MEETING NOTICE
AND AGENDA

BOARD OF DIRECTORS
INFORMATION SESSION
ON PROPOSED NEW FARE ORDINANCE
AND TRANSIT FARES

Friday, May 8, 2009
9 to 10 a.m.

SANDAG, Conference Room 8A
401 B Street, Suite 800
San Diego, CA 92101-4231

Staff Contact: Dan Levy
(619) 699-6942
dle@sandag.org

AGENDA HIGHLIGHTS

• SANDAG and transit agency staffs will be available to answer questions from Board members, member agency staffs, and members of the public on the proposed new Regional Comprehensive Fare Ordinance and transit fares.

NOTE: This is an optional session. Discussion and the second reading and adoption of the proposed new Fare Ordinance is scheduled for the May 8, 2009, Board of Directors Meeting beginning at 10 a.m.

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BOARD OF DIRECTORS
AGENDA

Friday, May 8, 2009
10 a.m. to 12 noon
SANDAG Board Room
401 B Street, 7th Floor
San Diego

AGENDA HIGHLIGHTS

• SECOND READING OF NEW REGIONAL COMPREHENSIVE FARE ORDINANCE
• FUTURE CONGESTION MANAGEMENT PROGRAM PROCESS
• PRESENTATION FROM SAN DIEGO COUNTY WATER AUTHORITY

PLEASE TURN OFF CELL PHONES DURING THE MEETING

YOU CAN LISTEN TO THE BOARD OF DIRECTORS MEETING BY VISITING OUR WEB SITE AT WWW.SANDAG.ORG

MISSION STATEMENT
The 18 cities and county government are SANDAG serving as the forum for regional decision-making. SANDAG builds consensus, makes strategic plans, obtains and allocates resources, plans, engineers, and builds public transit, and provides information on a broad range of topics pertinent to the region’s quality of life.

San Diego Association of Governments · 401 B Street, Suite 800, San Diego, CA 92101-4231
(619) 699-1900 · Fax (619) 699-1905 · www.sandag.org
Welcome to SANDAG. Members of the public may speak to the Board of Directors on any item at the time the Board is considering the item. Please complete a Speaker’s Slip, which is located in the rear of the room, and then present the slip to the Clerk of the Board seated at the front table. Also, members of the public are invited to address the Board on any issue under the agenda item entitled Public Comments/Communications/Member Comments. Speakers are limited to three minutes. The Board of Directors may take action on any item appearing on the agenda.

This agenda and related staff reports can be accessed at www.sandag.org under Meetings on the SANDAG Web site. Public comments regarding the agenda can be forwarded to SANDAG via the e-mail comment form also available on the Web site. E-mail comments should be received no later than 12 noon, two working days prior to the Board of Directors meeting.

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ITEM # | RECOMMENDATION
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1. | PUBLIC COMMENTS/COMMUNICATIONS/MEMBER COMMENTS

Members of the public shall have the opportunity to address the Board on any issue within the jurisdiction of SANDAG that is not on this agenda. Anyone desiring to speak shall reserve time by completing a “Request to Speak” form and giving it to the Clerk of the Board prior to speaking. Public speakers should notify the Clerk of the Board if they have a handout for distribution to Board members. Speakers are limited to three minutes. Board members also may provide information and announcements under this agenda item.

REPORTS (2 through 4)

+2. | SECOND READING OF NEW REGIONAL COMPREHENSIVE FARE ORDINANCE (Dan Levy)
HOLD SECOND READING AND ADOPT

Metropolitan Transit System (MTS) has declared a fiscal emergency and has taken action to reduce expenditures due to funding cutbacks from the State of California and falling sales tax revenue. The MTS Board has approved a strategy that includes $4.7 million in savings from service reductions and $2.2 million from addition revenue resulting from increases to Regional and Premium Pass prices, elimination of the downtown Trolley Zone, and discontinuing Community and Local Circulation special fares. Staff also has completed a revision of the Regional Fare Ordinance to reflect the various changes needed to accommodate the implementation of the Compass Card. The Board of Directors is asked to hold the second reading and adopt a new Regional Comprehensive Fare Ordinance that would implement fare increases requested by MTS and other clarifying changes.

+3. | FUTURE CONGESTION MANAGEMENT PROGRAM PROCESS (Second Vice Chair Jack Dale, Transportation Committee Chair; Heather Werdick)
APPROVE

SANDAG is required by state law to prepare and regularly update a Congestion Management Program (CMP) for the San Diego region. The last CMP update was adopted by SANDAG in November 2008. Staff evaluated two strategies for future CMPs. One strategy is to streamline the state CMP process and the other is to opt out of the state CMP process. SANDAG will continue to follow the federal congestion management process through ongoing planning activities. The Transportation Committee recommends that the Board of Directors direct staff to work with local jurisdictions to prepare resolutions electing to opt out of the state Congestion Management Program.
4. PRESENTATION FROM SAN DIEGO COUNTY WATER AUTHORITY
(Paul Lanspery, San Diego County Water Authority)

Paul Lanspery, Deputy General Manager of the San Diego County Water Authority, will provide the Board of Directors with an update on the current water supply situation in the San Diego region and the potential impact on water rates.

5. UPCOMING MEETINGS

The next Business meeting of the Board of Directors is scheduled for Friday, May 22, 2009, at 9 a.m. The next Policy meeting of the Board of Directors is scheduled for Friday, June 12, 2009, at 10 a.m.

6. ADJOURNMENT

+ next to an agenda item indicates an attachment
* next to an agenda item indicates a San Diego Regional Transportation Commission item
The Board of Directors is asked to conduct the second reading of a new Regional Comprehensive Fare Ordinance (Fare Ordinance) that implements fare increases requested by the Metropolitan Transit System (MTS) as well as new language that clarifies, simplifies and better codifies the fare rules for the region. The proposed new Fare Ordinance does not include any fare increases to the products that are purchased by the public beyond those requested by MTS and addressed in two public hearings held by the Transportation Committee on April 15, 2009, and April 17, 2009. The proposed changes in the language of the Fare Ordinance have been discussed with and approved by the staffs of both MTS and the North County Transit District (NCTD). The Board of Directors held the first reading of the new Fare Ordinance at the April 24, 2009, meeting.

MTS has declared a fiscal emergency and has taken action to reduce expenditures due to funding cutbacks from the State of California and falling sales tax revenue. The MTS Board also asked its staff to consider fare increases as a means of reducing the amount of transit service that would have to be eliminated to create a balanced budget. The MTS Board has approved a strategy that includes $4.7 million in savings from service reductions and $2.2 million from additional revenue resulting from increases to Regional and Premium Pass prices, elimination of the downtown Trolley Zone, and discontinuing Community and Local Circulation special fares. In a letter dated March 25, 2009 (Attachment 2), MTS requested that SANDAG initiate these fare changes. The changes require an amendment to the Fare Ordinance with an effective date of July 1, 2009, in order for MTS to achieve a balanced FY 2010 budget. About $50,000 of additional revenue will accrue to NCTD through revenue sharing as a result of these changes.

The proposed fare changes being discussed were posted in English and Spanish on all MTS and NCTD services in advance of the two public hearings. In addition, advertisements were placed in English and Spanish language newspapers.

On April 24, 2009, the Board of Directors made a finding that that the proposed fare changes in the Fare Ordinance qualify for an exemption under the California Environmental Quality Act. The Board also made a finding pursuant to Title VI of the Civil Rights Act that the proposed fare changes will not cause a disparate impact on minority or low-income populations.
The proposed new Fare Ordinance is included as Attachment 1. The differences between the proposed new Fare Ordinance and the current Fare Ordinance are not tracked due to extensive modifications to the organization and terminology. Review of the tracked changes would have been more confusing and difficult than reviewing a clean version of the proposed new Fare Ordinance.

GARY L. GALLEGOS
Executive Director

Attachments: 1. Regional Comprehensive Fare Ordinance
              2. MTS letter dated 3/25/09

Key Staff Contact: Dan Levy, (619) 699-6942, dle@sandag.org
SAN DIEGO ASSOCIATION OF GOVERNMENTS
COMPREHENSIVE FARE ORDINANCE

An Ordinance Establishing a Regional
Fare Pricing Schedule & Revenue Allocation Formula

The San Diego Association of Governments (SANDAG) ordains as follows:

SECTION 1: FINDINGS

This Ordinance is adopted to implement a Comprehensive Fare Ordinance setting forth a fare structure for all public transit service providers in San Diego County.

SECTION 2: REGIONAL TRANSIT SERVICE DEFINITIONS

2.1 ACCESS: the complementary ADA service operated by MTS in Zone 1.

2.2 ADA: Americans with Disabilities Act, as defined in Title 49, Part 37, of the United States Code.

2.3 ADA Complementary Paratransit Service: Specialized curb-to-curb transportation services provided to persons who qualify as eligible for such services under the guidelines of the ADA.

2.4 BREEZE: NCTD fixed-route bus service brand name.

2.5 Bus: Rubber-tired transit vehicles operated by MTS and NCTD.

2.6 Bus Rapid Transit: A form of premium rapid transit service operated wholly or partly on exclusive bus lanes, guideways, or managed lanes.

2.7 Cash Fare: Term used to describe fares purchased with United States currency.

2.8 Child: Any person five years of age or under.

2.9 COASTER: The brand name of the commuter rail service operated by NCTD in the coastal corridor from Oceanside to San Diego.

2.10 College Student: Any person currently enrolled as a student in a participating accredited San Diego area post-secondary school with a valid picture identification issued by the school.

2.11 Companion: In relation to the ADA complementary paratransit service, a companion is someone who accompanies an ADA passenger on board a Paratransit vehicle, but is not a personal care attendant as specified in the passenger’s ADA certification application.

2.12 Compass Card: The Compass Card is an electronic fare medium based on contactless smart card technology. The Compass Card may hold either transit products or cash for use on
regional transit services. Transit products may include but are not limited to Monthly Passes, student semester passes, multi-Day Passes, and stored value.

The Compass Card utilizes wireless technology to interface with validator devices on buses, rail platforms and ticket vending machines (TVMS). Passengers must tap their Compass Card on a validator in order to utilize transportation services.

2.13 Day Pass: a fare medium that allows a passenger to ride one Service Day.

2.14 Discount: A reduction in the price of a fare or fare product as a result of the passenger holding a special identification card, or an existing fare product.

2.15 LIFT: The complementary ADA service operated by NCTD.

2.16 Limited Use Compass Card: A Compass Card printed on a disposable material. Limited Use Compass Cards have a limited lifetime and may not accept all fare products available for loading onto a plastic Compass Card.

2.17 Medicare Recipient: Any person to whom the Federal Government has issued a Medicare identification card, regardless of age.

