



TransNet Triennial Performance Audit Recommendation Completion Form

TPA Year:

Item Number:

Audit Recommendation:

Enhance the Story Map tool, TransNet project status listing (shown in Appendix A), or develop a different tool to capture project output details and track TransNet accomplishments over time by implementing the following:
b. Building upon planned output data currently captured through the Regional Transportation Improvement Program’s automated ProjectTrak database and reported in the Annual Output and Outcome report by reconciling those planned outputs with actual accomplishments. Consider requiring local jurisdictions to provide a closeout report with updated, actual data as projects are completed.

Justification for Completion:

Requesting Committee approval to:
Close the recommendation since current reports are providing the project updates based on the data that is available. SANDAG is upgrading ProjectTrak to be more efficient, with completion anticipated in FY 2028. SANDAG commits to providing updates periodically and as requested on the status of updates to ProjectTrak.

It was determined that standardizing the data and KPIs county-wide is not currently feasible due to:
- The Local Agencies utilizing their own systems to measure streets and roads data (as discussed in closed 2018 Recs 5a, 5b, 5d).
- Local Agencies’ unwillingness to contribute to a county-wide system (For example as discussed in closed 2018 Recs 12a and 12b).
- As such, development of single report cleanly comparing all entities is not feasible. The Story Mapping technique is still best option.
- However, the data that is available for each agency has been and will continue to be used for reporting and geographical mapping of project progress.

SANDAG’s Financial Programming Team is currently working on an upgrade to ProjectTrak that will:
- Incorporate the Annual Report that is submitted by the Local Agencies regarding TransNet funding and projects.
- Allow Local Agencies to input their data directly into ProjectTrak.
- Provide data that can then be compared to the Local Agencies’ Output/Outcome report.
- Of note, it would be data similar to what currently exists. However, the update(s) is/are anticipated to make entry more efficient and technologically advanced. Completion is anticipated in FY 2027.

***Supporting Documents: Please attach any supporting documents or provide related links**

Approvals

Internal Control Signature:

Shawni Pickney-Forest

Date:

02/17/2026

PM Signature:

Richard Radcliffe

Date:

02/17/2026

Director Signature:

Susan Huntington

Date:

02/17/2026

ITOC Approval: Yes:

No:

Meeting Date:

Agenda Number:

Meeting Link:



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Audit Recommendation:

Enhance organization of Peer Review Process supporting documents by providing a corresponding table to capture topics discussed, reference items to checklists, and close out memos to better link what was planned, what was done, and how issues were addressed

Justification for Completion:

SANDAG has enhanced its Peer Review Process (PRP) by implementing the following:
- Developing an SOP – Peer Review Process (PRP) – that outlines the roles and responsibilities and procedures for review related to the PRP. Notably, procedures include PRP initiation, meeting, documentation, and closeout guidelines. The SOP also references a PRP Initiation Checklist.
- Adding a summary table in the PRP documentation that include key PRP questions, discussion narratives, and a table summarizing key questions, action items, and resolutions.

***Supporting Documents:** Please attach any supporting documents or provide related links

Approvals

Internal Control Signature:

Shawnee Pickney-Forrest
SHAWNEE PICKNEY-FORREST (SANDAG, 3T)

Date:

02/13/2026

PM Signature:

Mike Duncan

Date:

02/13/2026

Director Signature:

[Signature]

Date:

02/13/2026

ITOC Approval: Yes:

No:

Meeting Date:

Agenda Number:

Meeting Link:



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Audit Recommendation:

Implement shorter-term steps to report on performance, while waiting on the longer-term Transportation Performance Management Framework, including continued development of SANDAG’s proposed “Goals and Provisions” document to distribute to the Board and ITOC.

Justification for Completion:

In response to the TransNet 2018 Audit, SANDAG hired a consultant to develop a Transportation Performance Management Framework. The purpose was to identify ways in which to present data for the TransNet Ordinance goals of relieving traffic congestion, improving safety, expanding routes, maintaining and improving local roads, increasing transit for seniors and disabled people and expanding commuter bus, trolley, and coaster services. The Framework in the deliverable identified suggestions, however, some were not feasible given the availability of when data is available. Subsequently, the Goals and Provision document was tabled with the report.

However, SANDAG has implemented some of the items suggested as short-term actions for tracking and reporting progress. The short-term suggestions have been integrated into SANDAG’s ongoing reporting such as the Traffic Safety Dashboard (<https://opendata.sandag.org/stories/s/5f7y-nefe>) and the State of the Commute Report (<https://opendata.sandag.org/stories/s/2024-State-of-the-Commute/dyus-9yxv/>).

