool program is another service available to Sun City and Sun City West residents. Under the vanpool program, Valley Metro provides a group of six to 15 people with a van to use for commuting purposes. One qualified participant volunteers to be the driver, and each rider pays a monthly fare that covers the lease, fuel, maintenance, and insurance costs of the van. Additional information on Valley Metro’s vanpool program is available on the program website.

Other Transportation Services

In addition to the services described above, there are some specialized transportation services that operate within the study area. These options are summarized in Table 4. A complete list of transportation providers in the MAG region is available on their Connect-a-Ride website. Additional resources are available on the Northwest Valley Connect Transportation Services page.
Table 4. Additional Transportation Services

<table>
<thead>
<tr>
<th>AGENCY AND ADDRESS</th>
<th>SERVICE</th>
<th>HOURS OF OPERATION</th>
<th>FARE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benevilla</td>
<td>Volunteer service for transporting seniors to medical appointments</td>
<td>8 a.m. - 4:30 p.m. Monday - Friday</td>
<td>N/A</td>
</tr>
<tr>
<td>16752 N. Greasewood St</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Surprise, AZ 85374</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Northwest Valley Connect</td>
<td>Volunteer service providing local transportation to seniors and disabled</td>
<td>8 a.m. - 5 p.m. Monday - Friday</td>
<td>Variable</td>
</tr>
<tr>
<td>PO Box 9303</td>
<td>individuals for medical and general purpose trips</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Surprise, AZ 85374</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sun City Community Assistance Network (SCAAN)</td>
<td>Non-profit volunteer service</td>
<td>7 a.m. – 5 p.m. Monday - Friday</td>
<td>Not available</td>
</tr>
<tr>
<td>10195 W. Coggins Dr</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sun City, AZ 85351</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sun City Express</td>
<td>Van/car service to Sky Harbor International Airport</td>
<td>24-hour service Sunday - Saturday</td>
<td>Variable</td>
</tr>
<tr>
<td>11541 W. Bell Rd #105</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Surprise, AZ 85378</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: MAG; Northwest Valley Connect, 2019

2.4.2 Operating Characteristics

Service hours and frequencies for existing transit services operating within the study area or in close proximity are summarized in Table 5.

Table 5. Transit Service Hours and Frequencies

<table>
<thead>
<tr>
<th>ROUTE</th>
<th>WEEKDAY</th>
<th>SATURDAY</th>
<th>SUNDAY</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>SERVICE SPAN</td>
<td>FREQUENCY</td>
<td>SERVICE SPAN</td>
</tr>
<tr>
<td>LOCAL ROUTES</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Route 106–Peoria Ave • Study area • Outside</td>
<td>4:30 a.m. - 9:30 p.m. 4:00 a.m. - 12:45 a.m.</td>
<td>60</td>
<td>No service 5:00 a.m. - 2:45 a.m.</td>
</tr>
<tr>
<td>Peoria Ave</td>
<td>4:00 a.m. - 12:45 a.m.</td>
<td>30</td>
<td>30</td>
</tr>
<tr>
<td>Route 138–Thunderbird Rd • Study area •</td>
<td>5:00 a.m. - 10:15 p.m. 4:00 a.m. - 1:00 a.m.</td>
<td>30</td>
<td>5:45 a.m. - 9:30 p.m. 5:00 a.m. - 3:00 a.m.</td>
</tr>
<tr>
<td>Outside study area</td>
<td>4:00 a.m. - 1:00 a.m.</td>
<td>30</td>
<td>30</td>
</tr>
<tr>
<td>EXPRESS ROUTES</td>
<td>4 a.m. peak-period trips 4 p.m. peak-period trips</td>
<td>No service</td>
<td>No service</td>
</tr>
</tbody>
</table>

Source: Valley Metro, 2019
2.4.3 Transit Performance

Ridership data for existing transit service is provided in Valley Metro’s monthly and annual ridership reports. Average weekday boardings, total monthly boardings, daily revenue miles, and boardings per revenue mile for each route are summarized in Table 6.

Table 6. Existing Transit Performance

<table>
<thead>
<tr>
<th>ROUTE</th>
<th>Average Daily Boardings</th>
<th>Monthly Boardings</th>
<th>Daily Revenue Miles</th>
<th>Boardings per Revenue Mile</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Study Area</td>
<td>Route Total</td>
<td>Study Area</td>
<td>Route Total</td>
</tr>
<tr>
<td>LOCAL ROUTES</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Route 106–Peoria Ave</td>
<td>107</td>
<td>2,153</td>
<td>2,352</td>
<td>47,368</td>
</tr>
<tr>
<td>Route 138–Thunderbird Rd</td>
<td>-</td>
<td>1,680</td>
<td>-</td>
<td>36,973</td>
</tr>
<tr>
<td>EXPRESS ROUTES</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Route 571–Surprise Express</td>
<td>-</td>
<td>132</td>
<td>-</td>
<td>2,959</td>
</tr>
</tbody>
</table>

Source: Valley Metro Ridership Report, April 2019

1This measure is reported as boardings per trip for express bus services.

2The Valley Metro ridership reports do not provide Sun City ridership for Route 138.

In addition to the fixed-route services described above, an analysis of the ADA paratransit trips in the study area was also conducted. There were over 10,000 ADA paratransit trips that originated in the study area in FY 2019, with an average trip length of 6.6 miles. As illustrated in Figure 16, the most common destination city/jurisdiction for trips that originated in the study area was Sun City (44.9 percent), followed by Sun City West (15.9 percent) and Phoenix (14.4 percent).