2.18 MetroLink: The Commuter rail service operated by the Southern California Regional Rail Authority.

2.19 Monthly Pass: This term refers to either the Calendar Month Pass or the 30-Day Pass.

2.20 MTS: The Metropolitan Transit System which operates services in all areas of San Diego County outside the jurisdiction of NCTD. MTS operates MTS Bus, Rural Bus, MTS Express, MTS Premium Express MTS Trolley service and ADA Access Service.

2.21 MTS Suburban Paratransit: The complementary ADA service operated by MTS in suburban areas (ADA Zones 2, 3, and 4).

2.22 NCTD: North County Transit District operating services in Northern San Diego County. NCTD services include the BREEZE, COASTER, SPRINTER and LIFT.

2.23 OCTA: Orange County Transportation Authority.

2.24 Person with Disability: Any person with a permanent or temporary mental or physical disability as defined by the ADA. In order to qualify for a disabled fare a passenger for regular (non-ADA paratransit) transit must be in possession of a transit identification card or a valid Compass Card with a picture identifying the person as a person with a qualifying disability. In order to qualify for ADA Paratransit service the person with a disability must be ADA certified.

2.25 Personal Care Attendant: In relation to the ADA complementary paratransit service, a personal care attendant is a person who is designated by the ADA eligible passenger to aid in their mobility who is not charged a fare to ride on the ADA complementary paratransit vehicle when accompanying the ADA eligible passenger. The person may be a friend, family
member, or paid employee. The need for and use of a personal care attendant must be indicated at the time of eligibility certification.

2.26 **Platform Validator:** A validator located in a standalone device on a rail platform. Platform validators must be tapped before boarding a rail vehicle unless a new Compass Card product is loaded and validated at a TVM.

2.27 **Regional Fare System:** The Regional Fare System is governed by SANDAG Board Policy Nos. 018 and 029, this Ordinance, MTS and NCTD transit operations ordinances and policies, and any other fare agreements including agreements entered into by SANDAG with transit operators.

2.28 **Regular Fare:** Applies to all persons age six and older except persons eligible for S/D/M or Youth fares.

2.29 **S/D/M:** Acronym that stands for Senior, Disabled and Medicare passengers.

2.30 **Senior:** Any person who meets the age requirement for transit fares provided in the TransNet Ordinance Section 4, Paragraph (c)(3) is eligible to pay the discounted Senior Cash Fare or purchase a Senior pass.

2.31 **Service Day:** 4:00 a.m. until 3:59 a.m. on the subsequent day.

2.32 **Sorrento Valley COASTER Connection (SVCC):** A peak period only Community Shuttle service operated by MTS between the Sorrento Valley COASTER Station, and nearby employment centers.

2.33 **SPRINTER:** The brand name of the Oceanside to Escondido rail service operated by NCTD with Diesel Multiple Units (DMUs) in a light rail mode.

2.34 **Station:** A light rail, bus rapid transit or commuter rail passenger stop.

2.35 **Stored Value:** Cash value that can be debited to purchase fare products or pay a Cash Fare on a Compass Card.

2.36 **Supplement:** A charge paid on a one time basis to permit the use of a fare product for a transit ride that requires a more expensive fare. Payment of a supplement does not change the original fare product.

2.37 **Sworn Peace Officers:** San Diego County, state, and federal sworn peace officers.

2.38 **Tap:** The act of touching a Compass Card on a validator.

2.39 **Transit Service Types:**

2.39.1 **Local – Fixed-route bus service on local or arterial roads serving neighborhood destinations and feeding transit centers. Includes BREEZE and MTS Bus. Also includes routes operating extensively on arterials with transit priority features and limited stops (Rapid Services).
2.39.2 Corridor – A frequent transit service with limited stops including, but not limited to, major transit centers, residential centers and activity centers that has more than six stops outside Centre City. Corridor services include MTS Trolley and express buses generally traveling less than 50 percent of the one-way trip miles on freeways. Corridor services travel at least 12 miles per hour, with an average passenger trip length of approximately 10 miles or under.

2.39.3 Premium Express – Includes bus service with stops only at major transit centers, residential centers and activity centers; generally traveling 50 percent or more of the one-way trip miles on freeways; averaging at least 20 miles per hour, with an average passenger trip length of over 10 miles; and using commuter coaches. The future will include BRT operating at least 10 one-way route miles on a network of managed lanes or routes with transit priority measures.

2.39.4 Commuter Rail – The commuter rail service operated in the coastal corridor from Oceanside to San Diego by NCTD under the brand COASTER.

2.39.5 Rural – A rural bus service providing limited daily or weekly service linking rural areas to a multimodal transit center or major shopping center and designated by the MTS or NCTD Board of Directors as having a special one or two zone fare. Service is generally provided in rural areas with one-way vehicle trip lengths ranging from 15 to 80 miles.

2.40 Transfer: The action of a passenger leaving one bus, train, or other transit vehicle and within a brief time, without a stopover, boarding a subsequent bus, train, or other transit vehicle to complete his or her trip.

2.41 Transfer Slip: A document that may be issued by a driver to enable a passenger to board another transit vehicle free of charge or for a reduced amount. Transfer slips are not issued for travel entirely within San Diego County solely on the fixed-route system. Transfer slips may be issued for transfers between ADA services and fixed-route services and between fixed-route services and other systems outside San Diego County.

2.42 TransNet: The TransNet Ordinance is a SANDAG ordinance passed by voters in 2004 that provides for a ½ cent transactions and use tax collected in San Diego County and used for transportation-related projects.

2.43 Trolley: Light rail transit service operated by MTS.

2.44 TVM: Ticket Vending Machine used for the sale of single and multi-trip fare products.

2.45 Upgrade: An additional fare required to enhance the value of a transit pass to travel on a transit service with a higher fare. Upon payment of an upgrade the original fare instrument is converted to the new, more expensive product and the original product is no longer available.

2.46 Validator: A device for tapping a Compass Card in order to validate the fare product. Validators may be standalone devices, located on bus fareboxes, or part of a TVM. Validators located in TVMs may not be used as platform validators.
2.47 **Youth:** A person as defined in the TransNet Ordinance Section 4(C)(3).

2.48 **Zone:** For ADA purposes a zone is defined as:

- **Zone 1** Central San Diego
- **Zone 2** Mid-County: Poway, Rancho Bernardo, Rancho Peñasquitos, Carmel Mountain Ranch, and Sabre Springs
- **Zone 3** East County: La Mesa, El Cajon, Santee, Lakeside, Lemon Grove, Spring Valley, and parts of Alpine
- **Zone 4** South Bay: Chula Vista, Coronado, National City, Imperial Beach, Palm City, Nestor, Otay Mesa, and San Ysidro
- **Zone 5** NCTD Service area

For the COASTER, the fare zones are set forth in Table 3. The fares zones applicable to Rural Fares are set forth in Section 3.4 of this Ordinance.

**SECTION 3: SINGLE TRIP, SINGLE DAY & MULTI-DAY FARES**

3.1 **Fare Product Limitations**

3.1.1 SPRINT/BREEZE fare products may only be used on the SPRINT and BREEZE.

3.1.2 Regional fare products may not be used on COASTER, ADA, Premium Express and Rural bus services without paying an Upgrade or Supplement.

3.1.3 Premium fare products may be used on Local, Corridor, Premium, and single zone Rural services. Regional fare products may be used with the Supplements indicated in Table 1.

3.1.4 COASTER and Region Plus fare products may be used on all transit services operated by MTS and NCTD but require Supplements for two zone rural services. Discounts are available to holders of Premium and Regional fare products using the COASTER as shown in Table 1.

3.1.5 Sorrento Valley COASTER Connection fare products are only valid on the Sorrento Valley COASTER Connection.

3.2 **Fares and Pass Products**

Tables 1 and 2 list transit fares available to the general public. The tables show the fare for each type of service by passenger category, and which passes are accepted on specific services. The notes below the tables show the amount of any Supplement or Discount that may be required or available.
Table 1
Pass Prices, Acceptance and Required Supplements or Discounts

<table>
<thead>
<tr>
<th></th>
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<tbody>
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<td>Sorrento Valley</td>
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<td>$20.00</td>
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<td>No</td>
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<td>No</td>
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<td>n/a</td>
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<td>No</td>
<td>*1</td>
<td>No</td>
<td>No</td>
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<td>Yes</td>
<td>n/a</td>
<td>n/a</td>
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</tr>
<tr>
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<td>$18.00</td>
<td>$36.00</td>
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<td>Yes</td>
<td>Yes</td>
<td>*4</td>
<td>*1</td>
<td>*2</td>
<td>*3</td>
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<td>n/a</td>
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<td>$25.00</td>
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<td>Yes</td>
<td>Yes</td>
<td>*1</td>
<td>*2</td>
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<td>Yes</td>
<td>*2</td>
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<td>Yes</td>
<td>Yes</td>
<td>*2</td>
<td>No</td>
<td>*4</td>
<td>Yes</td>
<td>Yes</td>
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<tr>
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<td>Yes</td>
<td>Yes</td>
<td>*2</td>
<td>No</td>
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<tr>
<td>COASTER 3 Zone</td>
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<td>$45.50</td>
<td>$91.00</td>
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<td>Yes</td>
<td>Yes</td>
<td>*2</td>
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<tr>
<td>COASTER 4 Zone</td>
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<td>n/a</td>
<td>$45.50</td>
<td>$91.00</td>
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<td>Yes</td>
<td>*2</td>
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<td>Yes</td>
<td>Yes</td>
<td>n/a</td>
<td>n/a</td>
<td>Yes</td>
</tr>
</tbody>
</table>

1. Monthly only 2. Region Plus Pass Accepted

Table 2
Single Boarding Fares by Service, Acceptance, Required Supplements & Discounts

<table>
<thead>
<tr>
<th>Service</th>
<th>Single Boarding Fare</th>
<th>Passes Accepted</th>
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<tbody>
<tr>
<td></td>
<td>Regu lar</td>
<td>Senior Disabled &amp; Medicare</td>
</tr>
<tr>
<td>Sorrento Valley Coaster Connection</td>
<td>$1.00</td>
<td>$0.50</td>
</tr>
<tr>
<td>MTS Bus</td>
<td>$2.25</td>
<td>$1.10</td>
</tr>
<tr>
<td>MTS Trolley</td>
<td>$2.50</td>
<td>$1.25</td>
</tr>
<tr>
<td>MTS Express</td>
<td>$2.50</td>
<td>$1.25</td>
</tr>
<tr>
<td>MTS Premium</td>
<td>$5.00</td>
<td>$2.50</td>
</tr>
<tr>
<td>Rural Bus 1 Zones</td>
<td>$5.00</td>
<td>$2.50</td>
</tr>
<tr>
<td>Rural 2 Zones</td>
<td>$10.00</td>
<td>$5.00</td>
</tr>
<tr>
<td>BREEZE</td>
<td>$2.00</td>
<td>$1.00</td>
</tr>
<tr>
<td>SPRINTER</td>
<td>$2.00</td>
<td>$1.00</td>
</tr>
<tr>
<td>COASTER 1 Zone</td>
<td>$5.00</td>
<td>$2.50</td>
</tr>
<tr>
<td>COASTER 2 Zone</td>
<td>$5.50</td>
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<td>COASTER 3 Zone</td>
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<td>$3.00</td>
</tr>
<tr>
<td>COASTER 4 Zone</td>
<td>$6.50</td>
<td>$3.25</td>
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</table>

Special Notes For Tables 1 and 2.
Single Boarding Supplementary Fare or Discount from Single Trip Fares

*1 $2.00 Discount for Regular & Youth; $1.00 Discount for Senior/Disabled/Medicare.
*2 $4.00 Supplement for Regular & Youth; $2.00 Supplement for Senior/Disabled/Medicare.
*3 $8.00 Supplement for Regular & Youth; $4.00 Supplement for Senior/Disabled/Medicare.
*4 $2.00 Supplement for Regular & Youth; $1.00 Supplement for Senior/Disabled/Medicare
3.3 **COASTER Zones**

The COASTER Fares are based on four zones. The number of zones between stations is shown in Table 3. Passengers must purchase a single trip or return trip ticket or pass based on the number of zones between their origin and destination.

<table>
<thead>
<tr>
<th>To</th>
<th>Oceanside</th>
<th>Carlsbad Village</th>
<th>Carlsbad Poinsettia</th>
<th>Encinitas</th>
<th>Solana Beach</th>
<th>Sorrento Valley</th>
<th>Old Town</th>
<th>Santa Fe Depot</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oceanside</td>
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<td>2</td>
<td>2</td>
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<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Carlsbad Village</td>
<td>1</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>4</td>
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</tr>
<tr>
<td>Carlsbad Poinsettia</td>
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<td>2</td>
<td>1</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Encinitas</td>
<td>2</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>2</td>
<td>3</td>
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</tr>
<tr>
<td>Solana Beach</td>
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<td>1</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Sorrento Valley</td>
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<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Old Town</td>
<td>4</td>
<td>4</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>2</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Santa Fe Depot</td>
<td>4</td>
<td>4</td>
<td>3</td>
<td>3</td>
<td>2</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>

One-way tickets and passes are valid only for travel between the number of zones or the stations listed on the ticket or pass.

3.4 **Rural Bus Service Zones**

Zone 1 of the rural areas is west of the line that runs due south from a point 14 miles east of I-15 on the San Diego – Orange County line through the mid point of Palomar Mountain State Park and then to Ramona (Ramona Station), Alpine (Tavern Rd. and Alpine Blvd.), and Tecate border crossing (Tecate Road and Thing Road). Zone 2 of the rural area is east of this line.

3.5 **Senior/Disabled/Medicare**

The single trip Cash Fare for persons eligible for S/D/M fares shall be 50 percent of the single trip regular fare, rounded down to the nearest $0.05.

3.6 **Children**

NCTD and MTS may each determine how many children five years old and under may ride free on all bus, light rail and commuter rail services when traveling with a paying passenger.

3.7 **NCTD Reduced Fare Identification Card on BREEZE & SPRINTER**

Passengers holding a valid NCTD issued Paratransit Reduced Fare Identification Card may ride BREEZE, or SPRINTER services without payment of any fare. A personal care attendant may also ride free accompanying the passenger with a Reduced Fare Identification Card if the requirement for a personal care attendant is noted on the NCTD Paratransit Reduced Fare Identification Card.
3.8 **Regional Day Pass**

3.8.1 All Day Passes shall be valid for travel on the specified services from the time of issue for the number of consecutives days indicated on the Day Pass or Compass Card product. The Day Pass is valid for travel until the end of the Service Day. The prices for all 1-Day, 14-Day, Monthly, and 30-Day Passes are shown in Table 1.

3.8.2 Regional Day Passes will also be available for two, three and four days from the Transit Store, North County Customer Service Centers and select TVMs at the prices shown in Table 4.

<table>
<thead>
<tr>
<th>Day Pass</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>2 Day Regular</td>
<td>$9.00</td>
</tr>
<tr>
<td>3 Day Regular</td>
<td>$12.00</td>
</tr>
<tr>
<td>4 Day Regular</td>
<td>$15.00</td>
</tr>
</tbody>
</table>

3.8.3 The price of 14-Day Passes shall be 60 percent of the cost of Monthly Passes rounded to the nearest dollar.

3.9 **Region Plus Day Pass**

A Region Plus Day Pass is valid on all services except for LIFT, ACCESS and MTS Suburban Paratransit. Upgrade required for travel on Rural zone 2. The price of a Region Plus Day Pass is $14.00.

3.10 **Classroom Day Tripper**

Classroom Day Trippers are valid for travel between 9 a.m. and 3 p.m. and after 6 p.m., Monday to Friday and may be issued to school and youth groups (up to 18 years of age) on an advance sales basis only. Each group shall consist of a minimum of 15 people. One chaperone per every five students may ride at the Regional Classroom Day Tripper price.

<table>
<thead>
<tr>
<th>Valid on</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>MTS Bus, SPRINTER, BREEZE, Premium Express</td>
<td>$1.50</td>
</tr>
<tr>
<td>COASTER only</td>
<td>$3.00</td>
</tr>
<tr>
<td>COASTER plus any of the following: MTS Bus, MTS Trolley, Premium Express, SPRINTER, BREEZE</td>
<td>$4.50</td>
</tr>
</tbody>
</table>

A maximum of 135 students and adults per group are permitted to ride a single scheduled COASTER train. Advance confirmation of the availability of space is required at the time of purchase for all COASTER Classroom Day Trippers.

3.11 **SPRINTER/BREEZE Social Services Agency Day Pass**

The SPRINTER/BREEZE Social Service Agency Day Pass is a one-day NCTD Day Pass, sold in packs of ten priced at $45.00, which is validated by social service agencies by identifying the day, month, and year. It is sold only to qualified social service agencies who agree to dispense the Day Pass according to NCTD requirements. The Social Service Agency Day Pass
has a unique serial number code, and the customer may not return or exchange a Social Service Agency Day Pass. Valid for unlimited travel on SPRINTER/BREEZE for day punched.

### 3.12 Juror Day Pass

Any state or federal court in San Diego County may purchase Juror Passes after signing an agreement with SANDAG. Juror Passes are not valid for use on any special service with a higher fare (e.g. Stadium Bus Service) or ADA complementary paratransit service.

A Regional Juror Day Pass is valid for travel on all NCTD and MTS services except, Premium, COASTER or Rural services. A Region Plus Juror Day Pass is valid for travel on all NCTD and MTS services except 2-Zone Designated Rural services.

The price for Regional Juror Day Passes sold to the courts shall be based on the price of the Regional Day Pass and included in the agreement with the court. The price for Region Plus Juror Day Passes sold to the courts shall be based on the price of the Region Plus Day Pass and included in the agreement with the court.

### 3.13 Advance Purchase Group Day Pass Sales

Groups wishing to purchase a minimum of 100 Regional Day Passes shall be entitled to obtain passes at the rates shown in Table 5 when the passes are purchased at least 21 days in advance. Groups purchasing 1,000 or more Day Passes shall be entitled to discounts as shown in Table 6. Additional discounts require the approval of the SANDAG Transportation Committee or SANDAG Board of Directors.

#### Table 5

**Prices for Advance Purchase Group Day Passes**

<table>
<thead>
<tr>
<th>Days</th>
<th>Regional</th>
</tr>
</thead>
<tbody>
<tr>
<td>One Day</td>
<td>$4.50</td>
</tr>
<tr>
<td>Two Day</td>
<td>$8.00</td>
</tr>
<tr>
<td>Three Day</td>
<td>$11.00</td>
</tr>
<tr>
<td>Four Day</td>
<td>$14.00</td>
</tr>
<tr>
<td>Five Day</td>
<td>$16.00</td>
</tr>
<tr>
<td>Six Day</td>
<td>$18.00</td>
</tr>
<tr>
<td>Seven Day</td>
<td>$20.00</td>
</tr>
</tbody>
</table>

#### Table 6

**Additional Discount for Bulk Purchase of Advance Purchase Group Day Passes**

<table>
<thead>
<tr>
<th>Passes Purchased</th>
<th>Discount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1,000-1,999</td>
<td>5%</td>
</tr>
<tr>
<td>2,000-2,999</td>
<td>10%</td>
</tr>
<tr>
<td>3,000 - 3,999</td>
<td>15%</td>
</tr>
<tr>
<td>4,000 or more</td>
<td>20%</td>
</tr>
</tbody>
</table>
3.14 Monthly Passes

All Calendar Month Passes shall be valid until the end of the Service Day on the last day of the calendar month. All 30-Day Passes shall be valid for 30 consecutive days commencing on the first day the pass is validated.

3.15 Upgrades

Effective January 1, 2010, a Regional Day Pass residing on a Compass Card may be upgraded to a Region Plus Day Pass upon payment of the difference between the original price paid and the new pass price. This upgrade is only available on Compass Cards with a sufficient stored value balance and occurs automatically when a Compass Card with a valid Regional Day Pass is tapped prior to boarding a service requiring a Region Plus Day Pass. An upgrade does not extend the period of validity of the pass and is not available for paper Day Passes.

SECTION 4: MULTI RIDE TICKETS & TOKENS

4.1 Round Trip Tickets

Any transit operator may, at its option sell round trip tickets at two times the price of a single trip ticket for any fare category or service. Outbound and return trips must be taken on the same service day and are valid roundtrip from the point of origin to the destination.

4.2 Multi-Trip Ticket Packs

Any transit operator may, at their option, bundle multiple single trip tickets for any service they operate, and sell the tickets for the full face value of the tickets or with a discount of up to ten percent.

4.3 Tokens

If tokens are made available they shall be sold for $2.25 each, in multiples of 20 ($45.00) or 40 ($90.00), and shall entitle the person holding the universal token to up to a $2.25 cash fare value trip on any MTS bus or Trolley service except ADA paratransit services. Some services may require a cash upgrade in conjunction with the Regional Universal Token.

Tokens will not be accepted for payment of any COASTER, SPRINTER, Access, LIFT or Premium Express single trip fare. Multiple tokens may be used to pay fares or purchase passes with a value of more than one local bus trip, but change will not be given.

SECTION 5: STORED VALUE COMPASS CARDS

5.1 Card Acquisition and Registration

SANDAG, the administrator of the Compass Card Program, may require a nonrefundable fee for passengers wishing to acquire a Compass Card. The fee shall not exceed $5.00.

Compass Card users may elect to register their card. If registered, users will be entitled to one free replacement if the card is lost or stolen. Additionally, registered users of the Compass Card are entitled to balance protection. Registered users will be reimbursed the value of their cash or transit product at the time the card is reported lost or stolen.
Reimbursement will be provided on a new Compass Card. An unregistered user shall have no right to reimbursement or refund of a Compass Card balance even if the card is lost or stolen. Registered Compass Cards are not transferable.

Compass Card users may opt not to participate in the registration program, but shall be required to pay the above-mentioned fee and will not receive the benefits of registration. Whether or not a user pays a fee or participates in the registration program, the Compass Card shall be the property of SANDAG and may be revoked and/or confiscated by SANDAG, MTS, or NCTD.

5.2 Validating a Compass Card

Compass Card users who have a transit fare product or stored value loaded on their card must validate their card each time they board a bus or train. Passengers who fail to tap and validate their Compass Card as required may be deemed to not be in possession of a valid fare consistent with the ordinances and policies of MTS and NCTD.

5.3 Inspection and Use of Compass Cards

Users of the Compass Card must produce the Compass Card for inspection by authorized SANDAG, MTS, or NCTD personnel or their designated agents. The Compass Card is intended as a fare payment device on MTS, NCTD or any transportation service that is part of the San Diego Regional Fare System. Any nonauthorized use of the card is strictly forbidden.

5.4 Refunds of Stored Value and Transit Products

Refunds will not be issued for transit pass products loaded onto a Compass Card. Refunds of stored value remaining on voluntarily surrendered cards and confiscated cards will be available for registered Compass Cards only. Registered Compass Card holders seeking a refund must complete an application form available from the Transit Store or NCTD Customer Service, and follow the submission instructions on the application. Refunds will only be issued up to the maximum value of any receipts that show cash being loaded onto the subject Compass Card. All refunds are subject to a processing and waiting period of up to 90 days. SANDAG may refuse any improper request for refund, or may make a partial refund. SANDAG and the transit operators may deduct a processing fee of not more than ten percent on any refund. Refunds will be issued as a credit on the same card as the original purchase if made by credit card. Original payments made by cash, check or debit card will be refunded by check.

5.5 Photographs of Cardholders

A photograph of a registered card holder may be printed onto a Compass Card if requested by the registered user. NCTD, MTS and SANDAG may charge up to a $8.00 fee for placement of a photograph on the Compass Card. Compass Cards bearing a photograph may only be used by the person whose photograph appears on the card.

5.6 Stored Value

The stored value feature of a Compass Card may be loaded with cash value. A Compass Card with stored value may not be used to purchase an additional or replacement Compass Card.
A Compass Card with stored value may not be used to purchase fare products or stored value to be loaded onto a different Compass Card.

5.7 Default Fare for Stored Value

All card holders boarding any bus or rail vehicle and paying their fare with stored value on a Compass Card will have the applicable Day Pass cost deducted from the Compass Card when a farebox or platform validator is tapped. Passengers boarding a bus must advise the driver before tapping if they wish to pay a single trip fare or purchase a product other than the default Day Pass. Passengers boarding a service at any station or stop equipped with platform validators and TVMs must use the TVM if the passenger prefers to purchase a paper single trip ticket or a product other than the default Day Pass for the service they will be boarding.

SECTION 6: POST SECONDARY MONTHLY, QUARTER, AND SEMESTER PASS

6.1 Post Secondary Calendar Month & Semester Regional Passes

MTS and NCTD shall each have the exclusive right to sign agreements with educational institutions within their own district boundaries. MTS and NCTD may establish their own policies, terms or eligibility rules regarding the sale of the passes in the sales agreements, however the prices to the education institutions must conform to this Ordinance.

6.2 Discounted Calendar Monthly Post Secondary Regional Pass

The price of a Calendar Month Pass for post secondary institutions shall be 80 percent of the price of a Regional 30-Day Pass. The discounted pass shall be valid for unlimited travel during a calendar month period until the end of the Service Day on the 30th day. All Regional Pass discounts, supplements and upgrade rules apply to the Monthly Post Secondary Pass.

6.3 Discounted Post Secondary Regional Quarter/Semester Pass

The price of the quarter/semester pass for post secondary educational institutions shall be based on 65 percent of the price of a Local & Corridor Monthly Pass, divided by 31 and multiplied by the number of days in the quarter or semester. The period of validity of a Post Secondary Regional Quarter/Semester Pass shall not be less than 90 days.

The discounted pass shall be valid for unlimited travel during a semester until the end of the Service Day. All Regional Pass discounts, supplements and upgrade rules apply to the Post Secondary Regional Quarter/Semester Pass.

6.4 SPRINTER/BREEZE Only Post Secondary Pass

The SPRINTER/BREEZE Monthly Pass may be sold to post secondary educational institutions with a discount of $10.00 per month.

6.5 Ecopass Group Sales Pass Program

This program is for businesses or groups who purchase Regional and Premium passes and who are willing to purchase sufficient passes to provide a full year of transportation for 25 employees or members at a discounted rate and execute a participation agreement.
The pass price discount would be based on the pre-purchase of a specified number of passes for a 12-month period. Only one three-month trial program is permitted per employer or group interested in testing the program. Advance payment is required for both the trial program and permanent program annual passes. Participants may purchase additional monthly passes as provided in the participation agreement at a discounted rate.

The price of the employer or group sales pass program shall be set according to the number of annual regular adult passes purchased as defined in the participation agreement. All passes purchased in excess of limits in the participation agreement will be sold at retail rates.

SECTION 7: TRANSFERS WITH OTHER TRANSIT OPERATORS

7.1 MetroLink Trip Tickets and Monthly Passes

MetroLink Trip Tickets and Monthly Passes are valid as full boarding fare on NCTD buses and the SPRINTER on all routes directly serving the Oceanside Transit Center. MetroLink tickets and passes are not valid for transferring between NCTD routes or between NCTD and MTS. MetroLink tickets are not valid for transfers to the COASTER. The rules governing the acceptance of the MetroLink tickets and passes are as follows:

7.1.1 MetroLink Monthly Pass: This pass must have the correct current month, year, and list Oceanside as a valid city in order to be valid.

7.1.2 MetroLink Ten-Ride Ticket: This ticket has a validation printing area for each of ten (10) rides on METROLINK. In order to be valid to board an NCTD bus at Oceanside, the current date must appear in one of the boxes numbered 1 - 10.

7.1.3 MetroLink Round-Trip Ticket: This ticket must be imprinted with the current date and is valid until the time shown on that date on the BREEZE or the SPRINTER at Oceanside Transit Center.

7.1.4 MetroLink One-Way Ticket: This ticket must be imprinted with the current date and is valid until the time shown on that date, to board the BREEZE or the SPRINTER departing the Oceanside Transit Center.

7.2 NCTD and Orange County Transit Authority (OCTA) Transfers

The following transfer agreement is in effect with OCTA between its Route 1 and Route 191 and BREEZE Route 395:

7.2.1 BREEZE Route 395 to OCTA Route 1 or Route 191: The passenger will pay the appropriate NCTD single Cash Fare (or Day Pass fare) and be issued an interagency transfer onboard the 395. This transfer or Day Pass will be accepted by OCTA drivers as full fare for one boarding. In addition, NCTD BREEZE Passes and Regional Passes will be accepted by OCTA as full fare for one boarding on its system.

7.2.2 OCTA Route 1 or Route 191 to BREEZE Route 395: An OCTA passenger may transfer from an OCTA bus to NCTD Route 395 by displaying a valid OCTA Day Pass, or a valid OCTA Monthly Pass. No further fare supplement will be required. The
OCTA Day Pass or Monthly Pass is good for one boarding only on NCTD service. Therefore, the OCTA Day Pass or OCTA Monthly Pass is valid only on Route 395 in San Clemente, as this is the only route that connects with OCTA. Passengers continuing on other routes in Oceanside will need to pay a single Cash Fare or purchase an NCTD Day Pass.

7.3 Rail 2 Rail

Rail 2 Rail program is subject to annual renewal with the National Railroad Passenger Corporation (Amtrak). When an agreement is in effect persons holding valid Amtrak tickets may ride any COASTER train between Oceanside, Solana Beach and Santa Fe Depot within the origin and destination listed on their Amtrak ticket or pass. Passengers can determine if an agreement is in place by contacting NCTD.

SECTION 8: PARTICIPATION IN THE REGIONAL FARE SYSTEM

The requirements for participation in the Regional Fare System by transportation providers shall be as follows:

8.1 Transit operators participating in the Regional Fare System must operate fixed-route transit service with fixed, published schedules.

8.2 Transit Operators must serve an area not currently served by an existing publicly subsidized fixed-route bus operator.

8.3 New transit operators will be incorporated into the Compass Card system to the extent feasible and practical as determined by SANDAG.

8.4 Any transit provider selling or receiving SANDAG fare media shall have a secure handling procedure for all fare media. All tickets, passes and transfers shall be handled as cash-value media, with appropriate security provided for acceptance, inspection, storage, distribution, and disposal.

SECTION 9: SPECIAL FARES

9.1 Sworn Peace Officers

MTS and NCTD transit operators will allow all San Diego County, state, and federal sworn peace officers, in uniform or in civilian clothes, to ride on scheduled bus and train routes without charge. Officers must show identification when requested by MTS or NCTD. This privilege does not apply to special events for off-duty officers.

9.2 Temporary, Promotional, & Experimental Fares

MTS and NCTD shall have the ability to set temporary, promotional and experimental fares. Temporary, promotional and experimental fares are defined as fares implemented for no more than twelve months for seasonal events or for marketing purposes. These fares, because of their short term/temporary nature, are not included in this Ordinance.
SECTION 10: S/D/M & YOUTH COMPASS CARDS ELIGIBILITY & REQUIREMENTS

10.1 Eligibility

In order to be eligible to purchase discounted S/D/M Passes, passengers must present an S/D/M or person with disabilities Compass Card with integral photo identification or one of the valid identification cards listed in Sections 10.2 through 10.3.

10.2 Seniors

Seniors must provide a valid Medicare card, state-issued driver’s license, government-issued photo identification, or an S/D/M Compass Card with integral photo identification when paying a Cash Fare, purchasing a Senior Pass, or boarding a transit vehicle with a Senior Pass.

10.3 Persons with Disabilities & Medicare

10.3.1 Cash Fares

All persons with a valid MTS identification card, Medicare Card, NCTD disabled identification card, State of California Department of Motor Vehicles (DMV) disabled identification card, or DMV placard identification card shall be permitted to pay the S/D/M single cash fare.

10.3.2 Compass Cards

In order to receive a reduced fare Compass Card, a person with a disability must present for approval their completed application form and show a government issued photo identification card and original versions of at least one of the following (photocopies will not be accepted) at the time of submitting the application:

10.3.2.1 State of California Department of Motor Vehicles disabled identification card, (the white receipt from the DMV)
10.3.2.2 State of California Department of Motor Vehicles placard identification card
10.3.2.3 ADA Paratransit Identification Card
10.3.2.4 Certification on the application form by a Doctor or a qualified heath care professional or a statement from a physician or rehabilitation center (on original letterhead or prescription notepad with an original signature. In addition to the nature of the disability, the statement should identify whether it is permanent or temporary in nature
10.3.2.5 Individualized Education Program from school for disabled students
10.3.2.6 Current year Supplemental Security Income. (S.S.I.) or Social Security Administration (S.S.A.), or Social Security Disability Insurance (S.S.D.I.). award letter
10.3.2.7 Letter from the Epilepsy Foundation
10.3.2.8 Letter from the San Diego Center for the Blind
10.3.2.9 Letter from the San Diego Regional Center
10.3.2.10 Unexpired MTS or NCTD disabled identification card
10.4 Youth

Youth must provide on request valid school, college, or government-issued photo identification to establish eligibility for a Youth discount when boarding a transit vehicle with a Youth pass.

SECTION 11: ADA Paratransit

11.1 Fares

The Cash Fare for ADA Paratransit per ride for ADA Certified passengers for one complete trip, origin to destination regardless of any need to transfer between ADA transit operators or zones shall be double the local fixed-route fare of the typical fixed-route service linking the origin and destination based on a determination by MTS or NCTD. Such determination must be made by calculating the regular fixed-route fare including transfers for a trip of similar length, at a similar time of day, on the transit operators fixed-route system.

All ADA prepaid fare media will only be good on the system for which it was created. ADA prepaid fare media may not be loaded onto a Compass Card.

11.2 ADA Transfers

There is no charge to transfer from any ADA service to any Local, Corridor or Regional bus or rail service.

A transfer slip or proof of fare payment will be issued by the driver of an MTS ADA Paratransit service to allow ADA passengers to transfer to regular transit services. Passengers transferring from LIFT to SPRINTER or BREEZE will not require any transfer slip or proof of payment.

Passengers transferring from any fixed-route service must pay a Supplement if the fare paid on the fixed-route service is less than the fare on the ADA Paratransit service they are boarding. The Supplement required will be the applicable ADA Paratransit Fare less the amount of any fare paid on the fixed-route service. Passengers transferring from fixed-route to ADA will only receive a transfer credit if the fare paid on the fixed-route service is a fare for which a paper transfer or proof of payment is issued. This includes single and return trip rail tickets, or Regional or Region Plus day passes. If a single trip Cash Fare is deposited into a fixed-route farebox without a proof of payment the ADA passenger will be required to pay the full fare when boarding a subsequent ADA vehicle as receipts are not issued for single trip Cash Fares deposited into the farebox.

One personal care attendant may ride free with each ADA passenger riding an ADA Paratransit or transit vehicle if requirement is identified on ADA certification.

SECTION 12: REGIONAL TICKET AND PASS ADMINISTRATION

12.1 Policy Manual

SANDAG shall prepare and maintain a Policy and Procedures Manual that identifies the roles, responsibilities and procedures that will be used to manage the printing, sales, revenue allocation and revenue collection for all pre-paid transit fare media. The Policy and
Procedures Manual shall be reviewed and updated not less than once each year. The Manual shall cover the administration of printing, sales, boarding counts, revenue collection, and revenue allocation for fare products, including tickets, passes and tokens. The Manual does not apply to ADA transit operators.

12.2 SANDAG Responsibilities

SANDAG manages transit fares for the San Diego region. Pursuant to Board Policy No. 009 SANDAG complies with state and federal laws and regulations including the Americans with Disabilities Act of 1990 (ADA), Title VI of the Civil Rights Act of 1964 (Title VI) and other federal and state discrimination laws. SANDAG’s Third Party Complaint Procedures are available at www.sandag.org/legal and should be utilized in the event a person believes this Ordinance is being applied in a discriminatory manner. SANDAG is forbidden from operating transit services by state law. The transit operators are responsible for transit operations. Persons who believe they have been subjected to discrimination by a transit operator should contact the transit operator directly for assistance.

SANDAG shall:

12.2.1 Ensure that each transit operator submits monthly counts by category for all fare products subject to regional revenue distribution.

12.2.2 Distribute monthly the proportion of revenues from all regional fare media in accordance with Exhibit 1.

12.2.3 Prepare a yearly summary of passes, tokens, and ticket riders (by transit operator).

12.2.4 Fund and administer the design and printing of all regional passes, tokens, and tickets. The design of which shall be subject to approval by the transit operators.

12.2.5 Fund the regional prepaid fare program encompassing the distribution and sales reconciliation of all fare products subject to regional revenue distribution.

12.2.6 Prepare monthly summaries of TransNet local transportation sales tax subsidies for S/D/M and Youth Passes, or any other local jurisdiction subsidy by the end of the month.

12.2.7 Prepare monthly summaries of regional fare products that include all ticket revenue distribution, including subsidies, and shall submit a copy of these data, SANDAG summary counts, and allocation percentages to each transit operator.

12.2.8 Keep a separate fund for all pass and ticket sales revenue received.

12.2.9 Distribute monthly, within ten working days from the first of the month, to each transit operator its portion of regional fare products in accordance with Exhibit 1.

12.2.10 Bill local jurisdictions monthly for any subsidy payments that may result from a reduced price Monthly Pass program established by that jurisdiction and apportion such revenue to the appropriate transit operators.
12.3 Vendor Commissions

SANDAG may at its discretion enter into commercial agreements for the sale of transit fare products by third parties and such agreement may allow the vendor to earn a commission on the sale of products. The commission paid to any vendor may not exceed an aggregate of five percent of total product sales.

SECTION 13: TRANSIT OPERATOR RESPONSIBILITIES

13.1 Each transit operator shall determine pass riders by category and a daily record shall be maintained and kept on file for a one-year period. Such records shall be made available to SANDAG at its request.

13.2 Each transit operator shall prepare a monthly summary of pass riders by category and route, where applicable, using the formula in Exhibit 1.

13.3 Each transit operator shall permit SANDAG to be the decision maker in case of questions regarding pass counts, and SANDAG shall justify its decision to the transit operator(s) in writing.
SECTION 14: EFFECTIVE DATE OF ORDINANCE OR AMENDMENTS

This Ordinance shall go into effect on July 1, 2009. Notwithstanding Board Policy No. 004, all amendments shall go into effect not less than fifteen days after the second reading and approval of the Board of Directors unless approved in accordance with Board Policy No. 004 as an urgency measure.

PASSED AND ADOPTED this 24th of April 2009.

CHIEF EXECUTIVE OFFICER

______________________________          ______________________________
CHAIRPERSON                   SECRETARY

Member Agencies: Cities of Carlsbad, Chula Vista, Coronado, Del Mar, El Cajon, Encinitas, Escondido, Imperial Beach, La Mesa, Lemon Grove, National City, Oceanside, Poway, San Diego, San Marcos, Santee, Solana Beach, Vista, and County of San Diego.

ADVISORY MEMBERS: California Department of Transportation, Metropolitan Transit System, North County Transit District, Imperial County, U.S. Department of Defense, San Diego Unified Port District, San Diego County Water Authority, Southern California Tribal Chairmen’s Association, and Mexico.

STATE OF CALIFORNIA
COUNTY OF SAN DIEGO

I, Clerk of the Board of SANDAG, do hereby certify that the foregoing is a true copy of an Ordinance adopted by the SANDAG Board of Directors on April 24, 2009, at the time and by the vote stated above, which said Ordinance is on file in the office of SANDAG.

DATED: ___________________________, 2009

______________________________
Clerk of the Board
Exhibit 1

REVENUE SHARING AGREEMENTS
REGIONAL MONTHLY PASS
REVENUE ALLOCATION FORMULA

PROCEDURE DESCRIPTION

This formula shall be applied to all Regional Monthly Passes sold. The Premium Express passes are not part of the formula except that five percent of the total revenue from the Premium Express Passes is retained for the region and combined with the Regional Monthly Pass revenue. (The five percent rate represents the transfer rate on the Premium Express routes that accept the Premium Express passes. MTS keeps all the remaining Premium Express Pass revenue.) The base pass revenue is then allocated to each transit operator that accepts the Regional Monthly Pass based on the revenue the transit operator’s percentage of Regional Monthly Pass boardings for all adult passes.

PASS REVENUE ALLOCATION PROCEDURES

Step 1

1a. The total number of Regional Monthly Adult passes sold x current price + five percent of Premium Express Adult Monthly pass revenue = Monthly Pass base revenue.

1b. The total number of Regional Monthly Pass riders on all routes operated by transit operator “x” / the total number of Regional Monthly Pass riders on all routes operated by all transit operators = proportion of Regional Monthly Pass base revenue allocated to transit operator “x.”

1c. 1a x 1b = Current Price of Regional Monthly Pass base pass revenue allocated to transit operator “x.”

Step 2

2a. All Premium Express Monthly Pass revenue (minus the five percent included in the current Regional Monthly Pass base) is allocated to MTS.

Step 3

3. Any interest accrued by SANDAG as a result of the holding of Regional Monthly Pass revenues before allocation to the transit operators shall be paid to the operators.
REGULAR AND PREMIUM REGIONAL DAY PASS
REVENUE ALLOCATION FORMULA

PROCEDURE DESCRIPTION FOR REGIONAL DAY PASS

I. Applicability

This fare revenue allocation formula is applicable only to Regional Day Passes used by passengers that cross the boundary between the MTS and NCTD service areas. Regional Day Passes are passes that may be used on regular MTS and NCTD bus services (not Rural or Premium services), the SPRINTER and the Trolley. When conducting the revenue allocation formula calculations SANDAG shall treat multiple day Regional Day Passes in the same manner as a single day Regional Day Pass. Each transit operator shall retain 100 percent of revenue earned from the sale of day passes used exclusively on services within their own service area.

II. Regional Day Passes

1. At least once every year SANDAG shall conduct a survey of Regional Day Pass use on bus routes that cross the transit service area boundary between MTS and NCTD. The survey shall be conducted during the school year. Each transit operator shall retain 100 percent of the revenue earned from the sale of Regional Day Passes within their service area onboard buses and at ticket vending machines unless the following conditions occur as determined by the SANDAG survey:

   a. The number of Regional Day Passes purchased in the NCTD service area and used on MTS services exceeds by more than ten percent the number of Regional Day Passes sold in the MTS service area and used on NCTD services; or

   b. The number of Regional Day Passes purchased in the MTS service area and used on NCTD services exceeds by more than ten percent the number of Regional Day Passes sold in the NCTD service area and used on MTS services; and

   c. If the ten percent margin is exceeded and there is a difference of more than 25 passes per weekday between the number of passes sold on each system, the revenue from the number of passes in the imbalance shall be shared equally between the two transit operators. The number of day passes used annually shall be calculated by SANDAG based on the ratio of Regional Day Passes to other fares and applied to the annual ridership of the services that cross the boundary between the MTS and NCTD transit service areas. If the ten percent margin is exceeded and there is a difference of less than 25 passes, then no revenue sharing shall be required.

   d. Any interest accrued by SANDAG as a result of the holding of Regional Day Pass revenues before allocation to the transit operators shall be paid to the operators.
PROCEDURE DESCRIPTION FOR REGIONAL PREMIUM DAY PASS

The total number of Premium Day Passes issued by MTS and NCTD shall be collected and verified.

Each boarding on a MTS bus or NCTD bus with a Premium Day Pass shall be recorded and the total number of boardings shall be reported to SANDAG.

A monthly survey of Trolley riders and a quarterly survey of SPRINTER riders shall be conducted using the statistical procedures developed by SANDAG. From this survey the monthly or quarterly number of Premium Day Pass passengers shall be determined.

The NCTD percentage share of Day Pass revenue shall be calculated by dividing the number of NCTD Premium Day Pass boardings by the total (MTS + NCTD) number of boardings each reporting period. The MTS percentage share of Day Pass revenue shall be calculated by dividing the number of MTS Premium Day Pass boardings by the total (MTS + NCTD) number of boardings each reporting period.

The total revenue from the distribution of all Premium Day Passes shall be determined by adding the revenue received from one day Premium Day Passes. The revenue allocation for MTS shall be the total revenue times the percentage of Premium Day Pass Boardings on MTS. The revenue allocation for NCTD shall be the total revenue times the percentage of Premium Day Pass Boardings on NCTD.

Any interest accrued by SANDAG as a result of the holding of Premium Day Pass revenues before allocation to the transit operators shall be paid to the operators.
1. The total number of pass riders (by category) on all routes operated by transit operator “x,” divided by the total number of pass riders (by category) on all routes operated by all transit operators equals the proportion of pass revenue (by category) allocated to transit operator “x.”

2. Any interest accrued by SANDAG as a result of the holding of Senior/Disabled/Medicare and Youth Pass revenues before allocation to the transit operators shall be paid to the operators.
JUROR PASS REVENUE SHARING

Revenues from the sale of Juror Passes shall be shared as provided in the Memorandum of Understanding for the Juror Pass Program among the courts, the transit operators, SANDAG, and sponsors.

Any interest accrued by SANDAG as a result of the holding of Juror Pass revenues before allocation to the transit operators shall be paid to the operators.
TOKEN PROGRAM

TOKEN REVENUE ALLOCATION

1. The monthly token boardings for all participating transit operators will be calculated by the actual tokens sold.

2. All tokens received will be reported to SANDAG monthly.

3. All token sales revenue will be remitted to SANDAG.

4. Transit operators shall sort tokens from other currency and deliver them in a sealed envelope to SANDAG on a monthly basis for reimbursement. The envelope should be marked on the outside with the transit operator name and the number of tokens enclosed. SANDAG will reimburse the transit operator for each token submitted based on the calculated value of each token at the time of sale using a first in-first out methodology. SANDAG will reimburse transit operators following submittal of tokens in the monthly distribution report.

5. Any interest accrued by SANDAG as a result of the holding of Token revenues before allocation to the transit operators shall be paid to the operators.
COASTER REVENUE SHARING AGREEMENT

Five percent of net COASTER Revenue, including single tickets, round-trip tickets, and Monthly Passes shall be allocated by NCTD to MTS.

NCTD shall advise SANDAG of the total COASTER net revenue and pay 5 percent to SANDAG. Direct payments to participating agencies (i.e., Trolley for special event coordination) shall be deducted from the 5 percent net revenue submitted to SANDAG. Based on the data provided by NCTD, SANDAG shall forward the 5 percent share to MTS once each year in the year end distribution (June).

MTS shall have the responsibility for allocating the revenue to the transit operators within the MTS organization. SANDAG will direct the funds based on the MTS allocation. SANDAG will conduct a survey at least every three years of COASTER transfers patterns. MTS may elect to use the survey of transfer patterns to determine how the COASTER revenue is allocated among transit operators.

Any interest accrued by SANDAG as a result of the holding of COASTER revenues before allocation to the transit operators shall be paid to the operators.
March 25, 2009

Mr. Gary Gallegos  
Executive Director  
San Diego Association of Governments  
401 B Street, Suite 800  
San Diego, CA 92101

RE: SANDAG COMPREHENSIVE FARE POLICY

Dear Mr. Gallegos:

For several years, the Metropolitan Transit System (MTS) has been forced to address operating deficits caused by reduced sales tax revenues and State Transit Assistance funding. The state’s recent decision to completely eliminate its obligation to fund transit coupled with even lower sales tax revenues caused by the economic downturn have created a projected budget deficit of $11 million for FY 2010. This letter is to formally request that SANDAG initiate an amendment to the Regional Comprehensive Fare Ordinance to assist MTS in addressing its fiscal crisis.

The MTS Board of Directors adopted a strategy for deficit reduction at its March 12 meeting. The strategy includes a number of initiatives designed to increase revenues and reduce costs. Although some service adjustments were ultimately needed to bridge the budgetary gap, minimizing service impacts was a key objective. Careful analysis based on extensive research and modeling contributed to finding a fair approach to solving this recurring revenue shortfall, and various alternatives were analyzed and deliberated. The MTS Budget Development Committee, Executive Committee, and the full Board of Directors believe they have approved a balanced budget strategy that will spread the impact of our funding crisis over all aspects of our organization. No one community, service, or group of individuals will shoulder the entire burden.

The Board’s budgetary strategy includes $4.7 million in subsidy savings from service adjustments, a $4 increase in the adult monthly pass on July 1, 2009 (from $68 to $72), elimination of the Downtown Trolley fare, and an increase of one-way cash fares on Routes 851, 871/872, and 904 from $1 to $2.25. Commensurate increases would be made to the Youth and Senior/Disabled/Medicare Monthly Passes and/or cash fares. In order to accomplish the goal of a balanced FY 2010 budget, implementation of this strategy must occur by July 1, 2009. MTS is committed to working with SANDAG to ensure that all necessary public hearings and decisions can be made in keeping with this aggressive schedule.
The MTS Board was forced to take swift action to address the agency’s fiscal crisis. It is unfortunate that, at a time when our communities are turning to transit in record numbers, these difficult choices must be made. We look forward to SANDAG’s participation and assistance during these challenging times, and appreciate the region’s partnership in implementing the necessary fare adjustments.

Sincerely,

[Signature]

Paul Jablonski
Chief Executive Director

L-GGallegos.2010 FareIncrease.doc
gwilliams/temp/comprehensive fare policy
FUTURE CONGESTION MANAGEMENT PROGRAM PROCESS

Introduction

SANDAG is required by state law to prepare and regularly update a Congestion Management Program (CMP) for the San Diego region. The purposes of the CMP are to monitor the performance of the transportation system, develop programs to address near-term and long-term congestion, and better integrate transportation and land use planning. SANDAG adopted the 2008 CMP Update in November 2008.

SANDAG staff evaluated two strategies for future CMPs. One strategy is to streamline the state CMP process and the other is to opt out of the state CMP process. Under either option, SANDAG will continue to follow the federal congestion management process through ongoing planning activities.

SANDAG staff presented these initial options to the Transportation Committee at its meetings on September 19, 2008, and November 7, 2008. At the November 7, 2008, meeting, the Transportation Committee directed staff to discuss these options with the public works directors, planning directors, and traffic engineers of the County of San Diego, and the 18 cities who are represented at the Cities/County Transportation Advisory Committee (CTAC), the Regional Planning Technical Working Group (TWG), and the San Diego Traffic Engineers Council (SANTEC), respectively. SANDAG staff discussed these options with CTAC, TWG, and SANTEC at several meetings and most working group members were supportive of pursuing opting out of the state CMP process.

Discussion

2008 CMP Update Highlights

In order to meet state legislative requirements, the CMP provides: (1) ongoing monitoring of the region’s transportation system; (2) a program to evaluate and mitigate the traffic impacts of new development projects; (3) a number of congestion management strategies to mitigate congestion; and (4) a mechanism to prepare deficiency plans for roadway segments that do not meet the CMP Level of Service standard (LOS E).

The 2008 CMP Update was adopted in November 2008 and highlighted overall performance improvements for both CMP roadways and transit corridors and deficient CMP segments.
Deficient CMP Segment Analysis and Deficiency Plans

An analysis of CMP-identified roadway deficiencies (segments with LOS F) was conducted to assess the impacts of recommended improvements contained within the 2030 Regional Transportation Plan (RTP) on roadway congestion. Under state law, the local jurisdiction or jurisdictions in which the deficiency occurs are responsible for the preparation of Deficiency Plans. The initial Deficiency Plan requirements are met through the RTP deficiency analysis. For those remaining deficient roadway segments, SANDAG and Caltrans are available to assist local agencies in preparing individual Deficiency Plans. While a local jurisdiction may not currently have a CMP deficient roadway, any future deficiencies of such roadway will require preparation of a Deficiency Plan. Deficient roadway segments requiring Deficiency Plans identified in the 2008 CMP Update are listed in Attachment 1.

Options for Future Direction of the CMP

Staff evaluated two strategies for future CMP analysis to determine whether the state CMP process can be conducted in a more cost effective manner, and whether the efficiencies gained would outweigh the policy considerations. One strategy is to streamline the SANDAG CMP process and the other is to opt out of the state CMP process. A description of these strategies and some of the consequences of each are discussed below.

Streamlined CMP Approach

Staff evaluated incorporating the CMP requirements and monitoring into other SANDAG ongoing planning and monitoring activities, such as the Regional Comprehensive Plan (RCP) Annual Performance Monitoring Report and Intergovernmental Review Program. To continue to follow the state CMP requirements, the Office of General Counsel and staff believe it is not necessary to prepare a stand-alone CMP document in the future.

In order to implement the streamlined approach for the CMP monitoring and reporting process, the RCP Annual Monitoring Report would continue to include CMP deficiency analysis information, but it would be expanded to include the other information that is required to be reported for the CMP such as level of service data, identification of deficient segments, and a status report on Deficiency Plans. The current public review process for the RCP Annual Performance Monitoring Report could serve as the public review process for the CMP as well. This streamlined approach for state mandated CMP monitoring would be fully incorporated into the 2010 RCP Performance Monitoring report.

Benefits of the Streamlined CMP Approach

- Simplifies the CMP reporting process by combining efforts into other planning or monitoring programs.
- Ensures that monitoring of the region’s transportation system is conducted on a regular basis (biennially).
- Identifies Deficiency Plans that local jurisdictions must prepare for deficient segments.
Limitations of the Streamlined CMP Approach

- Mandates use of one measure (peak hour LOS) to determine roadway deficiencies.
- Requires that Deficiency Plans be prepared and adopted, but not implemented.
- Local jurisdictions requiring Deficiency Plans must prepare and adopt the Plans within 12 months of the recently adopted CMP or be found noncompliant and potentially risk withholding of funds.

If the region continues to follow the state CMP process, a status report on completed Deficiency Plans will be presented to Transportation Committee in fall 2009. Additionally, allocation of staff resources to conduct CMP deficiency analysis is included in the proposed FY 2010 Budget and Overall Work Program as part of the “Subregional Transportation and Land Use Planning” work element.

CMP Opt Out

Assembly Bill (AB) 2419, passed in 1996, allows congestion management agencies to “opt out” of the state CMP process. Section 65088.3 of the California Government Code states ‘this chapter does not apply in a county in which a majority of local governments, collectively comprised of the city councils and the county board of supervisors, which in total also represent a majority of the population in the county, each adopt resolutions electing to be exempt from the congestion management program.’ A number of counties throughout the state have opted out of the state CMP requirement, including all six counties in the Sacramento region, Fresno County, Santa Cruz County, and San Luis Obispo County.

One major reason to consider opting out of the state CMP process is to relieve local jurisdictions of the requirement to prepare Deficiency Plans for deficient segments. Additionally, as the Congestion Management Agency (CMA), SANDAG is required to report a local jurisdiction’s failure to prepare and adopt a sufficient Deficiency Plan within the time allowed by statute, and is obligated to request that the state withhold state gas tax funds from a local agency without an adopted Deficiency Plan.

Under the “opt out” option, SANDAG would still comply with federal congestion management provisions. Federal guidelines are not as prescriptive as the state CMP requirements. Federal CMP provisions are more flexible and utilize the RTP as the primary tool to provide solutions for congestion. The RTP includes identification and evaluation of anticipated performance and expected benefits of appropriate congestion management strategies (demand management, operational improvements, transit improvements, Intelligent Transportation Systems [ITS], etc.). If the region chooses to opt out, SANDAG will continue to meet the federal congestion management provisions through existing SANDAG planning and performance monitoring activities, such as the RTP and other multimodal performance monitoring efforts. Additionally, appropriate analysis of multimodal strategies and alternatives for corridors is required when an increase in single occupancy vehicle capacity is proposed.
The pros and cons of opting out of the state CMP requirement are outlined:

Pros of Opting Out

- Duplication in reporting of transportation system performance monitoring and reporting would be eliminated (roadways and transit).
- Local jurisdictions would not be required to prepare and adopt Deficiency Plans or be subject to loss of gas taxes if found noncompliant with state CMP requirements.
- There is no loss of state gas tax funding once the region has opted out of the state CMP.
- Resources allocated to prepare, implement, and enforce the CMP could be used on other planning activities.

Cons of Opting Out

- The process of “opting out” would require a one-time investment of staff time from SANDAG and local jurisdictions.
- Local jurisdictions with CMP-designated arterials would no longer be required to collect specific LOS for these segments although some jurisdictions would continue to collect these data on a regular basis.

Feedback Received on Future CMP Options

SANDAG staff discussed these options with local jurisdictions, which have representation at CTAC, TWG, and SANTEC at several meetings of these working groups over the last few months. Working group members were asked to discuss these options with city managers/county administrators and other key management staff. The majority of representatives from the working groups expressed support for pursuing the option of opting out.

In addition to meeting with working groups, SANDAG staff met with staffs from the City of San Diego, County of San Diego, and Caltrans to discuss future options for the CMP. Caltrans staff does not see any fundamental issues with the “opt out” option and existing Caltrans data collection methods would not be affected. Caltrans staff recommended that the thresholds for CEQA review for new development, specifically large projects, be maintained and incorporated into another SANDAG program or policy, such as the Intergovernmental Review Program or Fair Share Methodology Study. Additionally, the City of San Diego and County of San Diego staffs expressed their support for pursuing the “opt out” option.

SANDAG Office of General Counsel Legal Analysis

The SANDAG Office of General Counsel has confirmed that local agencies will not lose their gas tax allocations if the San Diego region opts out of the state CMP. The CMP process was established as part of the 1989 legislative package (known as the Transportation Blueprint) which, among other things, increased the fuel tax from nine cents to 18 cents, subject to voter approval (Proposition 111 in 1990). The process was intended to ensure that projects funded by new transportation revenues would reduce rather than exacerbate traffic congestion. The state CMP process requires local agencies to identify a specified transportation network and develop projects that are designed to reduce congestion. Failure to follow through on these plans was supposed to
subject a county to a potential loss of the enhanced fuel tax funding attributable to Proposition 111. As of 1996, however, no local agency had ever actually had its funds withheld due to lack of compliance with the state CMP.

In 1996, the California Legislature passed AB 2419 to allow urbanized areas the option to be exempt from preparation and implementation of the state CMP. According to the legislative history of AB 2419, the opt out provision was added because the state CMP requirements had in many instances become an expensive and redundant paper exercise, which had done little to reduce congestion and had never actually subjected a county to a fuel tax revenue penalty. Since persons opposed to AB 2419 claimed that in some counties the state CMP process was having positive effects, the bill was not written to completely remove the state CMP requirements. Instead it was written to give counties the option of exempting themselves on a self-determined basis.

**Next Steps**

If the Board of Directors approves the Transportation Committee recommendation to opt out of the state CMP process, staff will work with the local jurisdictions to process resolutions electing to be exempt from the CMP with the expectation that local jurisdictions should adopt such resolutions by September 2009. Each local jurisdiction will need to analyze the impacts of opting out on its specific programs and processes. If a majority of the local jurisdictions do not adopt resolutions in support of opting out of the state CMP process, staff will begin data collection efforts for the 2010 CMP update and will provide a status report on required Deficiency Plans to the Transportation Committee in fall 2009 under the streamlined CMP approach.

GARY L. GALLEGOS
Executive Director

Attachment: 1. 2008 CMP Roadway Segments Requiring Deficiency Plans

Key Staff Contact: Heather Werdick, (619) 699-6967, hwe@sandag.org

Funds are budgeted in Work Element #8000402
# 2008 CMP Roadway Segments Requiring Deficiency Plans

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<td>North Harbor Drive</td>
<td>Laurel Street to Hawthorne Street</td>
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Future Congestion Management Program Process

May 2009

Overview

- 2008 CMP Update highlights
- Options for future direction of the CMP
  - Streamlined CMP approach
  - CMP opt out
- Next steps
Purpose of CMP

• Ongoing monitoring of the region’s transportation system
• Strategies to mitigate congestion
• A program to evaluate and mitigate the traffic impacts of new development projects
• Mechanism to prepare Deficiency Plans for segments that do not meet the CMP LOS standard (LOS E)

2008 CMP Update

• Transportation Committee approved the Final 2008 CMP Update on November 7, 2008
• Twenty-one deficient segments require Deficiency Plans
• Local jurisdictions responsible for funding and preparing Deficiency Plans
Two Options for Future Direction of the CMP

1. Streamline CMP approach
   - RCP Monitoring Report
   - All other CMP requirements remain including Deficiency Plan requirements and enforcement

2. CMP Opt Out
   - Still comply with federal CMP provisions

Benefits of the Streamlined CMP Approach

- Simplifies the CMP reporting process by combining efforts into other programs
- Ensures that monitoring of the region’s transportation system is conducted on a regular basis (biennially)
- Identifies Deficiency Plans that local jurisdictions must prepare for deficient segments
Limitations of the Streamlined CMP Approach

- Mandates use of one measure (peak hour LOS)
- Requires that Deficiency Plans be prepared and adopted but not implemented
- Local jurisdictions requiring Deficiency Plans must prepare and adopt the Plans within 12 months of the recently adopted CMP or be found non-compliant and potentially risk withholding of gas tax funds

Trade-offs of Opting Out

- Pros
  - Duplication of transportation system performance monitoring and reporting eliminated
  - Local jurisdictions would not be required to prepare and adopt Deficiency Plans or be subject to loss of gas taxes if found non-compliant with state CMP requirements
  - Resources allocated to prepare, implement, and enforce the CMP could be used on other planning activities
Trade-offs of Opting Out

Cons
- The process of “opting out” would require a one-time investment of staff time from SANDAG and local jurisdictions
- Potential loss of arterial performance data used for regional transportation planning purposes

Feedback on Future CMP Options
- Future CMP options presented to CTAC, TWG, and SANTEC
- Working group members were encouraged to discuss with city managers/county administrators
- Additional consultation with City and County of San Diego and Caltrans staff
- General support for pursuing opting out
Next Steps

• Pending approval, staff will work with local jurisdictions to process resolutions electing to be exempt from the CMP

• If a majority of the local jurisdictions do not adopt resolutions to opt out, staff will begin data collection efforts for the 2010 CMP update and provide a status report on required Deficiency Plans

Recommendation

The Transportation Committee recommends that the Board of Directors direct staff to work with local jurisdictions to prepare resolutions electing to opt out of the state CMP
The San Diego County Water Authority, in response to reduced water supplies caused by regulatory restrictions on water deliveries from Northern California, lingering drought, and cutbacks from the San Diego region’s main water supplier, is reducing water deliveries to local water agencies by 8 percent, starting July 1.

To help achieve this water-savings target, the Water Authority has declared a Level 2 “Drought Alert” condition. This action enables the Water Authority’s 24 member retail agencies to adopt mandatory conservation measures for residents and businesses, such as use restrictions or tiered water rates that charge more for excessive water use. Shortage levels and restrictions may vary by retail agency. It’s critical for residents and businesses to check with their local water provider to make sure they understand the rates and restrictions in their community, and to immediately increase conservation efforts.

Many water agencies around the state are grappling with supply shortages. Three straight years of drought conditions, diminished water storage levels, and regulatory restrictions on water deliveries from Northern California have combined to severely limit water supplies around much of California. The regulatory restrictions are expected to affect water supply reliability in the years ahead.

These challenges prompted the Metropolitan Water District of Southern California, which provides about 71 percent of the San Diego region’s water supply, to allocate, or cut back deliveries to the San Diego County Water Authority and MWD’s other member agencies effective July 1. Water Authority officials estimate the allocation will reduce MWD’s water deliveries to the San Diego region by 13 percent.

To help prepare the San Diego region for water shortages, the Water Authority created a Model Drought Response Ordinance. It has four levels, each with recommended water-use restrictions designed to achieve demand reduction during water shortages.

More information on the Water Authority’s Model Drought Response Ordinance, along with links to drought response ordinances for each retail water agency, is available at www.sdcwa.org. Water-saving tips and other conservation-related resources for residents and businesses are available at 20gallonschallenge.com.

Most residential water use occurs outdoors. Fix leaks and reduce overspray immediately to save water.
**Enhancing Water Supply Reliability**

**Drought Management**

The Water Authority has implemented plans and strategies for managing the region’s water resources effectively during times of limited supply.

In 2006, the Water Authority became the first Southern California water agency to adopt a Drought Management Plan that includes a shortage allocation plan. Developed in cooperation with the Water Authority’s 24 member agencies, it lays out orderly, progressive actions to be taken as supply challenges escalate. (To view the plan visit www.sdcwa.org/manage/pdf/DroughtManagementPlanFinal.pdf.)

Following the plan, the Water Authority has heavily promoted voluntary water conservation. In 2008, cumulative savings from long-term conservation rebate and other programs helped save more than 53,000 acre-feet of water. Outreach and advertising campaigns urging extraordinary conservation succeeded in saving another 31,000 acre-feet.

The Water Authority also is securing short-term, or “dry-year” transfers to augment existing supplies.

In 2008, the Water Authority secured 23,000 acre-feet of dry-year transfers, as well as storage agreements with facilities in the Central Valley for holding the water until it’s needed. The Water Authority’s goal is to secure 50,000 acre-feet of dry-year transfers in 2009.

The Water Authority is now in the mandatory cutbacks stage of the Drought Management Plan. This stage determines mandatory shortage allocations for each member agency.

**Supply Diversification**

The Water Authority is executing a long-term strategy to enhance the reliability of our region’s water supply through improved infrastructure and diversifying the region’s water supply portfolio.

In 1991, the San Diego region was 95 percent reliant on supplies from the Metropolitan Water District. Through developing new local and imported supplies and boosting conservation, by fiscal year 2008 the San Diego region reduced its reliance on MWD supplies to 71 percent, improving regional reliability.

The Water Authority is executing a $3.7 billion Capital Improvement Program to further improve regional water delivery and storage capacity. Major projects include raising San Vicente Dam in East County by 117 feet to provide up to 152,100 acre-feet of additional storage, and connecting Lake Hodges to the region’s water distribution system.

The Water Authority continues to work with local agencies to develop local supplies such as groundwater, recycled water, seawater desalination, and conservation. By 2020, these supply sources are projected to meet 40 percent of the region’s water demands.

The Water Authority also has a long-term (45 to 75 years) water conservation and transfer agreement with the Imperial Irrigation District. The deal, reached in 2003, will provide San Diego County with 60,000 acre-feet of reliable water in 2009 and will gradually increase to 200,000 acre-feet annually by 2021.

The Water Authority also has separate 110-year agreements to receive water conserved by lining parts of the Coachella and All-American canals. When both are complete, these projects will provide more than 80,000 acre-feet of water to the region annually.
Retail Water Providers

- Individual customers served by local retail water agency
- Local agencies supplied by wholesaler (Water Authority)
- Water Authority secures supplies from outside the region for 24 local agencies
  - 6 cities
  - 14 water/utility districts
  - 3 irrigation districts
  - 1 military base

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<td>Camp Pendleton</td>
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<td>Fallbrook PUD</td>
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<td>Helix WD</td>
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* Member of the Sweetwater Authority
San Diego County’s Water Sources (2008)

San Diego County imports more than 80% of its water supply

State Water Project (Bay-Delta) 28%
Colorado River 54%
Local Water Supply Projects 18%

Three Challenges to Our Water Supply

1. Regulatory
   - Pumping restrictions are sharply limiting imported water from Northern California

2. Drought
   - Last three years in California
   - 8 of last 10 on the Colorado River

3. Low storage
   - Major reservoirs have been drawn down to low levels
Pumping restrictions have severely cut water supplies from Northern California.

Operations of the Harvey O. Banks Pumping Plant (State Water Project) have been reduced to protect threatened and endangered species.
Impacts of Regulatory Restrictions on Southern California’s Supplies

Reductions in water supplies from the State Water Project due to Delta smelt pumping restrictions

<table>
<thead>
<tr>
<th>Year</th>
<th>AF</th>
<th>24% lost</th>
<th>40% lost</th>
<th>44% lost</th>
<th>43% lost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Drier Years</td>
<td>315,000 AF</td>
<td>74,700 AF</td>
<td>15,200 AF</td>
<td>44%</td>
<td>43%</td>
</tr>
<tr>
<td>Wetter Years</td>
<td>585,000 AF</td>
<td>234,400 AF</td>
<td>238,800 AF</td>
<td>44%</td>
<td>43%</td>
</tr>
<tr>
<td></td>
<td>960,000 AF</td>
<td>414,400 AF</td>
<td>422,400 AF</td>
<td>44%</td>
<td>43%</td>
</tr>
<tr>
<td></td>
<td>1,060,000 AF</td>
<td>414,400 AF</td>
<td>422,400 AF</td>
<td>44%</td>
<td>43%</td>
</tr>
</tbody>
</table>

AF = Acre-feet. One acre-foot = 325,900 gallons.

Impacts to San Diego County

- Metropolitan Water District (MWD) to allocate supplies
  - 13% reduction from MWD
- Water Authority allocating supplies to its 24 member retail agencies
  - Diversification reduces shortfall to urban water customers to 8%
  - Cutbacks to agriculture: 13% to 30%
- “Drought Alert” condition
  - Mandatory water use restrictions

Drought Watch (10% voluntary conservation)
Drought Alert (Up to 20% mandatory conservation)
Drought Critical (Up to 40% mandatory conservation)
Drought Emergency (More than 40% mandatory conservation)
### Estimated FY 2010 Regional Shortage

#### Estimated FY 2010 Municipal and Industrial

<table>
<thead>
<tr>
<th>Description</th>
<th>Acre-Feet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Municipal &amp; Industrial (M&amp;I) Demands</td>
<td>629,000</td>
</tr>
<tr>
<td>Core Supplies</td>
<td></td>
</tr>
<tr>
<td>Estimated M&amp;I Allocation from MWD</td>
<td>380,000</td>
</tr>
<tr>
<td>Colorado River Quantification Settlement Agreement (QSA) Supplies</td>
<td>155,000</td>
</tr>
<tr>
<td>Local Potable Supplies</td>
<td>30,000</td>
</tr>
<tr>
<td>Total Core Supplies</td>
<td>305,000</td>
</tr>
<tr>
<td>Estimated Regional Shortfall</td>
<td>64,000 (10%)</td>
</tr>
</tbody>
</table>

#### Dry-Year Supply Utilization

<table>
<thead>
<tr>
<th>Description</th>
<th>Acre-Feet</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009 Transfer Supplies (32,000 AF available)</td>
<td>16,000</td>
</tr>
<tr>
<td>Carry-over Storage Supplies (42,000 AF available)</td>
<td>0</td>
</tr>
<tr>
<td>Total Supplies</td>
<td>581,000</td>
</tr>
<tr>
<td>Estimated Regional M&amp;I Shortage</td>
<td>48,000 (8%)</td>
</tr>
</tbody>
</table>

### Mandatory Water Use Restrictions

- Irrigation restrictions
  - Limits on number of days/duration/prohibited hours
  - Stop runoff/time limits to repair leaks
- Washing paved surfaces prohibited
- Car washing: positive shut-off nozzle or commercial site that re-circulates/re-uses water
- Restaurants: water served only upon request
- For specifics on local regulations: [www.sdcwa.org](http://www.sdcwa.org)
Public Opinion Poll Results

- 95% of respondents were aware of supply issues
- Residents are willing to address the supply issue “head-on” through
  - Mandatory cutbacks (2:1 in favor)
  - High rate of support for desalination
  - Funding a bond measure to finance new water supply projects
  - Pay more on their bill
- Support for water recycling, including potable reuse
- Conservation is a civic responsibility

The Impact on Rates

<table>
<thead>
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<th>$</th>
<th>$$</th>
<th>$$$</th>
<th>$$$$</th>
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</thead>
<tbody>
<tr>
<td>Colorado River</td>
<td>&lt;2003</td>
<td>2003-2007</td>
<td>2008&gt;</td>
<td>2009-10?</td>
</tr>
<tr>
<td>Water Project</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spot Water</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transfers</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Loss of Sales</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(Shortage)</td>
<td></td>
<td></td>
<td></td>
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</tbody>
</table>

- Supply challenges make securing water more expensive
- Shift to more-expensive supplies is driving up the cost of water from MWD, the Water Authority’s largest supplier
- Water Authority passes increased costs to member agencies
- Member (retail) agencies pass costs to ratepayers
Rates and Charges

- MWD increase (9/1/2009)
  - 19.7% average increase in rates & charges
  - 21.1% increase in cost of full service, treated water
- Water Authority increase (9/1/2009)
  - Public hearing to be set on May 28
  - Increase will be similar to MWD
  - Impact on typical user—approximately $6.25/month

Summary

- Water supply challenges likely to continue for years
  - Fixing the Bay-Delta is essential to restoring reliability
- Water Authority moderating near-term shortages with dry-year transfers and storage
- Long-term supply diversification reduces risk of shortages
- Permanent water conservation ethic essential
What can YOU do?

- Support water supply reliability efforts
  - Push state leaders to fix Bay-Delta
  - Continue to support expansion of local supply projects
    - Desalination, recycling, groundwater
  - Support continued investment in regional water infrastructure
- Businesses/residents must save more water now
  - Make immediate changes to reduce water use
  - Visit www.sdcwa.org to view local agency restrictions
  - Adopt permanent ethic of conservation/efficiency

Questions?

San Diego County Water Authority
Speakers Bureau Requests and Information
speakersbureau@sdcwa.org
(858) 522-6708
Water Authority Background

- Wholesale water agency created by State Legislature in 1944
  - 35-member board of directors
  - Serves 3 million people and region’s $171 billion economy

- Service area
  - 920,000 acres
  - 97% of county’s population
Water Supply Reliability

Reliable Water

Annual Rain/Snow
Water Storage
Pumping Capacity