***Supporting Documents: Please attach any supporting documents or provide related links**

Approvals

Internal Control Signature:

Shawni Pickney-Forest

Date:

02/18/2026

PM Signature:

Joaquin Ortega

Date:

02/18/2026

Director Signature:

[Signature]

Date:

02/18/2026

ITOC Approval: Yes:

No:

Meeting Date:

Agenda Number:

Meeting Link:



TransNet Triennial Performance Audit Recommendation Completion Form

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Audit Recommendation:

Ensure decisions made regarding funding MTS’ and NCTD’s transit operating service gaps or frequency expectations are documented with rationale supporting decisions and incorporated into Ordinance amendments as warranted.

Justification for Completion:

Staff from MTS, NCTD, and SANDAG discuss transit performance metrics at the quarterly Regional Short-Range Transit Planning Task Force (Task Force) meetings. Beginning in October 2025, the Task Force meetings include an ongoing agenda item for discussing decisions made regarding funding MTS and NCTD transit operating service gaps and/or frequency expectations, which are reflected in the attached meeting agenda and minutes (Item #5).

***Supporting Documents: Please attach any supporting documents or provide related links**

Approvals

Internal Control Signature:

Shaunae Pickney-Forrest

Date:

Jan 23, 2026

PM Signature:

Brian Lane

Date:

Jan 23, 2026

Director Signature:

Antoinette Meier
Antoinette Meier (Jan 23, 2026 10:15:44 PST)

Date:

Jan 23, 2026

ITOC Approval: Yes:

No:

Meeting Date:

Agenda Number:

Meeting Link:



TransNet Triennial Performance Audit Recommendation Completion Form

TPA Year:

Item Number:

Audit Recommendation:

Present proposed amendment to the Board to align planned major corridor projects from the TransNet Ordinance with the current 2021 Regional Plan as required by the TransNet Ordinance.

Justification for Completion: *(Continued on next page)*

The recommendation advised SANDAG to present a proposed Ordinance amendment to the Board aligning planned Major Corridor projects from the TransNet Ordinance with the 2021 Regional Plan.

Staff presented an update on the TransNet Plan of Finance for the Major Corridor subprogram to the Board of Directors at the Board Retreat in May 2025. (FileStream.ashx) The update provided an overview of existing revenues and remaining costs associated with the Major Corridor program, as listed in the TransNet Expenditure Plan and costs from the 2021 Regional Plan.

However, the 2021 Regional Plan expired in January 2026 and SANDAG is no longer required to comply with the 2021 Regional Plan. The 2025 Regional Plan, passed by the Board in December 2025 (SANDAG - 2025 Regional Plan), is the new Plan that SANDAG is required to comply with. As such, SANDAG will not be pursuing an Ordinance amendment to align Major Corridor projects with the 2021 Regional Plan.

SANDAG will continue to explore possible options for the TransNet Ordinance to ensure alignment with the 2025 Regional Plan and ITOC will be informed of the timeline for that effort once it is developed.

***Supporting Documents: Please attach any supporting documents or provide related links**

Approvals

Internal Control Signature:

Shaunee Pickney-Forest

Date:

02/11/2026

PM Signature:

Danielle Kochman
Danielle Kochman (Feb 11, 2026 16:12:54 PST)

Date:

02/11/2026

Director Signature:

Susan Huntington

Date:

02/11/2026

ITOC Approval: Yes:

No:

Meeting Date:

Agenda Number:

Meeting Link:

TPA Year: 2024

Item Number: 12

Justification for Completion:

The recommendation advised SANDAG to present a proposed Ordinance amendment to the Board aligning planned Major Corridor projects from the TransNet Ordinance with the 2021 Regional Plan.

Staff presented an update on the TransNet Plan of Finance for the Major Corridor subprogram to the Board of Directors at the Board Retreat in May 2025. ([FileStream.ashx](#)) The update provided an overview of existing revenues and remaining costs associated with the Major Corridor program, as listed in the TransNet Expenditure Plan and costs from the 2021 Regional Plan.

However, the 2021 Regional Plan expired in January 2026 and SANDAG is no longer required to comply with the 2021 Regional Plan. The 2025 Regional Plan, passed by the Board in December 2025 ([SANDAG - 2025 Regional Plan](#)), is the new Plan that SANDAG is required to comply with. As such, SANDAG will not be pursuing an Ordinance amendment to align Major Corridor projects with the 2021 Regional Plan.

SANDAG will continue to explore possible options for the TransNet Ordinance to ensure alignment with the 2025 Regional Plan, and ITOC will be informed of the timeline for that effort as it is developed.



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TPA Year:

Item Number:

Audit Recommendation:

Develop, implement, and use a format, transparent, and vetted methodology and strategy for reprioritizing pledged ongoing and future TransNet major corridor projects against limited funding – including how funds are moved between projects and factors are weighed for starting new projects when other ongoing projects may have unmet funding needs.