The ADA paratransit trip origins and destinations were also mapped to illustrate the locations in which they were primarily concentrated. As illustrated in Figure 17, the locations in the study area with a high concentration of trip origins include the Banner Del Webb and Banner Boswell Medical Centers, the intersection and surrounding areas of Del Webb Boulevard and Thunderbird Boulevard, and the area around Bell Road and 99th Avenue. As illustrated in Figure 18, the destinations for these trips are primarily concentrated within Sun City and Sun City West, with select locations in Surprise, Peoria, and Phoenix appearing as common destinations, though in lower concentrations.
Figure 16. Destination Cities for ADA Paratransit Trips in Study Area (FY 2019)

- Sun City: 44.9%
- Sun City West: 15.9%
- Phoenix: 14.4%
- Peoria: 7.2%
- Glendale: 6%
- Surprise: 5.6%
- Wittman: 2.1%
- Waddell: 1.0%
- Other: 2.7%

Source: Valley Metro, 2019
Figure 17. ADA Paratransit Trip Pick Up Locations in Study Area

Source: Valley Metro, 2019
2.5 Planned Transit Services

Valley Metro’s Short Range Transit Program (SRTP) identifies service change concepts for regional and local fixed-route services over a five-year planning horizon. The SRTP is updated annually and is divided into two planning phases: Production Years (years 1-3) and Development Years (years 4-5). Service change concepts programmed in the Production Years have committed funding and an implementation schedule. Service change concepts in the Development Years have no funding committed and may require further analysis and discussion.

The FY 2019 SRTP\(^2\) includes three services in the Development Years that would operate within the study area or close proximity. These services include the extension of Route 170–Bell Rd and Route 138–Thunderbird Rd to the Surprise Civic Center (FY 2022 and 2023 respectively) and the implementation of a new circulator in Surprise (FY 2023). The planned transit services are illustrated in Figure 19.

\(^2\)Due to the COVID-19 pandemic, the SRTP was not updated in 2020. The next update is planned for Spring 2021.
Figure 19. Planned Transit Services

Source: Valley Metro, 2020
2.6 Transit Survey

As part of the study, a survey was created to understand the current transportation habits and needs of Sun City and Sun City West residents. The survey was available digitally via Survey Monkey from March through May 2019, and hard copies were distributed at community events. In total, 1,544 valid self-selected surveys were collected as a result of these efforts. Some key findings of the survey include:

- 76 percent of respondents were full-time Sun City/Sun City West residents, and 24 percent were part-time residents.
- The largest share of respondents (54 percent) had one vehicle available at their household, with an additional 35 percent reporting 2 vehicles. Only 3 percent of respondents indicated they had no vehicles available at their household.
- The trip purposes that the largest share of respondents indicated they travel to “very often” (7+ times per week) or “often” (5-7 times per week) were shopping (33 percent) and recreation/social (31 percent).
- The predominant transportation method among survey respondents was driving an automobile, with 82 percent indicating they drive “very often” or “often.” Driving a golf cart was the next closest response, with 21 percent of respondents indicating they did so “very often” or “often.”
- A majority of survey respondents (63 percent) indicated they had used transit before.
- The most common concern survey respondents had with using transit was that service was not close enough to their origin/destination (53 percent), followed by those that had no current concerns (42 percent) and those who were unsure of the current transit routes and schedules (38 percent).
- The location that the largest share of survey respondents indicated they would be interested in accessing via transit was Downtown Phoenix for special events (57 percent). The next most common responses were local destinations (e.g. dining, retail, medical, recreations centers, etc.) within 5 miles (50 percent) and local destinations farther than 5 miles (50 percent).

The full survey results are summarized in Figures 20–26.
Figure 20. Survey Results: Question 1

Are you a current Sun City or Sun City West resident?

- Yes, Full Time: 75.6%
- Yes, Part Time: 24.4%

Figure 21. Survey Results: Question 2

How many working vehicles are available at your household?

- 0: 35%
- 1: 54%
- 2: 6%
- 3: 1%
- 4+: 3%
- No Responses: 2%
Figure 22. Survey Results: Question 3

How many times per week do you travel to the following locations?

- Workplace / Volunteer Place:
  - Very Often (7+ times): 7%
  - Often (5-7 times): 14%
  - Rarely (1-2 times): 14%
  - Sometimes (3-4 times): 19%
  - Very Rarely (<1 time): 31%
  - No Response: 3%

- Other Work-Related:
  - Very Often (7+ times): 3%
  - Often (5-7 times): 9%
  - Rarely (1-2 times): 8%
  - Sometimes (3-4 times): 28%
  - No Response: 3%

- Medical:
  - Very Often (7+ times): 2%
  - Often (5-7 times): 4%
  - Rarely (1-2 times): 5%
  - Sometimes (3-4 times): 21%
  - No Response: 5%

- Personal Business:
  - Very Often (7+ times): 6%
  - Often (5-7 times): 10%
  - Rarely (1-2 times): 4%
  - Sometimes (3-4 times): 26%
  - No Response: 28%

- Shopping:
  - Very Often (7+ times): 2%
  - Often (5-7 times): 4%
  - Rarely (1-2 times): 5%
  - Sometimes (3-4 times): 19%
  - No Response: 10%

- Dining Out:
  - Very Often (7+ times): 3%
  - Often (5-7 times): 15%
  - Rarely (1-2 times): 3%
  - Sometimes (3-4 times): 14%
  - No Response: 10%

- Recreation/Social:
  - Very Often (7+ times): 3%
  - Often (5-7 times): 13%
  - Rarely (1-2 times): 10%
  - Sometimes (3-4 times): 22%
  - No Response: 3%
Figure 23. Survey Results: Question 4

How many times per week do you use the following transportation methods in Arizona?

<table>
<thead>
<tr>
<th>Method</th>
<th>Very Often (7+ times)</th>
<th>Often (5-7 times)</th>
<th>Sometimes (3-4 times)</th>
<th>Rarely (1-2 times)</th>
<th>Very Rarely (&lt;1 time)</th>
<th>No Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Drive a vehicle like a car, truck, or motorcycle</td>
<td>63%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Drive a golf cart</td>
<td>45%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ride with family or friends</td>
<td>38%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ride with a free volunteer driver service</td>
<td>77%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Walk</td>
<td>33%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Use personal mobility device</td>
<td>76%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ride a bicycle</td>
<td>60%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Use taxi or cab service</td>
<td>75%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Use a service like Uber or Lyft</td>
<td>72%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ride public transportation</td>
<td>76%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Use paratransit services</td>
<td>77%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Percentage</th>
<th>10%</th>
<th>20%</th>
<th>30%</th>
<th>40%</th>
<th>50%</th>
<th>60%</th>
<th>70%</th>
<th>80%</th>
<th>90%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very Often (7+ times)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>19%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Often (5-7 times)</td>
<td>19%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sometimes (3-4 times)</td>
<td>11%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rarely (1-2 times)</td>
<td></td>
<td>15%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Very Rarely (&lt;1 time)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No Response</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Figure 24. Survey Results: Question 5

Have you ever used public transportation?

- Yes: 63%
- No: 35%
- No Response: 2%
Figure 25. Survey Results: Question 6

Indicate any general concerns with using the bus as a form of transportation

<table>
<thead>
<tr>
<th>Concern</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unsure of how to ride the Bus</td>
<td>10%</td>
</tr>
<tr>
<td>Unsure of current bus service schedule and routes</td>
<td>38%</td>
</tr>
<tr>
<td>Disability prevents me from using the bus</td>
<td>4%</td>
</tr>
<tr>
<td>Ride with a free volunteer driver service</td>
<td>3%</td>
</tr>
<tr>
<td>Service Hours don’t work with my schedule</td>
<td>15%</td>
</tr>
<tr>
<td>Service is not close enough to my starting/ ending point</td>
<td>53%</td>
</tr>
<tr>
<td>Safety concerns while riding or waiting for the bus</td>
<td>12%</td>
</tr>
<tr>
<td>Service is too expensive</td>
<td>2%</td>
</tr>
<tr>
<td>No current concerns</td>
<td>42%</td>
</tr>
</tbody>
</table>

Figure 26. Survey Results: Question 7

If additional transit services could be added to your area, where would you be interested in taking it to?

<table>
<thead>
<tr>
<th>Destination</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local destinations &lt; 5 miles</td>
<td>50%</td>
</tr>
<tr>
<td>Local destinations &gt; 5 miles</td>
<td>50%</td>
</tr>
<tr>
<td>A different city center</td>
<td>47%</td>
</tr>
<tr>
<td>Nearby transit centers</td>
<td>43%</td>
</tr>
<tr>
<td>Downtown Phoenix (retail/ medical/ personal errand)</td>
<td>33%</td>
</tr>
<tr>
<td>Downtown Phoenix special events</td>
<td>57%</td>
</tr>
</tbody>
</table>
3.0 TRANSIT SERVICE OPTIONS

This section documents the transit service options that have been developed for consideration. The options cover a variety of modes and service types and offer both local and regional connectivity. Each option is described in the following sections.

3.1 Microtransit

Microtransit is an emerging transit mode that offers flexible and dynamic demand-driven transportation solutions to areas with limited transit access or where traditional fixed-route service is simply not feasible. Microtransit services typically operate with a fleet of smaller vehicles (e.g., cutaway vans or buses) in defined zones, with dynamic routing based on real-time demand. Similar to Transportation Network Companies (TNCs) like Uber and Lyft, users in designated areas simply specify the details of their trips on a mobile application, and a vehicle is summoned to deliver them to their destination. Operating specifics such as service hours and coverage area can be tailored to meet the needs and/or resources of the agency (e.g., fleet availability, operating budget, etc.).

Microtransit services can address a variety of challenges, from serving low-density areas more efficiently, to upgrading or supplementing existing dial-a-ride or paratransit services, to addressing the first mile/last mile issue of fixed-route services. Microtransit services are commonly implemented by transit agencies in partnership with third-party providers that handle technology, routing, dispatch, and customer service. Service delivery models can also be customized to fit an agency’s specific need. For example, some agencies may choose to purchase the technology only and provide their own vehicles and operators. Others looking for a more turnkey solution can choose a package that includes both the technology and the drivers, vehicles, and operations management.

Valley Metro, in coordination with the City of Glendale, launched the first microtransit pilot program in the region in 2020. The pilot program is a new way to help modernize traditional dial-a-ride that has been operating in the same manner for many years. The pilot program offers an on-demand, curb-to-curb shuttle service offered by the City of Glendale for those residents in the city whose origin and trip destination is north of Thunderbird Road and within the city limits. The service is currently free and offered Monday through Friday from 7:00 a.m. to 5:30 p.m. The pilot began in early March, just before the COVID-19 pandemic impact on Arizona took full-effect. During Governor Ducey’s Stay at Home Executive Order, the pilot program was providing service to roughly 10 riders per day, but that number has increased to roughly 46 riders per day as of October 2020. Average wait times for service is 15 minutes or less. The pilot program is scheduled to run through December 31, 2020.

An additional pilot program is being considered in the City of Mesa. The experiences from these initial programs can inform how a similar program could be implemented in the Northwest Valley Sun Cities area.

3.2 Neighborhood Circulator

Neighborhood circulator services are short, circuitous routes that connect to local activity centers and the greater regional transit network. Whereas local bus routes primarily operate along arterial roadways, neighborhood circulators focus more on local and residential streets. Neighborhood circulator routes are typically served by smaller cutaway vehicles and can charge a fare or operate fare-free. (In this region, most circulators are fare-free). Passenger stops can either be fixed, on a “flag” basis, or a combination of both.
Three neighborhood circulator alternatives that serve a variety of local and regional destinations were developed for consideration. These options are illustrated in Figure 27 and briefly described below.

- **Option 1A/1B** operates from the Banner Del Webb Medical Center in Sun City West to the Arrowhead Transit Center in Glendale primarily along the Meeker Boulevard, R H Johnson Boulevard, Dysart Road, Grand Avenue, Thunderbird Road, 99th Avenue and Bell Road corridors (note: the only difference between options 1A and 1B is the corridor used between Dysart Road and Grand Avenue and Thunderbird Road and Grand Avenue; Option 1A uses Dysart Road and Waddell Road while 1B uses Grand Avenue). This option would provide connections to the regional transit network at Banner Boswell Medical Center (routes 106 and 138) and the Arrowhead Transit Center (routes 67, 83, 170, and 186).

- **Option 2** operates from the Banner Del Webb Medical Center in Sun City West to the Banner Boswell Medical Center in Sun City primarily along the Meeker Boulevard, R H Johnson Boulevard, Bell Road, 99th Avenue, and Thunderbird Road corridors. This option would provide connections to the regional transit network at Banner Boswell Medical Center (routes 106 and 138).

- **Option 3** operates from the Banner Del Webb Medical Center in Sun City West to the Arrowhead Transit Center in Glendale primarily along the Meeker Boulevard, R H Johnson Boulevard, and Bell Road corridors. This option would provide connections to the regional transit network at the Arrowhead Transit Center (routes 67, 83, 170, and 186).
Figure 27. Circulator Options

Source: Valley Metro, 2019
3.3 Local Bus

Local bus is traditional fixed-route bus service that operates on arterial roadways and features stops every quarter mile to maximize passenger access. Two local bus scenarios were developed for consideration. These include improvements to existing services to comply with Valley Metro’s established Transit Standards and Performance Measures and the extension of two routes into the study area. These scenarios are described in the following sections.

3.3.1 Improvements to Existing Local Service

In 2016, the Valley Metro Boards adopted regional Transit Standards and Performance Measures, which established minimum recommended operating characteristics for all transit modes operating in the region. It should be noted that these standards are simply recommendations intended to deliver uniform service to passengers and there are still routes in the system that operate below the standards. However, member cities are encouraged to meet the minimum standards as they plan and implement transit improvements in their community. The two local routes operating in the study area, Route 106–Peoria Ave and Route 138–Thunderbird Rd, do not currently meet the recommended service standards for either days of operation, span of service, frequency, or a combination of all three. As such, this option would improve these routes as follows:

- **Route 106–Peoria Ave**: increase weekday frequency in the study area from 60 minutes to 30 minutes; add Saturday service for a span of 14 hours with 30-minute frequencies; and add Sunday service for a span of 12 hours with 30-minute frequencies.
- **Route 138–Thunderbird Rd**: increase Saturday and Sunday frequency in the study area from 60 minutes to 30 minutes.

The improvements to existing local bus services are illustrated in Figure 28.

3.3.2 Local Route Extensions

This option would implement the extensions of Route 138 and Route 170 identified in Valley Metro’s FY 2019 Short Range Transit Program [note: no funding has been committed for these extensions]. These extensions are briefly described below.

- **Route 138–Thunderbird Rd**: extend service 7 miles west from current terminus at Banner Boswell Medical Center to Surprise Civic Center.
- **Route 170–Bell Rd**: extend service 10 miles west from current terminus at Arrowhead Transit Center to Surprise Civic Center.

The local route extensions are illustrated in Figure 29.
Figure 28. Improvements to Existing Local Service

- Increase weekend frequency
- Increase weekday frequency
- Add weekend service

Source: Valley Metro, 2019
Figure 29. Local Route Extensions

Source: Valley Metro, 2019
3.4 Express Bus

Express bus routes serve commuter markets by providing peak-period, peak-direction service between suburban areas and downtown Phoenix, primarily along freeway corridors. The Route 571–Surprise Express currently operates in the study area along Grand Avenue, providing service from the Surprise Park-and-Ride at Bell Road and Grand Avenue to downtown Phoenix (note: this service does not currently stop in the study area. However, passengers can board the service at stops in the neighboring communities of El Mirage and Surprise). This option would add two inbound/outbound trips to Route 571 during weekday off-peak periods (e.g., midday or evening), to potentially meet the desire for special event service to downtown Phoenix that was identified in the transit survey (See additional discussion of special event service in Section 3.6 Other Service Options).

The express bus option is illustrated in Figure 30.
Figure 30. Express Bus Option

- Add Two Additional Round Trips

Source: Valley Metro, 2019
3.5 Limited Stop Bus

Limited stop bus service is a high frequency, all-day service, with limited or infrequent passenger stops to facilitate higher operating speeds. In Valley Metro’s Grand Avenue Transit Feasibility Study (2017), all-day limited stop bus service was identified as the mid-term (defined as 2026) recommendation for the Grand Avenue corridor. This option would implement limited stop bus service from the Surprise Civic Center to Downtown Phoenix via Grand Avenue.

The limited stop bus option is illustrated in Figure 31.
Figure 31. Limited Stop Bus Option

Legend:
- Study Area
- Park-and-Ride
- Grand Avenue Limited Stop
- Future POGO Service (2021)
- Valley Metro Bus Routes

Source: Valley Metro, 2019
3.6 Other Service Options

A key finding of the transit survey was the desire for special event service to downtown Phoenix. Traditional fixed-route transit service is dependent on consistent, regular travel markets to generate the ridership necessary to sustain the service. In consideration of the anticipated level of demand and the inconsistent nature of special event scheduling, it is likely that this travel market would be served more effectively by private charter bus.

Charter bus service is an amenity that is sometimes provided by private community developments or organizations to transport large groups of community members to select events. Charter bus service can be priced on a per hour, per day, or per mile basis depending on the trip details. Trips within the city where the bus is stationed are typically priced on a per hour basis. A review of publicly available information for one charter bus company (GOGO Charters) revealed average per hour/day/mile costs for both charter buses and minibuses. These costs are summarized in Table 7.

Table 7. Average Charter Bus Pricing (GOGO Charters)

<table>
<thead>
<tr>
<th>BUS TYPE</th>
<th>PER HOUR</th>
<th>PER DAY</th>
<th>PER MILE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Charter Bus</td>
<td>$125 - $180</td>
<td>$1,300 - $1,700</td>
<td>$4.00 - $5.50</td>
</tr>
<tr>
<td>Minibus</td>
<td>$125 - $160</td>
<td>$1,200 - $1,500</td>
<td>$4.00 - $5.50</td>
</tr>
</tbody>
</table>

Source: https://gogocharters.com/blog/charter-bus-prices/

As an example, a per passenger cost for a 5-hour rental to downtown Phoenix could be determined as follows:

**Example: 5-hour rental to downtown Phoenix**

\[
\text{Hours} \times \text{Hourly Rate} / \text{Group Size} = \text{Cost per Passenger}
\]

\[
5 \times \$180 / 56 = \$16.07 \text{ per passenger}
\]

It should be noted that these costs are based on a single vendor and that there are numerous companies that offer charter bus service in the region. However, data indicates that a private charter bus service could potentially meet the demands for special event service at a relatively low cost per passenger.
3.7 Operating Assumptions

Operating assumptions were identified for the transit service options in order to develop capital and operating cost estimates. The operating plans are based on Valley Metro’s established standards for service span, frequency, and days of operation for each respective transit mode. As the operating parameters for the microtransit option are dependent on several variables that have yet to be determined (e.g., service delivery model, service area, etc.), no assumptions or cost estimates were developed for this option. Similarly, the charter bus option was excluded from this exercise as that service would be delivered on-demand through a private vendor. The operating assumptions for the transit service options are summarized in Table 8.

Table 8. Operating Assumptions

<table>
<thead>
<tr>
<th>OPTION/MODE</th>
<th>OPERATING DAYS</th>
<th>SERVICE SPAN WEEKDAY / SATURDAY / SUNDAY</th>
<th>HEADWAYS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Neighborhood Circulator</td>
<td>Monday – Friday</td>
<td>12 hours / 0 hours / 0 hours</td>
<td>30 minutes</td>
</tr>
<tr>
<td>Local Bus</td>
<td>Monday – Sunday</td>
<td>16 hours / 14 hours / 12 hours</td>
<td>30 minutes</td>
</tr>
<tr>
<td>Express Bus</td>
<td>Monday – Friday</td>
<td>N/A</td>
<td>2 additional inbound trips</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>2 additional outbound trips</td>
</tr>
<tr>
<td>Limited Stop Bus</td>
<td>Monday – Sunday</td>
<td>16 hours / 14 hours / 12 hours</td>
<td><strong>Scenario 1</strong>&lt;sup&gt;1&lt;/sup&gt;</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Weekday/weekend: 30 minutes</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td><strong>Scenario 2</strong>&lt;sup&gt;1&lt;/sup&gt;</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Weekdays: 15-minute peak, 30-minute base</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Weekends: 30 minutes</td>
</tr>
</tbody>
</table>

Source: Valley Metro, 2019

<sup>1</sup>Based on operating scenarios identified in Valley Metro’s Grand Avenue Transit Feasibility Study (2017)
4.0 COST ESTIMATES

This section details the capital and operating cost estimates for the transit service options. As noted previously, the microtransit and charter bus options were excluded from this analysis.

4.1 Capital Cost Estimates

Capital costs are the fixed, up-front costs associated with the provision of transit services. The primary capital element related to the transit service options is vehicles (other capital elements, such as bus stop infrastructure, would be identified as specific options are advanced). The number of vehicles required for each option ranges from zero for the Route 138 improvements to fifteen for the limited stop bus scenario 2. The vehicle cost estimates for the transit service options are summarized in Table 9.

Table 9. Capital Cost Estimates

<table>
<thead>
<tr>
<th>MODE</th>
<th>ROUTE</th>
<th>VEHICLES REQUIRED</th>
<th>CAPITAL COST1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Circulator</td>
<td>Option 1A</td>
<td>6</td>
<td>$960,000</td>
</tr>
<tr>
<td></td>
<td>Option 1B</td>
<td>6</td>
<td>$960,000</td>
</tr>
<tr>
<td></td>
<td>Option 2</td>
<td>5</td>
<td>$800,000</td>
</tr>
<tr>
<td></td>
<td>Option 3</td>
<td>5</td>
<td>$800,000</td>
</tr>
<tr>
<td>Local Bus - Improvements to Existing Services</td>
<td>106 - Peoria Ave</td>
<td>1</td>
<td>$600,000</td>
</tr>
<tr>
<td></td>
<td>138 - Thunderbird</td>
<td>0</td>
<td>$0</td>
</tr>
<tr>
<td>Local Bus - Route Extensions</td>
<td>138 - Thunderbird</td>
<td>2</td>
<td>$1,200,000</td>
</tr>
<tr>
<td></td>
<td>170 - Bell Rd</td>
<td>2</td>
<td>$1,200,000</td>
</tr>
<tr>
<td>Express Bus</td>
<td>Route 571 – Additional Trips</td>
<td>02</td>
<td>$0</td>
</tr>
<tr>
<td>Limited Stop Bus</td>
<td>Scenario 1 – Base</td>
<td>9</td>
<td>$5,400,000</td>
</tr>
<tr>
<td></td>
<td>Scenario 2 - Enhanced</td>
<td>15</td>
<td>$9,000,000</td>
</tr>
</tbody>
</table>

Source: Valley Metro, 2019

1Based on an assumed vehicle cost of $160,000 for circulator and $600,000 for local, express, and limited stop bus.
2Assumes trips are added during off-peak period when existing express fleet would be available. If trips are added during peak-periods, two additional vehicles would be required.
4.2 Operating Cost Estimates

Operating costs are the annual expenses related to the operation and maintenance of transit services. Transit services in the region are costed on a revenue mile basis and operated by two primary service providers: City of Phoenix and Valley Metro. It is important to note that each of the options include revenue miles in neighboring jurisdictions. As such, cost estimates have been identified for both the study area and for the full route or extension (note: while the circulator options include some miles of service outside the study area, it was assumed the full costs would be attributed to the Sun Cities/Maricopa County as they are localized services that provide circulation within the study area). The operating cost estimates are summarized in Table 10.

Table 10. Operating Cost Estimates

<table>
<thead>
<tr>
<th>TYPE</th>
<th>ROUTE</th>
<th>STUDY AREA</th>
<th>Full Route/Extension</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>ANNUAL REVENUE MILES</td>
<td>NET OPERATING COST¹</td>
</tr>
<tr>
<td>Neighborhood Circulator</td>
<td>Option 1A</td>
<td>198,145</td>
<td>$1,310,136</td>
</tr>
<tr>
<td></td>
<td>Option 1B</td>
<td>185,433</td>
<td>$1,226,085</td>
</tr>
<tr>
<td></td>
<td>Option 2</td>
<td>127,835</td>
<td>$845,245</td>
</tr>
<tr>
<td></td>
<td>Option 3</td>
<td>124,178</td>
<td>$821,064</td>
</tr>
<tr>
<td>Local Bus - Improvements to Existing Services</td>
<td>106 - Peoria Ave</td>
<td>60,826</td>
<td>$412,781</td>
</tr>
<tr>
<td></td>
<td>138 - Thunderbird</td>
<td>4,930</td>
<td>$33,456</td>
</tr>
<tr>
<td>Local Bus - Route Extensions</td>
<td>138 - Thunderbird</td>
<td>25,629</td>
<td>$214,854</td>
</tr>
<tr>
<td></td>
<td>170 - Bell Rd</td>
<td>66,909</td>
<td>$560,904</td>
</tr>
<tr>
<td>Express Bus</td>
<td>Route 571 – Additional Trips</td>
<td>2,530</td>
<td>$16,665</td>
</tr>
<tr>
<td>Limited Stop Bus</td>
<td>Scenario 1</td>
<td>54,780</td>
<td>$445,772</td>
</tr>
<tr>
<td></td>
<td>Scenario 2</td>
<td>85,138</td>
<td>$692,811</td>
</tr>
</tbody>
</table>

Source: Valley Metro, 2019

¹Includes complementary ADA service (assumes 20 percent of gross operating cost) for all options except the local bus improvements and the express bus, which would not require these services. Also assumes 15 percent farebox recovery for all modes except neighborhood circulator, which is assumed to operate fare-free.
5.0 FUNDING ANALYSIS

This section focuses on the funding component of transit service and includes an overview of transit funding in the region and the identification of potential funding solutions for the Northwest Valley Sun Cities. Each of these components is explored in greater detail in the following sections.

5.1 Existing Transit Funding Sources

This section provides an overview of local, regional, state, and federal sources that help fund transit services in the region.

5.1.1 Local Funding

Local funding sources cover the majority of the transit operating costs in the region. In FY 2019, 69 percent of transit operations costs in the region were funded through local sources, while just 23 percent were funded through Proposition 400. Local transit funding sources range from money allocated from a jurisdiction's general fund to a transit or transportation-dedicated sales tax. Some of these taxes are used exclusively for transit improvements, while others are more general transportation taxes of which only a portion goes to transit. By implementing a dedicated tax and thereby establishing a sustainable funding source, cities are signaling their commitment to providing quality transit services. Voters have consistently supported these measures, approving such initiatives at both the city and regional level. A history of local and regional dedicated sales tax initiatives in Maricopa County is provided in Figure 32.

5.1.2 Public Transportation Fund

Regional revenues programmed to support projects in the Regional Transportation Plan (RTP) come from the half-cent Maricopa County Transportation Excise Tax, also known as Proposition 400. Proposition 400 was passed by voters in 2004 and its funding is used to implement the 2003 Regional Transportation Plan developed by the regional transportation planning agency, MAG. The revenues are distributed to the region’s Freeway, Arterial and Transit life cycle programs that serve as the management tools for Proposition 400 investments. The Transit Life Cycle Program (TLCP) receives 33.3% of the sales tax revenues, which are deposited into the Public Transportation Fund (PTF). This distribution is defined in Arizona Revised Statutes §42-6105. By policy of the Regional Public Transportation Authority (RPTA) Board of Directors, the transit share is further distributed between the bus and light rail/high capacity programs. The bus program receives 56.76% of the transit funds and light rail/high capacity program receives 43.24%. PTF is spent on regional capital and operating projects, including local and express fixed route service and complementary paratransit service as mandated by the ADA. Local (non-ADA) dial-a-ride services and circulator/neighborhood connector services were not identified for regional investments in the 2003 Regional Transportation Plan and therefore do not qualify for PTF funds. As the Valley Metro Board of Directors is responsible for the PTF, project funding requests or changes generally need to meet the adopted Valley Metro Transit Standards and Performance Measures and pass through the committee process for Board approval.

With the regional half-cent sales tax set to expire December 2025, MAG has begun discussions for an extension of the regional sales tax and are planning for a new measure to go before voters as early as November 2022.
Figure 32. Local and Regional Sales Tax History

Maricopa County Proposition 300
County-wide sales tax for highways, roads, and transit

- **Tax rate**: 0.5%
- **Sunset date**: 2005

Scottsdale
Tax for transit and other transportation projects

- **Tax rate**: 0.2%
- **Sunset date**: In perpetuity

Tempe
Tax for transit services only

- **Tax rate**: 0.5%
- **Sunset date**: In perpetuity

Mesa
Tax for transit, parks and recreation, and police and fire departments

- **Tax rate**: 0.5%
- **Sunset date**: In perpetuity

Phoenix
Tax for transit services only

- **Tax rate**: 0.4%
- **Sunset date**: 2020

Glendale
Tax for transit and other transportation projects

- **Tax rate**: 0.5%
- **Sunset date**: In perpetuity

Maricopa County Proposition 400
Extended sales tax passed in 1985. Tax for highways, roads, and transit

- **Tax rate**: 0.5%
- **Sunset date**: 2025

Peoria
Tax for transit and other transportation projects

- **Tax rate**: 0.3%
- **Sunset date**: In perpetuity

Phoenix
Raised and extended sales tax passed in 2000. Tax for transit service and street improvements

- **Tax rate**: 0.7%
- **Sunset date**: 2050

Source: HDR, 2020
5.1.3 Passenger Fares

The fares collected from passengers represent another important source of funding for transit services. The farebox recovery rate is the proportion of the total operating cost recovered by passenger fares. Although farebox recovery rates vary between transit modes and even among individual routes, they only cover a fraction of the cost to operate services. As reported in Valley Metro’s FY 2019 Transit Performance Report, farebox recovery rates were as follows:

- Fixed-route bus: 12.8%
- Light rail: 22.7%
- Paratransit: 5.7%
- System total: 13.8%

In recent years, transit agencies have begun exploring the viability of fare-free service to both ensure equity and potentially boost ridership. Cities including Olympia, Washington and Kansas City, Missouri have implemented such programs, with agencies in several other cities considering following suit. The experiences of these cities will determine whether such programs become more common in the industry. However, considering the inconsistencies in transportation funding throughout the United States, most agencies are likely unwilling or unable to give up an existing funding source, regardless of the scale.

5.1.4 Advertising Revenue

Selling advertising space on transit facilities (bus stops, transit centers, etc.) and vehicles represents another source of funding. According to the Transit Cooperative Research Program (TCRP) report Practical Measures to Increase Transit Advertising Revenues (2009), sales of advertising in transit facilities and on vehicles generates approximately $500 million in revenue to transit agencies nationwide each year, and the industry is well positioned to grow. Although on average accounting for less than five percent of transit agencies’ operating funds, transit advertising allows communities to leverage transit infrastructure to help fund the continued operation of transit services.

5.1.5 Arizona Lottery Funds

Arizona Lottery Funds (ALF) are revenues generated by the Arizona State Lottery for the support of public transportation services. The transportation fund was created as a part of the state implementation plan to meet ambient air quality standards as required by the Clean Air Act. Valley Metro member agencies with a population of 300,000 or more are required to spend all their ALF funds on transit services. Agencies of 60,000 – 300,000 must commit at least one-third of their funds to transit, and those with less than 60,000 are required to commit three-quarters of their funds to transit. In March 2010, the State legislature repealed a large portion of money ($22 million annually in Maricopa County out of $34 million statewide) that had supported public transportation services in the Valley for 30 years. In late 2011, a judicial ruling restored the lottery funding for transportation and designated the funding to be passed to the PTF, of which RPTA is the designated financial administrator. Funds are available to agencies each year and require an annual application and accounting documentation to prove that funds were spent appropriately.

5.1.6 FTA Section 5310 – Formula Grants for the Enhanced Mobility of Seniors and Individuals with Disabilities

The Section 5310 program provides funding for services that improve the mobility of seniors and individuals with disabilities. Eligible projects under this program include both traditional capital investments (e.g., buses and vans, wheelchair lifts, etc.) and non-traditional investments (e.g., travel training, volunteer driver programs, etc.) beyond ADA complementary paratransit services. Section 5310 funds require a 20 percent local match of the net project cost for capital expenditures. MAG is responsible for distributing Section 5310 formula funds.
received from the Federal Transit Administration for the Phoenix-Mesa Urbanized Area, using a technical committee to prioritize grant fund applications for capital and operating expenses.

5.1.7 FTA Section 5339 – Bus and Bus Facilities

This federal program provides eligible recipients with capital funding to replace, rehabilitate, and purchase buses and to construct bus-related facilities. Section 5339 funds are limited to capital projects and thus cannot be used for operating assistance. Capital funds under Section 5339 are programmed by MAG through the Transportation Improvement Program (TIP) and follow MAG’s programming guidelines. Section 5339 funds require a 20 percent local match of the net project cost for capital expenditures.

5.2 Potential Funding Solutions

For communities just beginning to consider transit services, the scale of the annual operating costs is the primary barrier to implementation. The stark reality of transit funding in the region is that a majority of the operating costs are covered by local sources. As reported in MAG’s Transit Funding Policy Memorandum (September 2020), 69 percent of transit operations costs in the region were funded through local sources. Furthermore, of the 60 local bus routes operating in the system in 2019, only 6 (10 percent) were funded entirely through Proposition 400, 23 (38 percent) were partially funded through Proposition 400, and 31 (52 percent) were funded entirely through local sources. While MAG has begun initial discussions for the extension of the regional sales tax set to expire in 2025, regional sources alone will continue to be insufficient in funding a comprehensive transit system. Considering this reality, identifying a sustainable local funding source is essentially a requirement for communities wishing to implement transit services.

The funding solutions outlined in this section include both an approach to establishing a local transportation fund in the Northwest Valley Sun Cities and recommendations for how the communities can work with neighboring cities and MAG to incorporate qualified transit projects in the next RTP. These options are not mutually exclusive. Instead, both can and should be leveraged to expand transit options in the study area.

5.2.1 Establish a Dedicated Local Transportation Fund in Sun City/Sun City West

Establishing a dedicated local transportation fund would provide the Northwest Valley Sun Cities with the most autonomy in the transit decision-making process. As unincorporated communities in Maricopa County, the Northwest Valley Sun Cities cannot levy a dedicated transportation tax without incorporating or creating a special purpose taxing district. Communities wishing to incorporate must demonstrate the people in the community expressly desire to incorporate, either through direct petition or an election. The county board of supervisors considers and is the ultimate agency to grant final incorporation to the community.

Special taxing districts are created to fill a specific need or to enable the provision of services in an area. In forming a special taxing district, a funding stream is created by those benefiting from the services needed or desired. While the process differs based on the circumstances, creation of a special taxing district requires submission of a petition to the county board of supervisors, followed by a public hearing and election. The county board of supervisors has the authority to deny requests for special taxing districts.

Another approach to establishing a local transportation fund in the Northwest Valley Sun Cities is to implement a transportation-dedicated fee as part of or in addition to annual association assessments. As detailed on the Sun City website, “the Facilities Agreement, executed by each Deeded Real Estate Owner in Sun City AZ, obligates Owners to pay annual property assessments to the Recreation Centers of Sun City, Inc. (RCSC) whether or not Owners occupy the Sun City AZ or use RCSC facilities.” The 2020 annual community fees for Sun City and Sun City West are $496 and $960 respectively. As illustrated in Figure 33, these fees are substantially lower than other Sun City communities both in Arizona and throughout the country.
Figure 33. Annual Community Fees (2020)

Sun City, AZ: $496
Sun City West AZ: $960
Sun City Aliante, NV: $1,188
Sun City Georgetown, TX: $1,200
Sun City Grand, AZ: $1,511
Sun City Huntley, IL: $1,524
Sun City Lincoln Hills, CA: $1,596
Sun City Festival, Buckeye, AZ: $1,740
Sun City Mesquite, NV: $1,848
Sun City Oro Valley, AZ: $1,865
Sun City Apple Valley, CA: $2,208
Sun City Hilton Head, SC (Old): $2,268
Sun City Hilton Head, SC (New): $3,036
Sun City Palm Desert, CA: $3,132
Sun City Carolina Orchards, SC: $3,240
Sun City Shadow Hills, CA: $3,276
Sun City Carolina Lakes, SC: $3,300

Source: https://suncityaz.org/discover/fees/
In effort to better understand the scale of funding required, a cost per household was developed for each of the transit service options under consideration. As each of the options include revenue miles in other jurisdictions, costs were identified for both the study area and for the full route or extension (note: while the circulator options include some miles of service outside the study area, it was assumed the full costs would be attributed to the Sun Cities/Maricopa County as they are localized services that provide circulation within the study area). As summarized in Table 11, the annual cost per household for the miles of service in the study area is relatively modest and ranges from $1 to $34. Furthermore, the annual cost per household required to fund the full route or extension (including revenue miles in other jurisdictions) ranges from $4 to $180. The exact fee could be adjusted over time as additional transit services are needed and to account for general inflation.

Table 11. Cost per Occupied Household (2020)

<table>
<thead>
<tr>
<th>Type</th>
<th>Route</th>
<th>ESTIMATED ANNUAL COST PER HOUSEHOLD¹</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>STUDY AREA</td>
</tr>
<tr>
<td><strong>EXISTING SERVICE</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local Bus Improvements</td>
<td>106 - Peoria Ave</td>
<td>$11</td>
</tr>
<tr>
<td></td>
<td>138 - Thunderbird</td>
<td>$1</td>
</tr>
<tr>
<td>Express Bus Improvements</td>
<td>Route 571 (additional trips)</td>
<td>$1</td>
</tr>
<tr>
<td><strong>NEW SERVICE</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Neighborhood Circulator</td>
<td>Option 1A</td>
<td>$34</td>
</tr>
<tr>
<td></td>
<td>Option 1B</td>
<td>$32</td>
</tr>
<tr>
<td></td>
<td>Option 2</td>
<td>$22</td>
</tr>
<tr>
<td></td>
<td>Option 3</td>
<td>$22</td>
</tr>
<tr>
<td>Local Bus Extensions</td>
<td>138 - Thunderbird</td>
<td>$6</td>
</tr>
<tr>
<td></td>
<td>170 - Bell Rd</td>
<td>$15</td>
</tr>
<tr>
<td>Limited Stop Bus</td>
<td>Scenario 1</td>
<td>$12</td>
</tr>
<tr>
<td></td>
<td>Scenario 2</td>
<td>$18</td>
</tr>
</tbody>
</table>

Source: Valley Metro, 2020; ACS, 2018

¹Assumes 38,646 occupied households in Sun City/Sun City West (ACS, 2018). All costs in 2019 dollars

5.2.2 Work with Neighboring Communities and MAG to Program Qualified Transit Options in the Next Regional Transportation Plan

Another potential funding solution for the Northwest Valley Sun Cities is to work with neighboring communities and MAG to program qualified transit options in the next RTP. As a regional initiative, transit projects that are programmed in the RTP must provide regional connectivity. As such, neighborhood circulator services are not eligible for funding under Proposition 400. However, the other transit service options, including the local bus extensions and the express and limited stop services, may be good candidates for inclusion in the next RTP as they promote regional connectivity. As preparations for the Proposition 400 extension effort continue, the Northwest Valley Sun Cities should coordinate with the county and neighboring cities that would be impacted by these potential future services (i.e., Surprise, Peoria, El Mirage, and Glendale).
6.0 FINAL PUBLIC MEETING

Upon conclusion of the project technical work, a public meeting was held to gather feedback from Northwest Valley Sun Cities’ residents on the transit service options and potential funding solutions. Public meetings were initially scheduled for March 2020 in both Sun City and Sun City West but were postponed due to the COVID-19 pandemic. After consulting with key stakeholders and in consideration of public health measures, the decision was made to hold a virtual public meeting. The public meeting occurred on Thursday, September 10 at 2:30 p.m. and was advertised in the Sun Cities recreation center newsletter and with a paid promotion post on Facebook that geo-targeted the Sun Cities. Valley Metro also advertised and posted about the meeting on its website and other social media channels. A total of 68 participants registered for the public meeting, with 56 in attendance. Supplementary documents were provided on the project website, as was a recording of the meeting upon its conclusion.

Meeting attendees were also directed to take a survey to express their preferences on the proposed transit options and their opinions on the funding solutions summarized in Section 5.2. The survey was hosted on Survey Monkey and was open from September 1 through October 5, 2020. A total of 49 valid surveys were collected as a result of this effort. Some key findings from the survey include:

- The service option that most respondents indicated was their first preference was the neighborhood circulator (31%).
- The service option that most respondents indicated was their second preference was the local bus route extensions (23%), followed by the neighborhood circulator (14%) and limited stop bus (14%).
- A majority of respondents (59%) indicated they would support establishing a dedicated local transit/transportation fund in the Northwest Valley Sun Cities area.
- Of those respondents, the maximum average annual fee they were willing to pay was $65 per household.

Though the sample size was small, the results suggest a potential priority of transit improvements and a willingness to develop a local, sustainable funding source in the Northwest Valley Sun Cities.
7.0 CONSIDERATIONS FOR FUTURE TRANSIT

This report provided a comprehensive evaluation of the existing conditions in the Northwest Valley Sun Cities and identified a variety of transit options that could help improve mobility both within the communities and throughout the region. It also described the reality of transit funding in the region, which remains the biggest obstacle to expanding transit options. The funding issue is not insurmountable however, as the actions detailed in Section 5.2 describe various approaches to developing a sustainable local funding source, thereby giving the Northwest Valley Sun Cities more autonomy in the transit decision-making process. Of course, any such action would require the overwhelming support of the community. As such, the future of transit in the Northwest Valley Sun Cities very much lies in the hands of its residents.

In the event that funding is identified, careful consideration must be given to which options are selected for implementation. There is no “one-size-fits-all” solution in transit. Instead, transit services must be context-specific, with the mode and service area determined by land use, development patterns, street network, anticipated travel market and demand, and a host of other factors. The predominantly single-family residential development patterns and circuitous roadway network in the Northwest Valley Sun Cities make it difficult to serve with traditional transit services that primarily operate on arterial roadways. As such, the local, express, and limited stop service options described in Section 3.0 would do little to improve the mobility of Sun Cities residents without a complementary feeder service that delivers passengers to these transit nodes. Such a service could take the shape of a microtransit program, neighborhood circulator, or even a community-based solution like a formalized golf cart park-and-ride. These would be appropriate first steps in developing a transit network in the Northwest Valley Sun Cities.

Moving forward, the Northwest Valley Sun Cities should continue to engage the public in their transit efforts and work to build grassroots support for a potential funding solution. Coordinating efforts with adjacent communities will also be key to maintaining momentum in the development of the next RTP.