Justification for Completion:

Based on Board and public feedback, SANDAG has developed, vetted, and implemented a formal strategy for reprioritizing pledged ongoing and future TransNet major corridor projects. The methodology was presented and used during the November 7, 2025 Board of Directors (BOD) Meeting in Agenda items 5.1 and 5.2. (<https://pub-sandag.escribemeetings.com/Meeting.aspx?Id=5b8b7fbd-ebe3-4476-ab84-1644231be756&Agenda=PostMinutes&lang=English>)

In summary, the methodology details the criteria and key approaches for prioritizing project delivery. The criteria used are: 1) safety; 2) past commitments; 3) subregional spread; 4) TransNet major corridors; 5) mobility needs; 6) Segmenting for construction; 7) efficient transit; 8) flexibility and stability; and 9) maintenance and operations considerations. The key approaches used are practical phasing, holding formula funds, contingency, and innovative funding strategies. <described on pg. 23 of Agenda Packet>

The methodology was implemented in Item 5.2 of the same meeting regarding the State Transportation Improvement Program (STIP). As part of the plan, project considerations included the criteria and key approaches discussed. Notably; 1) Practical Phasing by focusing on projects ready to go to construction; 2) past commitments by focusing on projects currently programmed in STIP; and 3) TransNet major corridors by focusing on TransNet priority projects. <Item 5.2 pg. 41>

***Supporting Documents: Please attach any supporting documents or provide related links**

Approvals

Internal Control Signature:

Shawnee Pickney-Forrest
(SANDAG Board of Directors, Board Member, District 3)

Date:

02/13/2026

PM Signature:

Michelle Smith

Date:

02/13/2026

Director Signature:

Susan Huntington

Date:

02/13/2026

ITOC Approval: Yes:

No:

Meeting Date:

Agenda Number:

Meeting Link:



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Audit Recommendation:

Set timelines for local agency consensus on proposed Ordinance amendments and then take the related amendments to the Board for consideration soon after.

Justification for Completion:

SANDAG established timelines for local agencies to discuss, draft, and present final ordinance amendments to the Board and ITOC.

SANDAG created the Mobility Working Group (MWG) to support activities related to the implementation of the 2021 Regional Plan, inclusive of member agency discussions regarding Ordinance Amendments.

SANDAG also outlined a timeline for completion as part of the MWG Work Plan commencing discussions on ordinance amendments in Summer/Fall 2022 with completion in Spring/Summer 2023. (Example: 7.14.2022 MWG Ordinance Amendments PPT and 9.8.2022 MWG Ordinance Amendments PPT.)

Additionally, SANDAG published a report, dated 3.27.24, summarizing the voting conclusions of the ordinances presented.

***Supporting Documents: Please attach any supporting documents or provide related links**

Approvals

Internal Control Signature:

Shawni Pickney-Forest

Date:

02/17/2026

PM Signature:

Danielle Kochman
Danielle Kochman (Feb 17, 2026 16:11:26 PST)

Date:

02/17/2026

Director Signature:

Susan Huntington

Date:

02/17/2026

ITOC Approval: Yes:

No:

Meeting Date:

Agenda Number:

Meeting Link:



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Audit Recommendation:

Immediately propose the amendments to the Board for the ITOC changes and other areas relating to the prior audit recommendations.

Justification for Completion:

SANDAG has presented proposed ordinance amendments to address ITOC membership and selection between March 2023 and July 2025. Redline edits were presented in ITOC agenda items in January 2024 for expansion of the selection committee, Item 7 (<https://pub-sandag.escribemeetings.com/FileStream.ashx?DocumentId=3323>). In the February 2025 ITOC agenda, Item 12 (<https://pub-sandag.escribemeetings.com/FileStream.ashx?DocumentId=3219>), those redlines were removed.

Additionally, language in the Draft ITOC 2025 Annual Report (July 2025) included an ITOC Goal (#2) that stated, "draft amendments are expected to be presented to the SANDAG Board of Directors in Fiscal year 2026." In the final ITOC 2025 Annual Report (September 2025), the goal was edited to, "The committee directed staff to explore an administrative process that would resolve the quorum issue without requiring a formal ordinance amendment, while keeping the option for a future amendment open if needed. for expansion of selection committee.

***Supporting Documents: Please attach any supporting documents or provide related links**

Approvals

Internal Control Signature:

Shawné Pickney-Forest

Date:

02/17/2026

PM Signature:

Danielle Kochman
Danielle Kochman (Feb 17, 2026 16:04:31 PST)

Date:

02/17/2026

Director Signature:

Susan Huntington

Date:

02/17/2026

ITOC Approval: Yes:

No:

Meeting Date:

Agenda Number:

Meeting Link: