BOARD OF DIRECTORS
AGENDA

Friday, December 9, 2011
9 a.m. to 12 noon
SANDAG Board Room
401 B Street, 7th Floor
San Diego

AGENDA HIGHLIGHTS

• FIRST READING OF PROPOSED AMENDMENTS TO COMPREHENSIVE FARE ORDINANCE AND TITLE VI FINDINGS RELATING TO AMENDMENTS

• QUALITY OF LIFE FUNDING STRATEGY: PUBLIC INFORMATION SURVEY RESULTS AND NEXT STEPS

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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.
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. Members of the public may address the Board on any issue under the agenda item entitled Public Comments/Communications/Member Comments. Public speakers are limited to three minutes or less per person. 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. Public comments regarding the agenda can be forwarded to SANDAG via the e-mail comment form 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. Any handouts, presentations, or other materials from the public intended for distribution at the Board of Directors meeting should be received by the Clerk of the Board no later than 12 noon, two working days prior to the meeting.

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请在会议前至少72小时打电话(619) 699-1900提出请求。

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<th>ITEM #</th>
<th>RECOMMENDATION</th>
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<tr>
<td>1.</td>
<td>PUBLIC COMMENTS/COMMUNICATIONS/MEMBER COMMENTS</td>
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<tr>
<td></td>
<td>Public comments under this agenda item will be limited to five public speakers. 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. Other public comments will be heard during the items under the heading “Reports.” 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. Public speakers are limited to three minutes or less per person. Board members also may provide information and announcements under this agenda item.</td>
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<td>CONSENT (2 through 3)</td>
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<tr>
<td>+2.</td>
<td>JOB ORDER CONTRACT FOR STATE ROUTE 905 ENVIRONMENTAL MITIGATION (Richard Chavez and Pye Salazar)</td>
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<td></td>
<td>Caltrans wishes to utilize the SANDAG Job Order Contract (JOC) to restore the Handler Mitigation Site as an environmental mitigation measure for the ongoing State Route 905 construction in Otay Mesa. The additional workload can be accommodated by a SANDAG JOC, and will be completely reimbursed by Caltrans. The Board of Directors is asked to approve an amendment to the FY 2012 Budget and authorize the Executive Director to sign a Project Implementation Order with Caltrans in substantially the same form as Attachment 1, to allow Caltrans use of a SANDAG Job Order Contract for the purpose of restoring the Handler Mitigation Site.</td>
</tr>
<tr>
<td>+3.</td>
<td>EXTENSION REQUESTS FOR FY 2011 TRANSPORTATION DEVELOPMENT ACT AUDITS (Lisa Kondrat-Dauphin)</td>
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<td>The Board of Directors is asked to approve Transportation Development Act audit extension requests for the Cities of National City, San Diego, and San Marcos, and SANDAG, until March 26, 2012, as permitted by the Public Utilities Code and the California Code of Regulations.</td>
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<td>REPORTS (4 through 9)</td>
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<td>+4.</td>
<td>FIRST READING OF PROPOSED AMENDMENTS TO COMPREHENSIVE FARE ORDINANCE AND TITLE VI FINDINGS RELATING TO AMENDMENTS (First Vice Chair Jack Dale, Transportation Committee Chair; Brian Lane)</td>
</tr>
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<td></td>
<td>The Board of Directors is asked to: (1) hold the first reading of the proposed amendments to the Regional Comprehensive Fare Ordinance; (2) find that the proposed fare changes will not cause a disparate impact under the Title VI of the federal Civil Rights Act; and (3) approve Resolution No. 2012-12, which makes a finding that the proposed changes qualify for an exemption under the California Environmental Quality Act.</td>
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</table>
+5. AMENDMENT TO THE SOUTHERN CALIFORNIA HIGH-SPEED RAIL
INLAND CORRIDOR GROUP MEMORANDUM OF UNDERSTANDING
AND COMMENTS ON THE CALIFORNIA HIGH-SPEED RAIL
PROGRAM DRAFT 2012 BUSINESS PLAN (Linda Culp)

SANDAG is a member of the Southern California High-Speed Rail Inland
Corridor Group, a group of regional agencies and the California High-Speed
Rail Authority (CHSRA) working cooperatively on technical studies for the
Los Angeles to San Diego via Inland Empire High-Speed Train section. In
2009, these agencies signed a Memorandum of Understanding (MOU) for
this work, which expires December 31, 2011. The Board of Directors is asked
to: (1) approve the amended interagency MOU in substantially the same
form as Attachment 2; (2) provide comments on the draft business plan; and
(3) authorize the Executive Director to issue a letter to the CHSRA containing
the Board’s comments as well as those staff comments reflected in
Attachment 3 regarding the draft business plan.

+6. COMPASS CARD AND ALBERTSONS PARTNERSHIP
(James Dreisbach-Towle and Colleen Windsor)

Staff will provide a report on a proposed partnership with Albertsons, a
division of Supervalu, Inc. that would have Albertsons as the exclusive
grocery store third-party outlet for Compass Card sales and reloads, and
would provide affinity marketing between Metropolitan Transit System,
North County Transit District, and SANDAG with Albertsons. Staff will report
on the expected transition timeline and public outreach efforts. The Board of
Directors is asked to approve an amendment to the FY 2012 Budget to
increase the Compass Card work element budget by $95,977 to $1,925,416
to fund transition costs for the Albertsons partnership.

+7. QUALITY OF LIFE FUNDING STRATEGY: PUBLIC INFORMATION
SURVEY RESULTS AND NEXT STEPS (Councilmember Todd Gloria;
Rob Rundle)*

The Quality of Life Steering Committee and the Quality of Life Stakeholders
Working Group have been meeting regularly to prepare input for the Board
of Directors on the development of a Quality of Life funding strategy. The
Quality of Life Steering Committee recommends that the Board of Directors
direct staff to return with a proposed amendment to the TransNet Extension
Ordinance to extend the deadline for acting on an additional funding
measure to no later than 2016 as well as related revisions to the Quality of
Life Stakeholder Working Group charter as may be needed.

+8. CLOSED SESSION - CONFERENCE WITH LEGAL COUNSEL – EXISTING
LITIGATION – PURSUANT TO GOVERNMENT CODE SECTION
54956.9(A) – CLEVELAND NATIONAL FOREST FOUNDATION ET AL.
V. SANDAG (CASE NO. 37-2011-00101593-CU-TT-CTL), AND CREED-
21 ET AL. V. SANDAG (CASE NO. 37-2011-00101660-CU-TT-CTL)*
9. REQUEST FOR USE OF CONTINGENCY RESERVES TO FUND DEFENSE TO LITIGATION REGARDING THE ENVIRONMENTAL IMPACT REPORT FOR THE 2050 REGIONAL TRANSPORTATION PLAN (Julie Wiley)*  

Based on the discussion of the previous item, which concerns litigation filed against SANDAG concerning the Environmental Impact Report for the 2050 Regional Transportation Plan, staff is requesting authorization to utilize contingency reserves to fund the SANDAG defense.

10. CONTINUED PUBLIC COMMENTS

If the five speaker limit for public comments was exceeded at the beginning of this agenda, other public comments will be taken at this time. Subjects of previous agenda items may not again be addressed under public comment.

11. UPCOMING MEETINGS

The next Board Business meeting is scheduled for Friday, December 16, 2011, at 9 a.m. Please note that the Board meeting will be held on the third Friday of the month due to the holiday schedule.

12. ADJOURNMENT

+ next to an agenda item indicates an attachment  
* next to an agenda item indicates a San Diego County Regional Transportation Commission item
JOB ORDER CONTRACT FOR STATE ROUTE 905
ENVIRONMENTAL MITIGATION
File Number 1390503

Introduction

A Job Order Contract (JOC) is a competitively bid, indefinite quantity contract that is based upon specific unit pricing contained in a unit price catalog setting forth detailed repair and construction items of work, including descriptions, specifications, units of measurement, and individual unit prices for each item of work. As work within the scope of a JOC is identified, a job order is issued using the labor and supply rates set forth in the JOC. Board Policy No. 024: Procurement and Contracting - Construction authorizes SANDAG to utilize the JOC process for the performance of minor routine or recurring construction, or for the renovation, alteration, or repair of existing public facilities.

SANDAG has entered into a number of JOCs with differing areas of emphasis. Each of the JOCs provides for the participation of other public agencies in the JOC as allowed by SANDAG. Caltrans wishes to utilize the SANDAG JOC to restore the Handler Mitigation Site as an environmental mitigation measure for the State Route 905 (SR 905) construction project in Otay Mesa. This work was not anticipated as part of the original SANDAG FY 2012 Budget.

Discussion

SR 905 construction between Interstate 805 and SR 125 has been ongoing since 2008. This work is scheduled to be complete in summer 2012. An environmental mitigation measure for the project includes the restoration of the Handler Mitigation Site (Attachment 2). This 2.6 acre parcel will provide compensation for the loss of wetland and upland habitat associated with SR 905 construction. SR 905 is part of the 2050 Regional Transportation Plan and is considered an important transportation facility for maintaining regional mobility and border access for the international movement of goods and services.

Originally, the restoration of the Handler Mitigation site was planned as part of SR 905 construction project. Due to complications with SR 905 construction, it will be more efficient to complete this work by the SANDAG JOC. Caltrans does not have its own JOC capacity and would like to contract with SANDAG to provide this service. The work needs to be completed by March 2012 in order to accommodate the upcoming nesting season and to maintain consistency with the federal migratory bird act.

Recommendation

The Board of Directors is asked to approve an amendment to the FY 2012 Budget and authorize the Executive Director to sign a Project Implementation Order with Caltrans in substantially the same form as Attachment 1, to allow Caltrans use of the SANDAG Job Order Contract for the purpose of restoring the Handler Mitigation Site.
This work was not planned for in the original SANDAG FY 2012 Budget. The estimated value of the JOC is not expected to exceed $945,000. The work is appropriate for a JOC contract. Caltrans will pay SANDAG in advance for all JOC and staff related expenses. A new Capital Improvement Program (CIP) worksheet will be created for this project with funds budgeted in Work Element 1390503. The terms of the agreement are documented in the attached Project Implementation Order to the Master Agreement between SANDAG and Caltrans (Attachment 1).

GARY L. GALLEGOS
Executive Director

Attachments: 1. Project Implementation Order
             2. Location Map

Key Staff Contacts: Richard Chavez, (619) 699-6989, rch@sandag.org
                   Ismael “Pye” Salazar, (619) 688-6766, Ismael.Salazar@dot.ca.gov
PROJECT IMPLEMENTATION ORDER NO. 22 REGARDING SR 905 HANDLER MITIGATION SITE
ISSUED UNDER SANDAG CONTRACT NO. 5001444 - MASTER AGREEMENT REGARDING COLLABORATIVE PROJECTS IN SAN DIEGO COUNTY BETWEEN SANDAG AND CALTRANS

The following recitals are a substantive part of this Project Implementation Order (PIO):

WHEREAS, SANDAG and CALTRANS entered into a MASTER AGREEMENT, Contract No. 5001444, on April 1, 2010, regarding collaborative projects in the San Diego region; and

WHEREAS, the MASTER AGREEMENT allows for the transfer of funding between SANDAG and CALTRANS and defines the working relationship between SANDAG and CALTRANS; and

WHEREAS, the MASTER AGREEMENT allows the PARTIES to enter into a PIO to document transactions at the TRANSPORTATION IMPROVEMENT or project level as contemplated and defined in the MASTER AGREEMENT, in situations where a separate COOPERATIVE AGREEMENT or amendment to the MASTER AGREEMENT is not required; and

WHEREAS, CALTRANS desires to restore property known as the Handler property, referred to herein as (PROJECT); and

WHEREAS, CALTRANS must complete the PROJECT to meet environmental mitigation requirements for State Route 905 (SR 905) construction and wishes to utilize the SANDAG Job Order Contract (JOC) for this restoration work; and

WHEREAS, SR 905 is included in the SANDAG 2050 Regional Transportation Plan and is considered an important transportation facility for maintaining regional mobility and border access for the international movement of goods and services; and

WHEREAS, SANDAG has the ability to complete the PROJECT utilizing one of the Job Order Contracts to which it is a party.

NOW THEREFORE, SANDAG and CALTRANS enter into this PIO effective ____________.

SANDAG AGREES:

1. To the terms and conditions defined by the MASTER AGREEMENT for reimbursable services the purpose of working with CALTRANS on the PROJECT.

2. To invoice CALTRANS in advance based on monthly expenditure projections for the PROJECT. The first invoice shall not exceed $300,000, and all invoices in total shall not exceed $950,000.

3. To the extent that completion of the PROJECT exceeds $950,000, the parties shall meet and confer and agree to either reduce the scope of the PROJECT or increase the maximum amount of this PIO.
4. To use up to $945,000 of the capacity of one of its JOC contracts to complete PROJECT.

5. To reimburse CALTRANS upon completion of the PROJECT any amount paid to SANDAG under this PIO in excess of that amount expended for JOC work and SANDAG staff expenditures under this PIO.

6. The SANDAG PROJECT MANAGER and contact information is:

   Richard Chavez  
   Principal Transportation Engineer  
   401 B Street, Suite 800  
   San Diego, CA 92101  
   (619) 699-6989  
   rch@sandag.org

   If SANDAG wishes to change the assigned PROJECT MANAGER, SANDAG must first discuss this change with CALTRANS.

CALTRANS AGREES:

1. To the terms and conditions defined by the MASTER AGREEMENT for the purpose of working with SANDAG on the PROJECT.

2. To pay SANDAG in advance for staff expenditures associated with administering PROJECT, which shall include a staff overhead rate of seventeen percent (17%) in a total amount of $5,000.

3. To pay SANDAG in advance for JOC work associated with the PROJECT up to $945,000 to be invoiced as provided herein.

4. To provide advance payment to SANDAG within forty five (45) days of receipt of invoices.

5. The CALTRANS PROJECT MANAGER and contact information is:

   Ismael “Pye” Salazar  
   SR 905 Project Manager  
   4050 Taylor Street  
   San Diego, CA 92110  
   (619) 688-6766  
   ismael.salazar@dot.ca.gov

   If CALTRANS wishes to change the assigned PROJECT MANAGER, CALTRANS must first discuss this change with SANDAG.
THE PARTIES MUTUALLY AGREE:

1. The PROJECT SPONSOR shall be CALTRANS.
2. The CONTRACT ADMINISTRATOR shall be CALTRANS.
3. The IMPLEMENTING AGENCY for the PROJECT shall be CALTRANS.
4. The LEAD AGENCY for the PROJECT shall be CALTRANS.
5. Applicable CALTRANS STANDARDS shall be used for the PROJECT related to State Highway System FACILITIES.
6. This PIO will terminate when work on the PROJECT is complete, or on December 31, 2012, whichever occurs later.

CALTRANS

SAN DIEGO ASSOCIATION OF GOVERNMENTS

________________________________________  __________________________________________
LAURIE BERMAN                                GARY L. GALLEGOS
District 11 Director                          Executive Director

________________________________________  __________________________________________
ROSS CATHHER                                  Office of the General Counsel
Deputy District Director

APPROVED AS TO FORM:                          APPROVED AS TO FORM:

________________________________________  __________________________________________
CALTRANS Legal Counsel                       Office of the General Counsel
EXTENSION REQUESTS FOR FY 2011 
TRANSPORTATION DEVELOPMENT ACT AUDITS

File Number 1500300

Introduction
In accordance with California Public Utilities Code (PUC) Section 99245, each Transportation Development Act (TDA) claimant must submit an audit within 180 days after the end of the fiscal year. SANDAG may grant a 90-day extension, bringing the deadline to March 26, 2012. No further extensions are permitted.

The TDA audit fieldwork for most of the claimants is complete; however, there are a few claimants that may not be completed within the required timeframe. The TDA audit requirements are governed by the California PUC and the California Code of Regulations, which specifically prohibit approval of the FY 2013 TDA allocations until the FY 2011 TDA audits are submitted to the State Controller’s Office.

Background
SANDAG, acting as the Regional Transportation Planning Agency (RTPA) for the San Diego region, is to receive the annual fiscal compliance audit report from each claimant within 180 days of the fiscal year end. The RTPA may grant a 90-day extension as it deems necessary. While every effort is made to complete all audits within the 180 days, there are certain situations in which an extension request may be appropriate. The Cities of National City, San Diego, and San Marcos, and SANDAG are requesting an extension to allow sufficient time to provide final documentation for the draft audit review process.

All four claimant agencies requesting an extension are expected to issue the audit reports no later than March 26, 2012.

Recommendation
The Board of Directors is asked to approve Transportation Development Act audit extension requests for the Cities of National City, San Diego, and San Marcos, and SANDAG, until March 26, 2012, as permitted by the California Public Utilities Code and the California Code of Regulations.

GARY L. GALLEGOS
Executive Director

Key Staff Contact: Lisa Kondrat-Dauphin, (619) 699-1942, lko@sandag.org
FIRST READING OF PROPOSED AMENDMENTS TO COMPREHENSIVE FARE ORDINANCE AND TITLE VI FINDINGS RELATING TO AMENDMENTS

File Number 3320100

Introduction

The Board of Directors is asked to conduct the first reading of an amended Regional Comprehensive Fare Ordinance that implements permanent fare decreases requested by the North County Transit District (NCTD), as well as add language that clarifies, simplifies, and better codifies the fare rules for the region. Two public meetings were held to provide the public the chance to review, ask questions, and offer comments regarding the proposed changes. A summary of the comments received at the time the agenda was sent out is provided in Attachment 1. The proposed changes in the language of the Fare Ordinance have been coordinated with the staffs of both NCTD and Metropolitan Transit System (MTS).

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

Action requested at the December 9, 2011, Board of Directors meeting is to hold the first reading of the proposed amendments to the Regional Comprehensive Fare Ordinance and find that the proposed fare changes will not cause a disparate impact under the Title VI of the federal Civil Rights Act.

Discussion

Overview of Proposed Fare Changes

In September 2010, the NCTD Board of Directors approved promotional fare decreases on the COASTER, BREEZE, and LIFT services for January 2011 implementation. Per Section 9.2 of the Regional Comprehensive Fare Ordinance MTS and NCTD 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. The table below shows the original fares and the current promotional fares. These fare reductions were one of part of an overall strategy by NCTD to enhance ridership and revenue.

- **BREEZE** - The One-Way Regular Cash Fare was reduced from $2.00 to $1.75 ($1.00 to $0.75 for Senior/Disabled/Medicare (SDM) fares)\(^1\);

- **COASTER** - The One-Way Regular Cash Fare was reduced from a range of $5.00-$6.50 to a range of $4.00-$5.50 (and from a range of $2.50-$3.25 for SDM fares to $2.00-$2.75);

- **COASTER** - The number of COASTER zones was reduced from four zones to three zones;

- **COASTER** - The Regular COASTER Monthly Pass prices were reduced from a range of $144.00-$182.00 to a range of $120.00-$165.00 (and a reduction of $45.50 to $41.25 for SDM passes);

- **COASTER** - The discount for Single Ride and Round Trip tickets was changed to a $0.50 discount on Single Ride tickets for those with Regular, Youth, or SDM monthly passes on Compass Cards, and a $1.00 discount on Round Trip tickets for those with Regular, Youth, or SDM monthly passes on Compass Cards.

In September 2011, the NCTD Board of Directors requested SANDAG to make these changes permanent. NCTD also has requested the new Rail2Rail agreement with Amtrak be added into the Regional Comprehensive Fare Ordinance where monthly pass holders would have the ability to ride Amtrak trains within the same zones as permitted by the COASTER monthly pass as follows:

- **COASTER** - Establishment of supplement for Rail2Rail COASTER monthly pass upgrade ($59.00 for one-zone pass and $84.00 for three-zone pass) for Adult, SDM and Youth monthly passes

**Additional Modifications**

Two additional modifications are proposed to the Regional Comprehensive Fare Ordinance:

- **RegionPlus Day Pass** – Reduce from $14 to $12, which would bring the day pass used on the COASTER fare in line with the reductions in COASTER Cash and Monthly Pass fares

- **Revision of eligibility to purchase discounted passes for persons with disabilities** to make them consistent with Federal Transit Administration (FTA) regulations and guidance.

The proposed changes to the Regional Comprehensive Fare Ordinance are included as Attachment 3.

**Title VI Assessment**

Title VI of the Civil Rights Act requires that potential adverse impacts from the proposed changes on minority and low-income populations be identified and addressed. A Title VI Assessment was conducted relative to the proposed fare changes (Attachment 2) and concludes that the proposed fare changes will not cause a disparate impact on minority or low-income populations. The Board of Directors is asked to adopt a finding consistent with the conclusions in the Assessment.

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\(^1\)This change also impacts the Americans with Disabilities Act (ADA) Paratransit fare, which would decrease to $3.50 based on a rate of double the local fixed-route fare (Section 11 of the Fare Ordinance).
CEQA Compliance

The California Environmental Quality Act (CEQA) provides that CEQA does not apply to the “establishment, modification, structuring, restructuring, or approval of rates, tolls, fares, or other charges by public agencies” that the public agency finds in writing are for specified purposes, including meeting operating expenses. Based on the increased ridership and commensurate increased revenue realized during the promotional fare decrease period, it is projected that a continuation of those fare decreases will continue that increased revenue stream.

In order to establish a basis for this CEQA exemption, the Board of Directors is asked to make a finding that that the fare modifications set forth in the proposed Regional Comprehensive Fare Ordinance amendment are calculated to increase NCTD revenue to help NCTD meet its operating expenses as set forth in Resolution No. 2012-12 (Attachment 4).

Public Meetings

Two public meetings were held to provide the public the chance to review, ask questions, and offer comments regarding the proposed changes. The public meetings were held in accordance with the SANDAG Public Participation Policy (Board Policy No. 025), and provided an opportunity for members of the public in North San Diego County to comment on the proposed changes to the Regional Comprehensive Fare Ordinance. The proposed fare changes were posted in English and Spanish on all MTS and NCTD services, and on the SANDAG Web site and Facebook page in advance of the public meetings. In addition, advertisements were placed in English and Spanish language newspapers. For those that were unable to attend the meetings, a phone line and e-mail address were provided for comment.

The first meeting was held at the NCTD offices on Thursday, November 17, 2011, from 6 to 8 p.m., and the second meeting was held at SANDAG on Friday, November 18, 2011, from 12 noon to 2 p.m. There were two public attendees at the NCTD meeting and three attendees at the SANDAG meeting.

Only minor comments were received; Attachment 1 includes all comments received from the public meetings, e-mail, and phone messages.

Next Steps

The second reading of the amended Regional Comprehensive Fare Ordinance is scheduled for the Board of Directors meeting on December 16, 2011. The Fare Ordinance changes are scheduled to go into effect on January 20, 2012, after the minimum 30-day waiting period mandated by Board Policy No. 004.

GARY L. GALLEGOS
Executive Director

Attachments: 1. Public Comments on Proposed Fare Changes
2. Title VI Fare Proposal Evaluation, November 2011
3. Proposed Changes to the Regional Comprehensive Fare Ordinance
4. Resolution No. 2012-12, Findings in Support of Notice of Exemption under the California Environmental Quality Act relating to Fare Modifications Incorporated into an Amended Regional Comprehensive Fare Ordinance

Key Staff Contact: Brian Lane, (619) 699-7331, bla@sandag.org
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<th>Date</th>
<th>Contact Method</th>
<th>Comment</th>
<th>Name</th>
</tr>
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<tbody>
<tr>
<td>11/4/2011</td>
<td>Phone</td>
<td>Resident would like more information on what is meant by &quot;revision of eligibility&quot; in regards to whom the fare change will affect.</td>
<td>Carolyn Cox</td>
</tr>
<tr>
<td>11/16/2011</td>
<td>Phone</td>
<td>Rider suggests that eligibility for SDM should not change, as long as you have a Doctor's note.</td>
<td>Dean</td>
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<tr>
<td>11/17/2011</td>
<td>Public Meeting</td>
<td>Rider suggested that a regional SDM Pass good for all services be made available at a price that is low enough for low-income riders.</td>
<td>Mystie Bollaert</td>
</tr>
<tr>
<td>11/17/2011</td>
<td>Public Meeting</td>
<td>Rider commented that reinstating the Transfer From Transit discount was a good thing.</td>
<td>Glenn Leider</td>
</tr>
<tr>
<td>11/18/2011</td>
<td>Public Meeting</td>
<td>Rider commented that he wanted a higher price for the SDM card, as most seniors have a large pension.</td>
<td>John G. Wotzka</td>
</tr>
<tr>
<td>11/18/2011</td>
<td>Public Meeting</td>
<td>Rider was pleased with the NCTD fare reductions. Rider commented on need for SDM Day Pass that could be sold on all buses as well as trolley. He also wanted pictures on SDM cards to be mandatory, but free for the first issuance.</td>
<td>Reginald Tisdale</td>
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<tr>
<td>11/21/2011</td>
<td>Phone</td>
<td>Rider was pleased with the COASTER fare reductions, but wished there was a better discount for SDM riders.</td>
<td>Helen Bourne</td>
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TITLE VI
FARE PROPOSAL EVALUATION
FOR THE SAN DIEGO REGION

November 2011
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Table 3: COASTER Zone Analysis
Table 4: Minority and Low Income Status of Persons with Disabilities

1 Chapter order intentional to reflect the corresponding chapters outlined in the May 13, 2007, Federal Transit Administration (FTA) Circular (FTA C 4702.1A).
INTRODUCTION

This Federal Civil Rights Title VI analysis has been prepared to evaluate proposed changes to the Regional Comprehensive Fare Ordinance scheduled for implementation in January 2012 (“2012 Fare Ordinance”). The 2012 Fare Ordinance would be approved by the San Diego Association of Governments (SANDAG) and affect passengers riding bus and rail services operated by Metropolitan Transit System (MTS) and North County Transit District (NCTD) and in some instances passengers transferring between MTS and NCTD. The changes are largely based on converting temporary NCTD fares (implemented by NCTD in January 2011) to permanent fares.

The analysis, prepared by SANDAG, assesses how the proposal will affect different transit rider populations and determines if any of the proposed fare changes will result in disproportionately high and adverse effects on low-income, minority, and low-income minority (LIM) populations within the San Diego region. The report also discusses available alternatives and mitigation of any identified impacts.

Background and Responsibility

The Regional Comprehensive Fare Ordinance approved by the SANDAG Board of Directors sets the fares for MTS and NCTD. The Fare Ordinance includes a provision that allows the transit agencies to implement “temporary, promotional, and experimental fares.” Section 9.2 of the Fare Ordinance elaborates that these fares “are defined as fares implemented for no more than twelve months for seasonal events or for marketing purposes.” The NCTD Board of Directors implemented a temporary fare change in January 2011 that affected the BREEZE and COASTER services and connections to the COASTER for passengers holding regional fare products. NCTD has now requested that SANDAG make those temporary fares permanent. This report evaluates those changes and others scheduled for implementation in January 2012.

Title VI Requirements

Title VI of the Civil Rights Act of 1964 (42 U.S.C. 2000d) states that: “No person in the United States shall, on the grounds of race, color, or national origin, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any program or activity receiving federal financial assistance.” The scope of Title VI was expanded by the Civil Rights Restoration Act of 1987 (P.L. 100-209) to include all of a recipient’s and contractor’s programs or activities whether federally assisted or not.

The February 11, 1994, Executive Order 12898, “Federal Actions to Address Environmental Justice in Minority Populations and Low-Income Populations” added low-income populations to minority populations and required that “disproportionately high and adverse human health or environmental effects” be identified and addressed. The federal guidelines (May 13, 2007, FTA C 4702.1A) defines disproportionate impacts as those that “will be suffered by minority population and/or low-income population and are appreciably more severe or greater in magnitude than the adverse effect that will be suffered by the non-minority population and/or non-low-income population.” Environmental justice applies to all programs, policies, and activities being evaluated and is consistent with Title VI of the Civil Rights Act of 1964. Executive Order 12898 also requires public involvement and mandates that transportation agencies ensure there is no exclusion from participation, no denial of benefits, and no discrimination in the services that they provide to LIM populations.
TITLE VI METHODOLOGY, DATA COLLECTION, AND RESULTS

Methodology for Fare Analysis

The fare analysis methodology is from the SANDAG Title VI Fare Change Methodology, which conforms to the requirements of the FTA Title VI Circular 4702.1A. This methodology is used to determine if the proposed fare changes have a disproportionately high and adverse effect on minority or low-income riders. In order to address the mandates in Title VI of the Civil Rights Act of 1964, the environmental justice provisions in Presidential Executive Order 12898, as well as the guidance from the Circular and SANDAG policy, the analysis evaluates low-income, minority, and collectively LIM population impacts. SANDAG uses this methodology when a fare change impacts the Regional Comprehensive Fare Ordinance, for which SANDAG is responsible.

This section discusses the four-step process that SANDAG follows to evaluate potential Title VI impacts for fare changes. In order to conduct these steps, SANDAG first collects data relevant to the Title VI fare analysis process as outlined below. A description of the proposed fare changes also is included to frame the discussion.

Data Collection

In order to comply with the Civil Rights Act and Executive Order 12898, SANDAG utilizes information generated from the SANDAG 2009 Onboard Ridership Survey to understand the region’s transit ridership in relation to fare usage patterns and low-income and minority populations. Using the information from ridership surveys provides information on whether low-income and minority riders are more likely to use the mode of service, payment type, or payment media that would be subject to the proposed fare adjustments.

To collect the information for the Onboard Passenger Survey, surveyors rode onboard buses, trolleys, and the COASTER, offering survey forms to passengers as they boarded the vehicle. Surveys were self-administered; however, the surveyors were available for questions. When passengers completed the questionnaires, they were collected and tracked by route, date, trip time, and direction. The data then was coded, entered, and analyzed. The surveys were provided in English and Spanish.

In order to provide the Title VI evaluation, a complete analysis of transit modes and fare payment type/media was conducted using the data derived from the onboard survey. Specific cash fare and pass types were separated based on the proposed changes to the 2012 Fare Ordinance. Copies of the SANDAG Onboard Transit Survey instruments are included in Appendix A of this document.

Minority riders were those individuals who stated on the survey that they considered themselves anything other than white (non-Hispanic). Low-Income riders were persons who indicated that their household income was below 100% of the federal poverty guidelines.²

² The low-income threshold is based on the guidelines from federal Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU) guidance.
The survey data collection effort revealed that 80.4 percent of MTS riders are considered to be LIM, while 75.6 percent of NCTD riders are LIM. The regionwide average (MTS and NCTD combined) is 79.8 percent. The low-income and minority averages also were developed and are shown along with the combined LIM averages in Table 1.

While every attempt was made to evaluate each component of the proposed fare changes from the survey data, analysis of a few categories were limited or needed to be adjusted based on the limitations of the available data. Specifically, a thorough evaluation of Senior, Disabled, and Medicare (SDM) riders (monthly pass holders and cash riders) was not available since the data enabled only the identification of seniors within this category. Youth monthly pass changes (available to youth ages 6 through 18) were not evaluated since the survey did not include individuals under 13 years old. Since the evaluation of these specific riders could not be performed, these two groups were assumed to be low-income and minority if the general population survey of that particular fare type or category was determined to be low-income, minority, or LIM. NCTD LIFT (Americans with Disabilities Act [ADA] Paratransit service) fare changes also were not specifically evaluated since they are tied directly to changes in the BREEZE fare.

Table 1: Total LIM Population by Ridership Surveys in the San Diego Region

<table>
<thead>
<tr>
<th>Service Area</th>
<th>% Total Low-Income</th>
<th>% Total Minority</th>
<th>% Total LIM</th>
</tr>
</thead>
<tbody>
<tr>
<td>MTS</td>
<td>49.3%</td>
<td>65.7%</td>
<td>80.4%</td>
</tr>
<tr>
<td>NCTD</td>
<td>47.9%</td>
<td>57.8%</td>
<td>75.6%</td>
</tr>
<tr>
<td>Regional Total</td>
<td>49.1%</td>
<td>64.7%</td>
<td>79.8%</td>
</tr>
</tbody>
</table>

† Based on valid surveys

Proposed Fare Changes

The proposed 2012 Fare Ordinance amendment includes the following changes:

- **BREEZE** – Change in One-Way Regular Cash Fare from $2.00 to $1.75 ($1.00 to $0.75 for SDM)³;
- **COASTER** – Change in One-Way Regular Cash Fare from a range of $5.00 to $6.50 to a range of $4.00 to $5.50 ($2.50-$3.25 to $2.00-$2.75 for SDM);
- **COASTER** – Change in COASTER zones from four zones to three zones; from two zones to one zone within NCTD and no change within MTS service area).
- **COASTER** – Change Regular Monthly Pass Fares from a range of $144.00 to $182.00 to a range of $120.00 to $165.00 ($45.50 to $41.25 for SDM);

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³ This change also impacts the ADA Paratransit fare, which would decrease to $3.50 based on a rate of double the local fixed-route fare (Section 11 of the Fare Ordinance).
COASTER – Change discount for Single Ride and Round Trip tickets to a $0.50 discount on single ride tickets for those with Regular, Youth, or SDM monthly passes on Compass Cards and a $1.00 discount on Round Trip tickets for those with Regular, Youth, or SDM monthly passes on Compass Cards.

COASTER - Establishment of supplement for Rail2Rail COASTER monthly pass upgrade ($59.00 for one-zone pass and $84.00 for three-zone pass) for Adult, SDM, and Youth monthly passes;

Premium Express – Eliminate transfer discounts for regional day pass riders;

RegionPlus Day Pass – Reduce from $14.00 to $12.00;

Revision of eligibility to purchase discounted passes for persons with disabilities.

Background on Fare Changes

During the past several years, NCTD has faced an increasingly difficult economic environment. State transit funds have been reduced and revenues derived from local sales tax collections have declined dramatically. Ridership also has suffered as local unemployment rates increased above ten percent. Accordingly, NCTD investigated a number of options to enhance ridership and revenue. NCTD believes that the BREEZE and COASTER fares changes have the potential to spur ridership in this slowly recovering economic environment.

NCTD BREEZE Changes

NCTD believes that BREEZE fare decreases will attract new ridership, cancelling out any declines in revenues from existing cash fare riders. NCTD estimated, however, that if BREEZE ridership remained unchanged, the annual revenue loss from decreasing the BREEZE cash fare from $2.00 to $1.75 (and the SDM cash fare from $1.00 to $0.75 and associated ADA Paratransit fare change) would be about $310,000 annually.

NCTD COASTER Changes

NCTD also believes that declining cash and pass COASTER fares will bring new ridership to the service, cancelling any negative impact of the fare decreases. However, NCTD projected that under the worst case scenario, if ridership remained unchanged on the COASTER, the annual revenue loss from the proposed reduced fares would be about $760,000. The reduction of the $14.00 day pass also would bring the day pass fare in line with the reductions in cash and monthly pass fares.

NCTD staff also believes that reducing the $2.00 transfer from transit discount to $0.50 for passengers holding Regional Pass products would bring the transfer benefit in line with the overall reduction COASTER cash fares. Additionally, NCTD came to an agreement with Amtrak and proposes to implement a Rail2Rail program, where monthly pass holders can ride Amtrak trains within the same zones as permitted by the COASTER monthly pass. With the new program, a monthly supplement of $56 for one zone or $84 for three zones must be purchased. There are no discounts for SDM or Youth pass holders.
Steps 1 through 4

After the data collection process is completed and the proposed fare changes are articulated, staff follows a four-step process to determine if any Title VI impacts are created by the fare changes. These steps are discussed and evaluated below.

Step 1: Assess Whether Minority or Low-Income Groups Will Be Affected

In order to determine whether a change to the Fare Ordinance will result in a disproportionately high and adverse effect on low-income or minority populations, SANDAG uses the survey data to identify who will be impacted by the proposed change. For proposed changes that would increase or decrease fares on certain transit modes or by fare payment types or payment media, SANDAG analyzes any available information generated from ridership surveys indicating whether minority or low-income riders are more likely to use the mode of service, payment type, or payment media that would be subject to the fare change.

The following table shows whether minority or low-income groups will be affected by the proposed changes. For each fare type, the ridership is considered to be low-income, minority, or LIM if the survey average for the fare product is above the averages shown in Table 12.
Table 2: Proposed Fare Change Low-Income, Minority and LIM Evaluation

<table>
<thead>
<tr>
<th>Fare Type</th>
<th>Existing Fare</th>
<th>Proposed Fare</th>
<th>% Change From Existing</th>
<th>Low-Income?</th>
<th>Minority?</th>
<th>LIM?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cash Fares</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BREEZE</td>
<td>$2.00</td>
<td>$1.75</td>
<td>-12.5%</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>COASTER 1-Zone</td>
<td>$5.00 to $5.50</td>
<td>$4.00</td>
<td>-20.0% to -27.3%</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>COASTER 2-Zone</td>
<td>$5.50 to $6</td>
<td>$5.00</td>
<td>-9.1% to -16.7%</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>COASTER 3-Zone</td>
<td>$6.00 to $6.50</td>
<td>$5.50</td>
<td>-8.3% to -15.4%</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>COASTER One-Way Transfer from Transit Discount with a Compass Pass</td>
<td>$3 to $4.50 (after the $2.00 discount)</td>
<td>$3.50 to $5.00 (after the $0.50 discount)</td>
<td>+11.1% to +16.7%</td>
<td>No**</td>
<td>No**</td>
<td>No**</td>
</tr>
<tr>
<td><strong>Regional Day, MultiDay, or Calendar Month Passes</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>RegionPlus Day Pass (includes MTS Premium Express Bus and NCTD COASTER)</td>
<td>$14.00</td>
<td>$12.00</td>
<td>-14.3%</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td><strong>COASTER Monthly Pass Fares</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>COASTER 1-Zone</td>
<td>$144.00 to $154.00</td>
<td>$120.00</td>
<td>-16.7% to -22.1%</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>COASTER 1-Zone SDM</td>
<td>$45.50</td>
<td>$41.25</td>
<td>-9.3%</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>COASTER 1-Zone Youth</td>
<td>$82.50</td>
<td>$91.00</td>
<td>-9.3%</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>COASTER 2-Zone</td>
<td>$154.00 to $170.00</td>
<td>$150.00</td>
<td>-2.6% to -11.8%</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>COASTER 2-Zone SDM</td>
<td>$45.50</td>
<td>$41.25</td>
<td>-9.3%</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>COASTER 2-Zone Youth</td>
<td>$82.50</td>
<td>$91.00</td>
<td>-9.3%</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>COASTER 3-Zone</td>
<td>$170.00 to $182.00</td>
<td>$165.00</td>
<td>-2.9% to -9.3%</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>COASTER 3-Zone SDM</td>
<td>$45.50</td>
<td>$41.25</td>
<td>-9.3%</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>COASTER 3-Zone Youth</td>
<td>$82.50</td>
<td>$91.00</td>
<td>-9.3%</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>COASTER Rail2Rail 1-Zone Adult</td>
<td>$144.00 to $154.00</td>
<td>$179.00</td>
<td>+16.2% to +24.3%</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>COASTER Rail2Rail 1-Zone SDM</td>
<td>$45.50</td>
<td>$97.25</td>
<td>+113.7%</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>COASTER Rail2Rail 1-Zone Youth</td>
<td>$91.00</td>
<td>$138.50</td>
<td>+52.2%</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>COASTER Rail2Rail 3-Zone Adult</td>
<td>$182.00</td>
<td>$249.00</td>
<td>+36.8%</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>COASTER Rail2Rail 3-Zone SDM</td>
<td>$45.50</td>
<td>$125.25</td>
<td>+175.3%</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>COASTER Rail2Rail 3-Zone Youth</td>
<td>$91.00</td>
<td>$166.50</td>
<td>+83%</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>

** Based on MTS Local and Corridor services.

Based on the above table, low-income, minority, and LIM riders would be impacted by the proposed BREEZE cash fare reduction.
**Step 2: Assess Alternatives Available for People Affected by Proposed Fare Change**

SANDAG considers what, if any, alternative transit modes, fare payments types, or fare payment media are available for people affected by the fare change. These alternatives are developed if the fare change disproportionately affects low-income, minority, or LIM riders. To determine this, an in-depth cost comparison was performed on the proposed BREEZE and COASTER fares. The COASTER one-way cash fare cost reduction ranges between -27.3 percent and -8.3 percent as shown in Table 2, depending on the zone. To understand the average cost reduction, onboard ridership data was used to weight the cost differences based on what fare was paid during the time of the survey and what fares would change based on the fare decreases. This analysis revealed that, cumulatively, the COASTER cash fare reduction is -13.3 percent when weighted by actual surveyed ridership data. Since this is similar to the BREEZE flat fare reduction (-12.5 percent), it was determined that the fare changes did not represent a disproportionate impact. Therefore, no alternatives or mitigation were considered. Additionally, the proposed RegionPlus decrease of -14.3 percent fell within this range. Based on this analysis, no alternatives analysis was conducted. On the other hand, the change in transfer from transit benefits for individuals holding Compass Passes represents an increase in cash fare price. Based on the analysis, however, those individuals are not a majority low-income, minority, or LIM.

**Step 3: Describe Proposed Mitigation**

No mitigation was required based on the analysis conducted in Step 2.

**Step 4: Determine if there is a Disproportionate High and Adverse Impact**

Under this step, SANDAG determines which, if any, of the proposed alternative fare changes under consideration would have a disproportionately high and adverse effect on minority and low-income riders after any proposed mitigation steps. Disproportionately high and adverse effects may exist if the population using that fare consists of more LIM than non-LIM populations AND the fare change is significantly higher (as a percent) than other proposed non-LIM fare changes.

SANDAG may implement a change to the Ordinance that would create disproportionately high or adverse effects on low-income and/or minority populations after taking into account proposed mitigation measures, provided that SANDAG can demonstrate that the action meets a substantial need that is in the public interest. There were no disproportionate high or adverse impacts from any of the fare changes based on the analysis conducted in Step 2.

**Other Considerations**

**NCTD COASTER Zones**

The proposed changes to COASTER cash and pass fares are not limited to the dollar value of the passes or fares. NCTD also is proposing to change the zone structure from four zones to three. Furthermore, this change effectively consolidates the two North County zones into one zone (the only zones directly in NCTD territory) while the other two zones (both in MTS territory) remain unchanged. While all COASTER fares will decrease with the proposed changes, the northernmost zone (“Zone 1” including the stations of Oceanside and Carlsbad Village) receive an additional

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4 Typically, day passes are priced slightly higher than the combination of two one-way fares.
benefit through the consolidation of zones. This type of fare change falls outside the current fare methodology (other than to evaluate the range of changes proposed as shown in Table 2) and is, therefore, not explicitly included in the preceding four-step process. However, an analysis of trips including “Zone 1” (those with the additional cost reduction) versus all other trips revealed the following Title VI analysis (Table 3).

Table 3: COASTER Zone Analysis

<table>
<thead>
<tr>
<th>Fare Type</th>
<th>Low-Income?</th>
<th>Minority?</th>
<th>LIM?</th>
</tr>
</thead>
<tbody>
<tr>
<td>All COASTER Trips Including Zone 1</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>(Oceanside and Carlsbad Village)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>All Other COASTER Trips (Zones 2 – 4)</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>

Since the trips utilizing Zone 1 also are non-LIM, there would be no disproportionately high and adverse effects from the consolidation of zones. Additionally, the LIM average for trips, including Zone 1, was 43 percent while the other trips (Zones 2 through 4) had a LIM average of 29 percent. Therefore, those receiving the additional benefit traveling to or from Zone 1 are more LIM than those not receiving the additional benefit.

Changing Disabled Eligibility Requirements

The Fare Ordinance currently establishes the eligibility requirements that allow persons with disabilities to purchase discounted transit fares, including both one-way trips and unlimited ride passes on fixed route services. The language in the Fare Ordinance (Section 2.24) is not consistent with the current practice of either MTS or NCTD, nor is it consistent with FTA regulations or guidance concerning reduced fares for persons with disabilities. SANDAG is proposing to clarify the current provisions of Section 2.24 with language from the FTA regulations to improve clarity.

Specific income and race data are not available for purchasers of MTS and NCTD Compass identification cards for persons with disabilities. Data is available for persons who use SDM fares and are under the age of 60. This data includes both persons with disabilities, as well as people using Medicare cards. Those persons under age 60 who have a Medicare card are suffering from a debilitating disability or disease, and it is expected that their minority or income status is similar to the minority/income status of the general disabled population. The results are shown in Table 4, based on the inclusion of Medicare cardholders.

Table 4: Minority and Low Income Status of Persons with Disabilities

<table>
<thead>
<tr>
<th>Analysis of People Paying Reduced Fare</th>
<th>All Transit Passengers</th>
<th>Disabled and Medicare Passengers</th>
<th>Disabled and Medicare Passengers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minority</td>
<td>63.5%</td>
<td>64.0%</td>
<td>Yes</td>
</tr>
<tr>
<td>Low-Income</td>
<td>62.4%</td>
<td>55.0%</td>
<td>No</td>
</tr>
</tbody>
</table>
Table 4 shows that persons under age 60 who pay fares by showing a transit identification for persons with disabilities or a Medicare card have a similar minority percentage as the overall transit system, but a lower percentage of persons with disabilities and Medicare cardholders are low-income. However, it is not known specifically which persons, if any, may lose their eligibility to pay discounted fares with the change to the Fare Ordinance. The revisions to the language of the Fare Ordinance will bring SANDAG into compliance with FTA and reduce the potential for persons to fraudulently acquire disabled identification cards. It is, therefore, in the public interest to make this amendment to Section 2.24 of the Fare Ordinance.
SAN DIEGO ASSOCIATION OF GOVERNMENTS

PROPOSED CHANGES TO THE REGIONAL 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 ([Title 49, Part 37 of the Code of Federal Regulations](https://www.transportation.gov/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 half 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, AND MULTI-DAY FARES**

3.1 **Fare Product Limitations**

3.1.1 SPRINTER/BREEZE fare products may only be used on the SPRINTER, 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 RegionPlus 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.
The following tables show the proposed fares and the existing fares. Those items that are changing are shown in strike-out/underline in both tables.

### Table 1  
**Proposed Fare Ordinance**  
Pass Prices, Acceptance, and Required Supplements or Discounts

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1. Monthly only  
2. RegionPlus Pass Accepted

### (Existing Fare Ordinance)  
Pass Prices, Acceptance, and Required Supplements or Discounts

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2. RegionPlus Pass Accepted
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(Proposed Fare Ordinance)

Single Boarding Fares by Service, Acceptance, Required Supplements, and Discounts

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**Special Notes for Tables 1 and 2.**

*1 $2.00 Discount for Regular and Youth; $1.00 Discount for Senior/Disabled/Medicare. **Calendar Monthly Only**

*2 **RegionPlus Day Pass Accepted**

*3 $0.50 Discount on Single Ride Tickets for Regular, Youth, and Senior/Disabled/Medicare Passes on Compass Pass; $1.00 Discount on Round Trip Tickets for Regular, Youth, & Senior/Disabled/Medicare Passes on Compass Pass.

*2 $4.00 Supplement for Regular and Youth; $2.00 Supplement for Senior/Disabled/Medicare.

*3 $8.00 Supplement for Regular and Youth; $4.00 Supplement for Senior/ Disabled/Medicare.

*4 $2.00 Supplement for Regular and 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 round trip ticket or pass based on the number of zones between their origin and destination.

Table 3
COASTER Stations and Zones

<table>
<thead>
<tr>
<th>To</th>
<th>From</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>
<td>1</td>
<td>1</td>
<td>21</td>
<td>21</td>
<td>21</td>
<td>21</td>
<td>21</td>
<td>43</td>
<td>43</td>
</tr>
<tr>
<td>Carlsbad Village</td>
<td>21</td>
<td>21</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Carlsbad Poinsettia</td>
<td>21</td>
<td>21</td>
<td>1</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Encinitas</td>
<td>21</td>
<td>21</td>
<td>1</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Solana Beach</td>
<td>21</td>
<td>21</td>
<td>1</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Sorrento Valley</td>
<td>32</td>
<td>32</td>
<td>2</td>
<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>43</td>
<td>43</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>2</td>
<td>2</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Santa Fe Depot</td>
<td>43</td>
<td>43</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>2</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>

One-way and round trip 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 Road and Alpine Boulevard), 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 and 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 also may 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 also will 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 4
2, 3, and 4 Day Pass Prices

<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 RegionPlus Day Pass

A RegionPlus 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 RegionPlus 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 RegionPlus 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 RegionPlus Juror Day Passes sold to the courts shall be based on the price of the RegionPlus 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>
<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>
<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 RegionPlus 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 RegionPlus 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 AND 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 round trip 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, SPRINTERT, 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 and 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

The 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; or, for an upgrade fee ($59 for a one-zone pass, and $84 for a three-zone pass) payable to Amtrak, persons holding a valid COASTER Pass may ride the Amtrak between Oceanside, Solana Beach, and Santa Fe Depot within the zones listed on their Compass 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, and 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 AND YOUTH COMPASS CARDS ELIGIBILITY AND 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 and 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 health 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
10.4 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 RegionPlus 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, 2009January 20, 2012. 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 8th of May 200916th of December 2011.

________________________________________           ATTEST: ________________________________________

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 May 8, 2009December 16, 2012, at the time and by the vote stated above, which said Ordinance is on file in the office of SANDAG.

DATED: ______________________________, 201209

________________________________________

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.
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.
SENIOR/DISABLED/MEDICARE AND YOUTH
PASS REVENUE ALLOCATION FORMULA

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 five percent to SANDAG. Direct payments to participating agencies (i.e., Trolley for special event coordination) shall be deducted from the five percent net revenue submitted to SANDAG. Based on the data provided by NCTD, SANDAG shall forward the five 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 the 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.
FINDINGS IN SUPPORT OF NOTICE OF EXEMPTION UNDER THE CALIFORNIA ENVIRONMENTAL QUALITY ACT RELATING TO FARE MODIFICATIONS INCORPORATED INTO AN AMENDED REGIONAL COMPREHENSIVE FARE ORDINANCE

WHEREAS, a Regional Comprehensive Fare Ordinance amendment incorporating fare modifications is necessary to increase revenue to assist North County Transit District (NCTD) in meeting its operating expenses; and

WHEREAS, the SANDAG Board of Directors wishes to render written findings in support of the determination that the amended Regional Comprehensive Fare Ordinance does not require an Environmental Impact Report before it approves such amendment; and

WHEREAS, if a project falls within a category exempt by administrative regulation under the California Environmental Quality Act (CEQA), no further agency evaluation of environmental impact is required; and

WHEREAS, establishment of fares and fare modifications are exempt from CEQA pursuant to an exemption for fees charged by a public agency for the purpose of meeting operating expenses pursuant to Public Resources Code, § 21080, subd. (b)(8); and California Code of Regulations Title 14, § 15273, subd. (a); and

WHEREAS, the NCTD Board of Directors approved a promotional fare decrease in January of 2011, which has resulted in increased ridership and increased revenues for NCTD; and

WHEREAS, NCTD has requested that these promotional fare decreases be continued via an amendment to the Regional Comprehensive Fare Ordinance; and

WHEREAS, if SANDAG does not approve the proposed Regional Comprehensive Fare Ordinance amendment, including approval of the requested fare decreases, NCTD will realize an overall revenue decrease; and

WHEREAS, it has been made clear that the increased revenues obtained from the fare modification will be used for operations purposes rather than for capital improvements.
NOW THEREFORE,

BE IT RESOLVED that SANDAG makes the following findings:

NCTD has a need to make regular the temporary fare decreases, which are reflected in the proposed Regional Comprehensive Fare Ordinance amendment in order to continue the increased revenue realized through such fare modifications and to assist in meeting its operating expenses.

PASSED AND ADOPTED this 2nd of December 2011.

______________________________           ATTEST: ________________________________
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.
AMENDMENT TO THE SOUTHERN CALIFORNIA HIGH-SPEED RAIL INLAND CORRIDOR GROUP MEMORANDUM OF UNDERSTANDING AND COMMENTS ON THE CALIFORNIA HIGH-SPEED RAIL PROGRAM DRAFT 2012 BUSINESS PLAN

Introduction

Since 1993, the State of California has authorized the study of an intercity, high-speed train (HST) system that will connect the state’s metropolitan areas, including the San Diego region. The California High-Speed Rail Authority (CHSRA) is the statewide agency charged with the planning and construction of this system. SANDAG and corridor planning agencies continue to work cooperatively with the CHSRA to advance San Diego’s HST corridor.

The passage of Proposition 1A on the November 4, 2008, ballot resulted in $9 billion in bond funds for the entire statewide network. While the CHSRA has set the initial phase from Anaheim to San Francisco, work is continuing on all corridors. Additionally, the CHSRA has been awarded more than $3 billion in federal funds for HST projects. In November 2011, the CHSRA released the draft California High-Speed Rail Program Draft 2012 Business Plan, which outlines the future of the HST program. For instance, the plan calls for the state to break ground in 2012 on the 130-mile initial construction segment in the Central Valley, which will serve as the backbone for Phase 1 of the system, between Los Angeles and the Bay Area, and which is to be completed by 2033. Connections to San Diego and Sacramento will follow in a future phase. A summary of the Draft 2012 Business Plan is included as Attachment 1.

In June 2008, the SANDAG Board of Directors approved an Memorandum of Understanding (MOU) to work cooperatively with the other regional agencies along the Los Angeles to San Diego via Inland Empire corridor and the CHSRA on technical studies leading up to the project-level engineering and environmental documentation. These agencies together formed the Southern California High-Speed Rail Inland Corridor Group (SoCal ICG) and have met regularly to guide HST developments in this corridor. The last milestones for this group were the release by the CHSRA of the Preliminary Alternatives Analysis in March 2011 and the securing of state funds in September 2011 to continue planning, design and environmental work. This MOU is scheduled to expire December 31, 2011 (Attachment 2).

Recommendation

The Board of Directors is asked to: (1) approve the amended interagency MOU in substantially the same form as Attachment 2; and (2) provide comments on the draft business plan; and (3) authorize the Executive Director to issue a letter to the CHSRA containing the Board’s comments as well as those staff comments reflected in Attachment 3 regarding the draft business plan.
Discussion

Southern California High-Speed Rail Inland Corridor Group MOU

The Southern California Association of Governments (SCAG), San Diego County Regional Airport Authority (SDCRAA), Riverside County Transportation Commission (RCTC), and San Bernardino Associated Governments (SANBAG), in addition to SANDAG and the CHSRA, have approved a Memorandum of Understanding to formalize this cooperative working relationship to advance the Los Angeles to San Diego via Inland Empire HST Corridor. The Los Angeles County Metropolitan Transportation Authority (LA Metro) and Caltrans Districts 7, 8, and 11 are participating agencies. Together, these agencies make up the Southern California High-Speed Rail Inland Corridor Group (SoCal ICG).

The original MOU was executed in April 2009 once all agencies had approved and stipulated a termination date of December 31, 2011. The SoCal ICG has met each month for the past three years to guide the CHSRA’s work on planning, preliminary engineering, and environmental phases leading up to completion of the project-level Environmental Impact Report/Environmental Impact Statement (EIR/EIS) for the Los Angeles to San Diego via Inland Empire corridor. The proposed amendment to the MOU will extend the termination date through the environmental documentation process, and specifically through the Record of Decision/Notice of Determination (ROD/NOD) anticipated on December 31, 2016. There are no other significant changes to the MOU.

San Diego’s HST Connection

The Los Angeles to San Diego via Inland Empire HST section is 160 miles long, and traverses four counties and more than 100 local jurisdictions. Currently, this section is in the Alternatives Analysis phase of the project-level EIR/EIS. A Preliminary Alternatives Analysis report was released by the CHSRA for public comment on March 2, 2011. This work is funded solely through state funds.

San Diego would be connected to the state system via the Interstate 15 corridor. From the Airport Intermodal Transportation Center (ITC) proposed station location, alignment options share the existing rail corridor north to the Old Town area. Alignment alternatives then split and either continue along the existing rail corridor and future Mid-Coast light rail transit corridor to University City or head east from Old Town along Interstate 8 to State Route 163. Particular attention is being given both to the section between the ITC and University City, as this alignment is already very constrained, and to the Interstate 15 section, which also is very constrained given the pending completion of the Managed Lanes in the corridor.

California High-Speed Rail Program Draft 2012 Business Plan

The CHSRA released the California High-Speed Rail Program Draft 2012 Business Plan on November 1, 2011. According to the CHSRA, the new business plan describes a phased approach to construction that will allow the Authority to adapt to changing financial conditions as it moves forward, segment by segment. It also updates cost estimates, ridership figures, and funding expectations to reflect current economic realities.

The draft is in the midst of a 60-day public comment period to help shape the final Business Plan, which will be completed and provided to the Legislature in January 2012. The document is available on the CHSRA website at http://www.cahighspeedrail.ca.gov.
Draft SANDAG staff comments related to the Business Plan are included as Attachment 3. The comments focus on the need to provide more information on the Phase 2 segments of the HST system, using the $4 million in funding recently restored through regional legislative efforts to advance the Supplemental Alternatives Analysis Report for the Los Angeles to San Diego segment, and working with the agencies along the LOSSAN corridor to develop projects that would support near-term improvements for this key feeder route to the HST system.

**Next Steps**

Should the Board of Directors approve the amended interagency MOU and the proposed comments to the Business Plan, coordination efforts with CHSRA will continue through the working groups formed along both the Los Angeles to San Diego via Inland Empire HST section and the LOSSAN corridor.

GARY L. GALLEGOS
Executive Director

Attachments: 1. Summary of the California High-Speed Rail Program Draft 2012 Business Plan
   2. Amended and Restated MOU
   3. Draft SANDAG Comments on the California High-Speed Rail Program Draft 2012 Business Plan

Key Staff Contact: Linda Culp, (619) 699-6957, lcu@sandag.org
CALIFORNIA HIGH-SPEED RAIL: BUSINESS PLAN PRESENTATION

November 3, 2011
Introduction
Central tenets of business plan:

• Ridership forecasts re-modeled and re-evaluated; international peer review undertaken
• Updated capital and operating costs with conservative assumptions
• Reassessment of operating performance
• Risks and mitigation plans identified
• A realistic appraisal of when and how private capital could be available
• Reassessment of federal and state funding
• Development of phased, transparent and executable plan
Introduction

Updates since 2009:

- Better information on site conditions, alignments and potential impacts
- Update of capital costs and extension of planned schedule
- Definition of a phased development strategy
- Collaboration with regional rail partners and incorporation of a “blended approach” to urban areas
- Business model defined
- Independent peer reviews confirmed ridership model
- Plan requires no operating subsidies
- Secured federal funding for ICS
- Options for future public funding and private financing identified
- Frequently asked questions and criticisms considered and addressed
The Need

- Transportation systems already overburdened
- Population growth will create even more demand
- Major investments must be made
- HSR is the lower cost, more environmentally responsible choice

<table>
<thead>
<tr>
<th>Transportation Alternative</th>
<th>Added Capacity</th>
<th>Required Investment (2010$)</th>
<th>Required Investment (YOE $, through 2033)</th>
</tr>
</thead>
<tbody>
<tr>
<td>High Speed Rail</td>
<td>Phase 1, San Francisco to LA/Anaheim, 520 miles</td>
<td>65 billion</td>
<td>98 billion</td>
</tr>
</tbody>
</table>
| Highways and Aviation      | • 2,300 new miles of highway  
                          | • 115 new airport gates    
                          | • 4 new runways            | 114 billion                               | 171 billion                               |
Phasing of System

Step 1 - Initial Construction Section
Step 2 – Initial Operating Section (N or S) / blended operations
Step 3 – Bay to Basin (B2B)
Step 4 – Phase 1 Blended
Step 5 – Phase 1/Full HSR
Step 6 – Phase 2
### Construction Schedule and Costs

#### Initial Construction Section
- **2012 – 2014**

#### Initial Operating Section
- **2014 – 2020**

#### Bay to Basin
- **2020 – 2024**

#### Phase 1
- **2024 – 2036**

<table>
<thead>
<tr>
<th>Year</th>
<th>ICS</th>
<th>IOS</th>
<th>Bay to Basin</th>
<th>Phase 1 - Blended Operations</th>
<th>Phase 1 / Full HSR</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010 $</td>
<td>$5.2</td>
<td>$21.4</td>
<td>$14.2</td>
<td>$14.1</td>
<td>$10.5</td>
</tr>
<tr>
<td>Cumulative</td>
<td>$5.2</td>
<td>$26.6</td>
<td>$40.8</td>
<td>$54.9</td>
<td>$65.4</td>
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<td>YOE $</td>
<td>$6.0</td>
<td>$27.2</td>
<td>$21.1</td>
<td>$23.9</td>
<td>$19.9</td>
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<td>$6.0</td>
<td>$33.2</td>
<td>$54.3</td>
<td>$78.2</td>
<td>$98.1</td>
</tr>
</tbody>
</table>

*November 3, 2011*
Construction Costs

- 80% plus of cost increase driven by route and stakeholder concerns
- Costs based on a good knowledge of the alignment to be constructed (15+% engineering).
- Estimate is conservative:
  - Cushion of 9-years in schedule
  - $16 billion in contingency
  - $27.5 billion for inflation
Business Model

Governance
- PUBLIC
  - Ownership
  - Safety/standards
  - Contract supervision
  - Other government agreements
  - Right of way
  - Environmental approvals

Infrastructure Delivery
- PRIVATE
  - Signals & system integration
  - Superstructure construction
  - Substructure construction
  - Build stations & depots

Infrastructure Operations
- PRIVATE
  - Train dispatch/signaling
  - Infrastructure maintenance and renewal
  - Power provision
  - Station O&M

Train Operations
- PRIVATE
  - Passenger service
  - Vehicle maintenance
  - Vehicle procurement

November 3, 2011
Ridership

• Ridership re-evaluated and peer-reviewed
• Conservative assumptions
  ➢ Lower than official state population projections
  ➢ Gas price at $3.80 / gallon
  ➢ SF / LA airfare at $95 one-way
• Reduced by 15% for planning purposes
• Ramp-up of ridership over 5 years
## Operating Profits

- High, medium and low scenarios generate operating profits, no operating subsidy needed

<table>
<thead>
<tr>
<th>Year 2025</th>
<th>Ridership</th>
<th>Revenue</th>
<th>Operating Cost</th>
<th>Net Operating Profit</th>
<th>Operating Subsidy?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>IOS-South</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>High</td>
<td>10.8m</td>
<td>$1,195</td>
<td>$613</td>
<td>$582</td>
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</tr>
<tr>
<td>Medium</td>
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<td>$1,002</td>
<td>$539</td>
<td>$464</td>
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<tr>
<td>Low</td>
<td>7.4m</td>
<td>$810</td>
<td>$458</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Year 2025</th>
<th>Ridership</th>
<th>Revenue</th>
<th>Operating Cost</th>
<th>Net Operating Profit</th>
<th>Operating Subsidy?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>IOS-North</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
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<td>$904</td>
<td>$537</td>
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<td>$406</td>
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</tbody>
</table>
Revenue Breakeven

- System can withstand further reductions in ridership and breakeven - example for IOS South

<table>
<thead>
<tr>
<th>Ridership Scenario</th>
<th>2022 Revenue</th>
<th>Percent of 2022 High Ridership Revenue</th>
<th>2026 Revenue</th>
<th>Percent of 2026 High Ridership Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>High</td>
<td>$531</td>
<td>100%</td>
<td>$1,450</td>
<td>100%</td>
</tr>
<tr>
<td>Medium</td>
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<td>85%</td>
<td>$1,214</td>
<td>84%</td>
</tr>
<tr>
<td>Low</td>
<td>$370</td>
<td>70%</td>
<td>$979</td>
<td>68%</td>
</tr>
<tr>
<td>Breakeven</td>
<td>$218</td>
<td>41%</td>
<td>$247</td>
<td>17%</td>
</tr>
</tbody>
</table>
Funding and Financing

- Federal, state, local and private sources
- ICS - State bond funds ($2.7 billion); Federal grants ($3.3 billion)
- Potential new Federal programs:
  - Trust fund
  - Availability payments
  - Qualified Tax Credit Bonds
- Completion of IOS - opportunity to access $11 billion in private capital. Later phases also have private capital opportunities.
- Phased decisions allow the plan to commence section by section as funding is available
Economic Benefits

• Jobs creation – near term
  o 100,000 starting in 2012
  o 800,000-900,000 through Bay to Basin
• Jobs creation - long term
  o Based on various economic studies, experience internationally
  o 100,000-400,000 permanent jobs related to connecting economic centers, creating greater efficiencies
• Air quality
  o Reduction of 3.2 million tons CO2 emissions annually
• Traffic congestion
  o 146 million hours saved annually
Risks

• Key risks areas:
  • Funding
  • Ridership and revenue
  • Cost and schedule
  • Agreements and interfaces
  • Staffing and organization

• Risk management strategies:
  • Transfer risks where appropriate
  • Phasing strategy
  • Detailed planning
  • Conservative assumptions
  • Contingencies

Changes Since 2009

This chapter explains the major differences between the Business Plan submitted in 2009 and the new 2012 Business Plan, making it easier for the readers to understand the differences.
<table>
<thead>
<tr>
<th>FAQs</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Ridership</td>
</tr>
<tr>
<td>• Costs and schedule</td>
</tr>
<tr>
<td>• Subsidies</td>
</tr>
<tr>
<td>• Implementation</td>
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<tr>
<td>• Funding</td>
</tr>
<tr>
<td>• Private sector involvement</td>
</tr>
<tr>
<td>• Business model</td>
</tr>
<tr>
<td>• Integration with other transport systems</td>
</tr>
<tr>
<td>• Risk management</td>
</tr>
<tr>
<td>• Job creation and economic benefits</td>
</tr>
<tr>
<td>• Starting construction in Central Valley</td>
</tr>
<tr>
<td>• Management and Oversight</td>
</tr>
</tbody>
</table>
Next Steps & Process

• 60-day review period
• Funding plan approval
• Public meeting(s)
• Legislative Hearings
• Finalize and release Business Plan – January 2012
AMENDED AND RESTATED
MEMORANDUM OF UNDERSTANDING (CONTRACT # 5001186)
BY AND BETWEEN
CALIFORNIA HIGH-SPEED RAIL AUTHORITY
SOUTHERN CALIFORNIA ASSOCIATION OF GOVERNMENTS
SAN DIEGO ASSOCIATION OF GOVERNMENTS
SAN BERNARDINO ASSOCIATED GOVERNMENTS
RIVERSIDE COUNTY TRANSPORTATION COMMISSION &
SAN DIEGO COUNTY REGIONAL AIRPORT AUTHORITY

FOR PREPARATION OF STUDIES FOR
THE LOS ANGELES TO SAN DIEGO VIA INLAND EMPIRE PROPOSED HIGH-SPEED
PASSENGER RAIL CORRIDOR AND THE REGIONAL AIR-RAIL NETWORK

This Amended and Restated Memorandum of Understanding (MOU) is entered into by and between the California High-Speed Rail Authority (CHSRA), Southern California Association of Governments (SCAG), San Diego Association of Governments (SANDAG), San Bernardino Associated Governments (SANBAG), Riverside County Transportation Commission (RCTC), and San Diego County Regional Airport Authority (SDCRAA), (referred to herein individually as a PARTY and collectively as the “PARTIES” to this MOU), regarding the preparation of technical studies for the Los Angeles to San Diego via Inland Empire High-Speed Passenger Rail Corridor and a Regional Air-Rail Network Study (collectively hereinafter referred to as “PROJECTS,” and individually as “PROJECT”) with regard to the following matters:

RECITALS:

WHEREAS, CHSRA in partnership with the Federal Railroad Administration (FRA) has completed and certified a Program Environmental Impact Report/Environmental Impact Statement (EIR/EIS) for a proposed California High-Speed Train (HST) network linking the major metropolitan areas of the State of California and the HST system approved by CHSRA includes the Los Angeles to San Diego via Inland Empire corridor (referred to herein as the “Corridor”); and

WHEREAS, the authority and responsibility for the planning, construction, and operation of high-speed passenger train service at speeds exceeding 125 miles per hour in California is exclusively granted to CHSRA by Public Utilities Code Section 185032.a.2; and

WHEREAS, CHSRA has the authority to accept grants, fees, and allocations from the state, from political subdivisions of the state and from the federal government, foreign governments, and private sources (Public Utilities Code section 185034(4); and

WHEREAS, SANDAG adopted the 2007 Regional Transportation Plan (RTP) to identify the facilities, services and programs necessary to meet the San Diego County region’s travel needs through the year 2030, and that document recognizes the need for high-speed ground transportation to serve these needs; and

WHEREAS, SCAG adopted the 2008 RTP to identify the facilities, services and programs necessary to meet the SCAG’s region’s travel needs through the year 2035, and that document recognizes the need for high-speed ground transportation to serve these needs; and
WHEREAS, SANDAG completed the San Diego High-Speed Train Feasibility Studies for the potential extension to the International Border and High-Speed Commuter Rail Overlay in 2010, is considering pursuing a high-speed passenger train service between San Diego and facilities with forecast aviation capacity in neighboring regions including the international border. These services are not included as part of CHSRA’s preferred alignment but would be part of a Regional Air-Rail Network Study. Such a potential service could complement the statewide HST system and help to integrate it with other transit services, such as by providing a “feeder” service with potential multi-modal connections in the Corridor to the statewide system. CHSRA involvement in assessing continuing to assess the feasibility of these services will foster and facilitate coordination in design and planning, and review of potential environmental impacts for these different rail services; and

WHEREAS, SANDAG, SCAG, RCTC, and SANBAG are involved in the planning for, or operation of and/or considering pursuing commuter train services as well as HST service; and

WHEREAS, SANDAG and the SDCRAA are required by state law (Senate Bill 10 (2007)) to develop an Airport Multimodal Accessibility Plan (AMAP) and Regional Aviation Strategic Plan (RASP), by 2013 and 2011 respectively and the Regional Air-Rail Network Study will be Phase 1 of the Airport Multimodal Accessibility Plan and both studies were completed in 2011; and

WHEREAS, it is the intent and purpose of this MOU to demonstrate the continuing desire of the PARTIES to cooperate, to coordinate, and to share the results of their studies and to share their respective views on the subject of proposed improvements and enhancements to the Los Angeles to San Diego via Inland Empire HST Corridor in a manner which best enhances state and regional transportation networks, and in a manner which reduces or eliminates unnecessary duplicative efforts.

NOW, THEREFORE, it is mutually understood and agreed to by the PARTIES as follows:

1. The PARTIES intend to work together for Corridor improvement and to build upon the initial phases of work to complete planning and technical studies, and environmental review, for HST service in the Corridor, through the environmental documentation process, and specifically through the Record of Decision/Notice of Determination (NOD/ROD/NOD).

2. The PARTIES agree to form a project working group administered by the CHSRA to complete the necessary work related to the PROJECTS, including providing technical and policy input, reviewing deliverables and providing comments and approvals and providing technical support in a timely manner. The PARTIES agree that staff for each PARTY will cooperate fully in the exchange of information and will work together, under the oversight of CHSRA.

3. Unless otherwise agreed in writing as an amendment to this MOU, and authorized by competent authority, each PARTY shall bear any costs it incurs in relation to this MOU without expectation of reimbursement or subsidization by any other PARTY, subject to the following understanding:

(1) The CHSRA will be the lead agency and bear the cost of the preparation and adoption of the Los Angeles to San Diego via Inland Empire Region HST System Environmental/Engineering Work (including the cost of the public involvement program and project EIR/EIS documents and related technical studies for the Corridor defined in the CHSRA's certified Final Program EIR/EIS for the Proposed HST System).

(2) SANDAG will be the lead agency for the Regional Air-Rail Network Study AMAP and SDCRAA will be the lead agency for the RASP, the costs of which are set forth in Section VI of a previous and separate Memorandum of Agreement (MOA) between SANDAG and the SDCRAA dated June 2008 (“Airport MOA”). SDCRAA operates under revenue diversion parameters as set forth in Section VI (E) of the Airport MOA for plans and studies that provide for a dedicated connection
to airports under the control of the SDCRAA or whose proposed facilities are located on property
controlled by the SDCRAA. SDCRAA will only participate in planning or funding the studies with a
physical connection to airport facilities or a clear nexus to regional airport planning and directly
and substantially related to air transportation of passengers or property.

(3) The SDCRAA and SCAG will develop the regional aviation demand forecast, regional aviation
capacity analysis, and regional aviation facilities requirements tasks as such are related to the
Regional Air-Rail Network Study and will bear the proportional costs of these tasks.

(4) All PARTIES will have the option of requesting additional tasks related to the PROJECT and
each PARTY agrees to bear the costs of the additional work it has requested.

(5) If additional tasks are requested by more than one PARTY, those PARTIES agree to pay an
equal share of the costs of such additional work, unless they agree to a different allocation of
costs among or between them for such work.

4. CHSRA will take into account and coordinate with, to the extent it is appropriate to do so,
the other technical studies and proposed improvements which have been prepared, and will be prepared,
by other PARTIES or other agencies with reference to the Los Angeles to San Diego via Inland Empire
Corridor. CHSRA will be responsible for obtaining the necessary documents to do such tasks. Each other
PARTY hereto shall inform CHSRA of such studies and proposed improvements of which it has
knowledge during the term of this MOU.

5. The PARTIES recognize that realistic planning for the future of the Corridor requires
recognition of existing constraints along this Corridor and also requires recognition of the need for
cooperation and coordination among all of the interested agencies which have responsibilities to address
public transportation needs in and along that Corridor.

6. All PARTIES will participate and support CHSRA, as appropriate, in seeking federal and
state funding for HST studies and environmental and engineering work within the Corridor. All PARTIES
will provide technical and policy input and technical support, review and comment on documents in a
timely manner, and staff of each PARTY will actively work together with other PARTIES for Corridor
improvement.

7. Each PARTY agrees to encourage public awareness of and involvement in the
PROJECTS and decision processes concerning the Corridor in which the PARTIES, or any of them, are
engaged.

8. Each PARTY agrees that the primary purpose, intent and spirit of this MOU are to
continue and to expand cooperation and coordination among the PARTIES and to develop the framework
for future Cooperative Agreements. To this end, the PARTIES agree to share the results of their work,
including technical studies, and to confer at regular and frequent intervals.

9. Each PARTY intends to use the products of the technical studies as it determines is
appropriate, consistent with its respective authority and to the maximum extent possible.

10. Each PARTY to this MOU is responsible for making its own determination as to the
usefulness or as to the propriety of its use of or reliance upon the work product of any other PARTY to
this MOU. It is not intended by this MOU that any PARTY to this MOU represents or warrants that its work
product is sufficient for the purposes to which any other PARTY may wish to apply that work product. This
MOU does not reduce, expand, transfer, or alter in any way, any of the statutory or regulatory authorities
and responsibilities of any of the signatories.
11. It is noted that there may be differences in the nature of what CHSRA is studying and that which other PARTIES will be considering. This MOU does not constitute a decision by CHSRA or by its staff regarding the selection, timing, or phasing of one HST corridor or segment, or any part of such a segment, over another as part of the HST system defined in the certified Program EIR/EIS and approved by CHSRA. This MOU is not intended to constitute and does not constitute any limitation on the CHSRA’s decision making or that of any PARTY.

12. Each PARTY shall identify and inform each other PARTY of the name of and contact information for a technical lead person to exchange information between the PARTIES concerning the PROJECTS.

13. Each PARTY agrees to cooperate and coordinate with each other PARTY, its staff, contractors, consultants, and vendors, providing services required under this MOU to the extent practicable in the performance of the PROJECTS and in conjunction with each PARTY’s other respective responsibilities in the Corridor under this MOU.

14. The PARTIES agree to work diligently together and in good faith, using their best efforts to resolve any unforeseen issues and disputes arising out of the performance of this MOU.

15. This MOU may only be modified or amended in writing. All modifications, amendments, changes, and revisions of this MOU from time to time, in whole or in part, and from time to time, shall be binding upon the PARTIES, so long as the same shall be in writing and executed by each of the PARTIES.

16. This MOU shall be governed by and construed in accordance with applicable federal, state of California, and local laws. The PARTIES warrant that in the performance of this MOU, each shall comply with all applicable federal, state of California, and local laws, statutes and ordinances and all lawful orders, rules and regulations promulgated thereunder.

17. This MOU, including all exhibits and documents incorporated herein and made applicable by reference, constitutes the complete and exclusive statement of the term(s) and condition(s) of the MOU between the PARTIES and it supersedes all prior representations, understandings, and communications. The invalidity in whole or part of any term or condition of this MOU shall not affect the validity of other term(s) or condition(s).

18. Each PARTY shall be excused from performing its obligations under this MOU during the time and to the extent that it is prevented from performing by an unforeseeable cause beyond its control, including but not limited to: any relevant incidence of fire, flood or other emergency; acts of God; commandeering of material, products, plants or facilities by federal, state or local government; or a material act or omission by any PARTY, when satisfactory evidence of such cause is presented to the other PARTIES, and provided further such nonperformance is unforeseeable, beyond the PARTY’S control and is not due to the fault or negligence of the PARTY not performing, and does not impair the PARTY’S continued participation in the MOU. Additionally, each PARTY shall be excused from performing its obligations under this MOU during the time and to the extent that it is prevented from performing by reason of the lack of an adopted State Budget or the lack of sufficient appropriation in the adopted State Budget for work under this MOU, or the lack of sufficient appropriation of funds for the continuation of this MOU from a PARTY’S applicable funding agencies.

19. Any notice sent by first class mail, postage paid, to the addresses and addressees listed below shall be deemed to have been given when in the ordinary course it would be delivered. The representatives of the PARTIES who are primarily responsible for the administration of this MOU, and to whom notices, demands and communications shall be given are listed below:
California High-Speed Rail Authority
925 L Street, Suite 1425
Sacramento, CA 95814
Attention: Dan Leavitt, Deputy Director
770 L Street, Suite 800
Sacramento, CA 95814
Attention: Dan Leavitt, Deputy Director
(916) 324-1541, dleavitt@hsr.ca.gov

San Bernardino Associated Governments
1170 W. 3rd Street, 2nd Floor
San Bernardino, CA 92410-1715
Attention: Michael Bair, Mitch Alderman, Director of Transit/Rail Programs
(909) 884-8276, MALdermanmbair@sanbag.ca.gov

Southern California Association of Governments
818 W. Seventh Street, 12th Floor
Los Angeles, CA 90017
Attention: Naresh Amatya, Transportation Planning Manager
(213) 236-1800, amatya@scag.ca.gov

San Diego Association of Governments
401 B Street, Suite 800
San Diego, CA 92101
Attention: Linda Culp, Senior Transportation Principal Planner – Rail
(619) 699-6957, lcu@sandag.org

Riverside County Transportation Commission
4080 Lemon Street, 3rd Floor
Riverside, CA 92501
Attention: Sheldon Peterson, Rail Manager
(951) 787-7928, speterson@rctc.org

San Diego County Regional Airport Authority
P.O. Box 82776
San Diego, CA 92138-2776
Attention: Ted Anasis, Manager, Airport Planning
(619) 400-2400, tanasis@san.org

If any of the names and/or information listed above should change, the PARTY making such changes shall notify each other PARTY in writing of the changes within five (5) days of effective date of such changes.

20. This MOU may be executed in counterparts. This MOU shall be effective upon the date of full execution of this MOU by all the PARTIES. This MOU shall continue in full force and effect through December 31, 2011, through completion of the Environmental Documentation (to NOD/ROD/NOD) anticipated to occur on or about December 31, 2016, unless terminated earlier by mutual written consent of all the PARTIES. Any PARTY may withdraw from and terminate its participation in the MOU upon providing 30 days written notice to each other PARTY hereto, provided that the terminating PARTY shall bear the reasonable costs of terminating work it has requested under this MOU through the date of its
withdrawal from the MOU. The term of this MOU may only be extended upon mutual written agreement by the PARTIES.

IN WITNESS WHEREOF, the PARTIES hereto have caused this Memorandum of Understanding to be executed as to the date across from below their signatures.
SAN BERNARDINO ASSOCIATED GOVERNMENTS:

APPROVED AS TO FORM

LARRY MACALLONGARY C. OVITT
President

PENNY ALEXANDER-KELLY JEAN-RENE BASLE
SANBAG Counsel

Date
SOUTHERN CALIFORNIA ASSOCIATION OF GOVERNMENTS:

HASAN IKHRATA
Executive Director

JOANNA AFRICA
Acting Chief Counsel

Date
Draft SANDAG Comments on the California High-Speed Rail Program
Draft 2012 Business Plan

Overall Comments:

- SANDAG continues to participate in the state’s efforts to plan, design, and construct high-speed train (HST) service both statewide and specifically its connection to the San Diego region. As the second-busiest intercity rail corridor in the nation, investments in this key feeder route are potentially the most cost-effective of any area in the state of California.

- SANDAG will continue to work cooperatively with the California High-Speed Rail Authority (CHSRA) and our fellow regional transportation planning agencies along the Los Angeles to San Diego corridor to facilitate the advancement of the project-level Environmental Impact Report/Environmental Impact Statement (EIR/EIS) and eventual implementation.

- On October 28, 2011, the SANDAG Board of Directors approved the 2050 Regional Transportation Plan, which includes the state’s proposed HST connection in San Diego as one key alternative to solo driving and an important component to meeting the region’s future mobility needs.

Los Angeles to San Diego via Inland Empire HST Corridor:

- We are disappointed at the lack of information on Phase 2 corridors such as San Diego’s. While the Business Plan discusses the full 800-mile statewide system, there is no firm commitment to completing the Los Angeles to San Diego corridor or specific timeframe or cost estimate for completion once the Phase 1 segments are completed.

- In August 2011, corridor agencies such as SANDAG, were instrumental in restoring $4 million in funds through our local state delegations to continue the planning, preliminary engineering, and environmental work along this section of the corridor. We ask that the CHSRA continue to focus efforts on completing the next phase, the Supplemental Alternative Analysis report, by the original date of July 2012 using these funds.

Los Angeles-San Diego-San Luis Obispo (LOSSAN) Rail Corridor

- We agree with the CHSRA’s “blended” approach to sharing the LOSSAN corridor with existing rail services from Anaheim north to the San Fernando Valley. Linking HST service with existing passenger services will mean that all passenger rail services will be more attractive to both existing and new markets for rail. Capital and service improvements also can be made ahead of the 2033 Phase 1 HST service start date.

- Specifically, improvements such as track capacity increases, grade separations, corridor preservation, and station enhancements would show early success and a statewide commitment to a network of rail services. To this end, SANDAG staff has been working with CHRSA and rail owners and operators and regional planning agencies in the LOSSAN corridor to detail a plan for improvements. This staff group, the Southern California Passenger Rail Planning Coalition, formed specifically to enhance joint planning and operations and identify early investments in the corridor. We appreciate the CHSRA’s willingness to form and regularly participate in this coalition.
• The SANDAG Board of Directors has approved a $432 million program of improvements along the San Diego portion of the LOSSAN corridor, much of which is funded by the TransNet program. The ability to leverage the investments, not only in San Diego but in Orange and Los Angeles Counties, makes early investment success in the LOSSAN corridor a distinct possibility and one that can be shared with the CHSRA.

• Furthermore, because the high-speed link to San Diego is scheduled in a future phase, LOSSAN corridor improvements south of Anaheim would serve to improve service in the short-term and provide connectivity to the future high-speed rail system. We agree with the Business Plan statement that traveler benefits can be accelerated in Phase 2 areas such as the LOSSAN corridor through intercity or commuter rail services.
COMPASS CARD AND ALBERTSONS PARTNERSHIP

Introduction

The Compass Card program has transformed how San Diego County residents purchase and use transit passes. Since 2009, transit patrons have been using the Compass Card, a contactless smart card, for monthly and 30-day rolling passes. Since the launch in 2009, third-party retail outlets have sold approximately 60 percent of the region’s transit passes each month, thus delivering a rich network of third-party outlets for SANDAG, Metropolitan Transit System (MTS) and North County Transit District (NCTD).

VONS has been the exclusive grocery store outlet for Compass Cards since service first began in 2009, and the current contract is scheduled to expire December 31, 2011. Under that agreement, VONS had the exclusive concession for sales except in under-served areas where it did not currently have a grocery store. SANDAG and the transit operators entered into supplementary agreements with three other retail vendors to serve geographic areas not served by VONS. No changes to the agreements with these other retail vendors are currently planned. VONS and our other retail vendors have been important partners to SANDAG and the transit agencies. These retail vendors comprise approximately 60 percent of all pass sales. MTS and NCTD through their Transit Stores and ticket vending machines sell approximately 33 percent of total sales with web and telephone orders currently at around 7 percent of the total.

Earlier this year, SANDAG in conjunction with MTS and NCTD issued a request for proposals to solicit proposals from retail vendors to sell and reload Compass Cards beginning in January 2012. SANDAG received one proposal from Albertsons, a division of Supervalu, Inc., and after discussion with our existing vendor, brought the Albertsons proposal to NCTD, MTS, and SANDAG executive management for review and consideration.

Discussion

NCTD, MTS, and SANDAG conducted a joint negotiation with Albertsons in November 2011, and all parties have come to an understanding on contract terms and conditions. The proposed contract with Albertsons would be between SANDAG and Albertsons with the ability to assign the contract to either (or both) MTS and NCTD. The following are the key elements that are incorporated in the proposed contract language:

Recommendation

The Board of Directors is asked to approve an amendment to the FY 2012 Budget to increase the Compass Card work element budget by $95,977 to $1,925,416 to fund transition costs for the Albertsons partnership (Attachment 1).
• The proposed contract would have a three-year base and two 1-year options.

• Albertsons would be the exclusive grocery store outlet for Compass Card sales and reloads with the three existing SANDAG agreements with other third-party outlets remaining in force to ensure continued geographic coverage.

• Albertsons would sell and reload Compass Cards at its 42 locations throughout San Diego County from 7 a.m. to 7 p.m. every day.

• Albertsons would annually supply MTS, NCTD, and SANDAG an equivalent of nearly $190,000 worth of advertising in its weekly circular that reaches 900,000 homes in the region.

• SANDAG, MTS, and NCTD would provide affiliated marketing material to Albertsons including, but not limited to 100,000 Albertsons-logoed Compass Cards each year of the contract, bus and rail car signage, and prominent placement of the Albertsons logo on timetables, Fare Facts, rider guides, and regional transit maps.

Attachment 2 is a regional map depicting the current location of the other three retail vendors, transit agencies’ ticket vending machines and Transit Stores. The map also shows the locations for Albertsons.

Transition Plan

VONS will continue to sell and reload Compass Cards through January 5, 2012. Starting January 6, SANDAG, MTS, and NCTD will remove equipment from VONS, and prepare that equipment for installation the following week at the 42 Albertsons stores. Albertsons personnel will be trained on the use of the equipment the week of January 16 and go live on January 20, 2012.

Staff at MTS, NCTD, and SANDAG will begin marketing and outreach program that will first inform our customers of the pending end of the VONS partnership and direct patrons to our Web sites, ticket vending machines, and the Compass Call center during the interim period. The second wave will focus on the beginning of the Albertsons partnership and announce the “grand opening” scheduled for January 20.

The transition effort will be supported by all three agencies with personnel at MTS and NCTD involved in every aspect of the transition, including planning and execution. SANDAG has prepared a detailed cost estimate that primarily covers the time for SANDAG staff, who are not currently budgeted in the Compass Card work element in the FY 2012 Budget. A copy of the proposed FY 2012 Budget amendment, which would increase the Compass Card work element by $95,977, is included as Attachment 1. MTS and NCTD have reviewed and approved SANDAG cost numbers and have agreed to fund these activities through their fare revenue. NCTD and MTS will fund their personnel costs through their own ongoing operations.

GARY L. GALLEGOS
Executive Director

Attachment: 1. FY 2012 Budget Amendment: Work Element 33106.00
          2. Compass Card Outlets

Key Staff Contact: James Dreisbach-Towle, (619) 699-1914, jdr@sandag.org
WORK ELEMENT: 33106.00  Compass Card Program

FY 2012 BUDGET: $1,829,439 $1,925,416

AREA OF EMPHASIS: Smart Mobility Programs

Amendment #1 -- VONS to Albertsons Transition

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Note: Amendment #1 increase of $95,977 funded by verbal agreement from MTS and NCTD

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OBJECTIVE

The objective of this work element is to implement and support the Regional Fare Ordinance by offering monthly passes and other fare products on the Compass Card. The Compass Card program uses advanced technology to: (1) improve fare collection activities; (2) enhance data availability for ridership and product usage; and (3) introduce a common fare product for regional transit customers. The program emphasis in FY 2012 includes: (1) continuing deployment and utilization of the Compass Card program, including centralized and consolidated fare payment management for the region's transit operations; (2) overseeing the operations of the regional customer account management service center for Compass Card customers; and (3) furthering the effort to develop brand identity adoption of the Compass Card and recognition of the new card.
PREVIOUS ACCOMPLISHMENTS

During FY 2010 the Compass Card became the primary method of payment for transit fares in the region. Launched for public use as a replacement to paper passes in May 2009 and expanded through a broad distribution network, including retail providers and local businesses, the card has replaced all monthly paper passes. In early FY 2010, Internet functionality also was introduced and included the online account management feature for ordering, reloading, and managing Compass Card accounts as a means to reduce costs and improve service to customers.

Project Manager: Dreisbach-Towle, James
Committee(s): None
Working Group(s): None

PRODUCTS, TASKS, AND SCHEDULES

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<th>Task No.</th>
<th>% of Effort</th>
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| 1        | 35          | Task Description: Manage ongoing customer accounts.  
Product: Customer account records  
Completion Date: 6/30/2012 |
| 2        | 20          | Task Description: Manage the purchase and outlet distribution of compass cards and passes.  
Product: Ongoing  
Completion Date: 6/30/2012 |
| 3        | 25          | Task Description: Maintain ongoing services agreements for software maintenance, support services, and minor enhancements.  
Product: Consultant agreements  
Completion Date: 6/30/2012 |
| 4        | 20          | Task Description: Periodic application system management, including support of fare price and policy changes.  
Product: Change control documents  
Completion Date: 6/30/2012 |

FUTURE ACTIVITIES

Ongoing operation and enhancements to improve program management, reduce fraud, and comply with changes in the Regional Fare Policy.
QUALITY OF LIFE FUNDING STRATEGY: PUBLIC INFORMATION SURVEY RESULTS AND NEXT STEPS

Introduction

The Quality of Life Stakeholder Working Group (SWG) has been meeting regularly since January 2010. SANDAG asked this diverse group of regional stakeholders to consider and provide input to the SANDAG Quality of Life Steering Committee and Board of Directors on several matters, including:

- The regional significance and appropriateness of the four potential funding elements identified for the Quality of Life Funding Strategy (i.e., habitat conservation, shoreline preservation, water quality enhancement, and transit operations and maintenance);
- Development of criteria that would be useful in evaluating and prioritizing the funding needs of the four elements;
- Assessment of the programs considered for regional funding, and the amount of funding needed;
- Identification and evaluation of the range of feasible funding alternatives; and
- The appropriateness, timing, and viability of initiating a SANDAG quality of life funding measure.

On November 18, 2011, the Quality of Life Steering Committee reviewed the results from a survey of the public about its views of quality of life issues and funding measures, and has recommended that the deadline for acting on an additional funding measure be extended to no later than 2016.

Discussion

Meeting monthly, the SWG was able to deliver its initial feedback on its efforts at the beginning of 2011 to the Steering Committee, which is composed of SANDAG Board members from each of the six subregions. Feedback was summarized in a report produced by the SWG. A summary of this input also was provided to the Board of Directors at its annual summit in February 2011. A brief summary of that feedback follows:
The four elements identified by SANDAG for consideration in a Quality of Life Funding Strategy all meet the criteria for being underfunded, lacking a dedicated funding stream, and potentially benefiting from a regional funding approach. That feedback should not, however, be taken as an indication that other elements of regional quality of life might not also meet those criteria now or in the future.

Proposed evaluation criteria were developed by the SWG and applied to the programs identified as making up the funding needs for each quality of life element. The general theme of these criteria was to determine whether a proposed program could demonstrate that it would provide community benefits that were quantifiable through a sustainable approach that is currently unfunded and/or underfunded.

Generally, proposed programs all met the threshold, as defined by the criteria, for being appropriate to fund through a regional funding mechanism. However, while the relative order of magnitude of funding needed for each element was acknowledged, definitive funding projections were not defined. Also, while it was generally agreed that transit operations were underfunded, the SWG did not reach consensus on what should be funded and if funding the proposed 2050 Regional Transportation Plan and its Sustainable Communities Strategy network and operations plan would be the best use of additional funding for transit.

Several funding alternatives were identified as feasible from a legal sense, but when the SWG examined the practicality of implementation (e.g., the need to coordinate and pass certain measures at the municipal or even smaller scale) as well as the lower amounts of funding that most of these alternatives would produce in relation to the magnitude of need, a regional sales tax measure emerged as the most feasible funding alternative.

Prior to providing any additional feedback regarding a potential SANDAG funding measure, the SWG sought additional direction from the Steering Committee and information from a survey of the public about its views of quality of life issues and funding measures. After receiving that direction and results of the survey (Attachment 1), the SWG provided the input for Steering Committee and SANDAG Board consideration. The full survey results can be found on the SANDAG Web site at www.sandag.org/QofLsurvey.

It was determined from the survey that from a timing standpoint, there does not appear to be any possible scenario under current or foreseeable conditions in which a quality of life funding measure would pass the required two-thirds majority of San Diego County voters. It also was determined that among the four quality of life elements, water quality tended to garner the most public support. Based on that practical information, the SWG and Steering Committee feedback is that the Board of Directors should amend the TransNet Extension Ordinance to again extend the deadline for acting on “additional regional funding measures to meet long-term requirements for implementing habitat conservation plans in the San Diego region.”

What the survey did make apparent is that there is a tremendous education process that would be needed ahead of such a measure, as the purported benefits of the quality of life programs that would be funded did not immediately resonate with most survey respondents. Assuming a potential sales tax measure was deferred for several years, raising awareness of current and projected funding gaps would still be useful to inform officials in the region.
Finally, the meetings and discussions over the past 18 months conducted by the SWG and Steering Committee form a considerable body of analysis, feedback, and programmatic definition. While the programs and their costs discussed may be a “snapshot” in time, a summary of them will still be useful as a starting place for any future measure or regional dialogue on the subject. It also may be appropriate to refine some of the information that has been put together through the SWG process so that there is a viable list of potential projects and/or programs to choose from in developing a comprehensive initiative, should an opportunity arise. For example, while there are substantial planning documents to draw from for habitat conservation, shoreline preservation, and transit operations, water quality enhancement could benefit from a more directed effort to establish an effective regional plan of projects and programs.

The SWG members agreed that monthly meetings were no longer needed and provided potential options on how to proceed. One option would be to meet regularly but less often, perhaps on a quarterly schedule. Another option would be to meet on a “milestone” basis, for example, when and as often as there is meaningful work for the SWG to perform. Depending on the future “mission” of the SWG as defined by SANDAG, there also was consideration of whether the current membership should be reconsidered.

Next Steps

Pending Board action, staff will draft the amendments to the TransNet Extension Ordinance and schedule the first and second readings during 2012. Staff also will make revisions to the SWG charter and membership pursuant to Board direction.

GARY L. GALLEGOS
Executive Director

Attachment: 1. SANDAG 2011 Quality of Life Survey Topline Results

Key Staff Contact: Rob Rundle, (619) 699-6949, rru@sandag.org
Hello is _____ there? Hi this is _____ with Competitive Edge Research, a national polling firm and we’re calling the good folks of San Diego County to ask your opinion on local issues. We are not selling anything. Most people find it interesting and all your answers will be kept strictly confidential. Please let me begin by asking . . .

Q1. Do you think things in San Diego County are moving in the right direction or have they gotten off on the wrong track?

<table>
<thead>
<tr>
<th>Right Direction, strongly</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Right Direction, somewhat</td>
<td>6.6</td>
</tr>
<tr>
<td>Wrong Track, somewhat</td>
<td>23.9</td>
</tr>
<tr>
<td>Wrong Track, strongly</td>
<td>19.3</td>
</tr>
<tr>
<td>Mixed (Not read)</td>
<td>6.4</td>
</tr>
<tr>
<td>Unsure (Not read)</td>
<td>19.6</td>
</tr>
<tr>
<td>Refused (Not read)</td>
<td>0.5</td>
</tr>
<tr>
<td><strong>Net Direction</strong></td>
<td><strong>-12.7</strong></td>
</tr>
</tbody>
</table>

Q2. How would you rate the overall quality of life in San Diego County? Would you say it is . . . (Options were rotated)

<table>
<thead>
<tr>
<th>Excellent</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very good</td>
<td>15.6</td>
</tr>
<tr>
<td>Good</td>
<td>30.5</td>
</tr>
<tr>
<td>Only fair</td>
<td>35.1</td>
</tr>
<tr>
<td>Poor</td>
<td>13.7</td>
</tr>
<tr>
<td>Unsure (Not read)</td>
<td>3.8</td>
</tr>
<tr>
<td><strong>Unsure (Not read)</strong></td>
<td><strong>1.3</strong></td>
</tr>
</tbody>
</table>

Q3. Over the next three years, do you think the quality of life in San Diego County will . . . (Options were rotated)

<table>
<thead>
<tr>
<th>Improve a lot</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improve a little</td>
<td>6.0</td>
</tr>
<tr>
<td>Remain about the same</td>
<td>28.3</td>
</tr>
<tr>
<td>Worsen a little</td>
<td>35.7</td>
</tr>
<tr>
<td>Worsen a lot</td>
<td>18.4</td>
</tr>
<tr>
<td>Unsure (Not read)</td>
<td>6.1</td>
</tr>
<tr>
<td><strong>Unsure (Not read)</strong></td>
<td><strong>5.5</strong></td>
</tr>
</tbody>
</table>

I am going to read you some issues. Please tell me how much effort you think local governments in San Diego County should put into addressing each of them. (Q4-Q12 were randomized.)
<table>
<thead>
<tr>
<th>Q4. Protecting the natural environment</th>
<th>Large Amount %</th>
<th>Some %</th>
<th>Not Much %</th>
<th>None at All %</th>
<th>Unsure %</th>
<th>Ref %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q5. Increasing the availability of public transportation, such as buses, trolleys and trains</td>
<td>41.2</td>
<td>41.8</td>
<td>11.2</td>
<td>4.4</td>
<td>1.3</td>
<td>0.1</td>
</tr>
<tr>
<td>Q6. Conserving more wildlife habitat</td>
<td>39.7</td>
<td>37.1</td>
<td>12.7</td>
<td>9.0</td>
<td>1.5</td>
<td>0.0</td>
</tr>
<tr>
<td>Q7. Improving the water quality of rivers and lakes</td>
<td>40.2</td>
<td>44.5</td>
<td>9.4</td>
<td>3.6</td>
<td>2.0</td>
<td>0.3</td>
</tr>
<tr>
<td>Q8. Keeping beaches and ocean water clean</td>
<td>51.0</td>
<td>39.5</td>
<td>6.0</td>
<td>1.8</td>
<td>1.7</td>
<td>0.1</td>
</tr>
<tr>
<td>Q9. Reducing traffic congestion</td>
<td>42.4</td>
<td>43.4</td>
<td>9.7</td>
<td>3.3</td>
<td>1.1</td>
<td>0.1</td>
</tr>
<tr>
<td>Q10. Replenishing beach sand</td>
<td>16.7</td>
<td>47.9</td>
<td>17.8</td>
<td>12.8</td>
<td>4.7</td>
<td>0.1</td>
</tr>
<tr>
<td>Q11. Improving the local economy and jobs</td>
<td>74.2</td>
<td>17.6</td>
<td>4.1</td>
<td>3.0</td>
<td>0.9</td>
<td>0.1</td>
</tr>
<tr>
<td>Q12. Controlling finances and balancing its budgets</td>
<td>83.7</td>
<td>13.2</td>
<td>1.6</td>
<td>0.8</td>
<td>0.7</td>
<td>0.0</td>
</tr>
</tbody>
</table>

Please tell me whether you agree or disagree with the following statements. (Q13-Q14 were rotated)

Q13. I would not vote for a tax increase no matter what the money would be used for. | %
| Agree, strongly | 36.8 |
| Agree, somewhat | 7.6 |
| Disagree, somewhat | 29.5 |
| Disagree, strongly | 24.2 |
| Unsure (Not read) | 1.9 |

Q14. I trust local government agencies to spend the funds they get wisely. | %
| Agree, strongly | 10.1 |
| Agree, somewhat | 15.9 |
| Disagree, somewhat | 26.4 |
| Disagree, strongly | 44.6 |
| Unsure (Not read) | 3.0 |
| Refused (Not read) | 0.0 |

Q15. Would you rate the current employment situation in San Diego County as . . . (Options were rotated.) | %
| Excellent | 1.5 |
| Good | 11.3 |
| Only fair | 46.9 |
| Poor | 38.0 |
| Unsure (Not read) | 2.1 |
| Refused (Not read) | 0.2 |
Q16. I am now going to ask you about a San Diego County quality of life measure which may appear on the ballot in an upcoming election. It would read: To protect the public health and improve quality of life in San Diego County by protecting and preserving open space and natural habitat and by cleaning up polluted stormwater runoff, keeping toxic chemicals, bacteria, and trash out of San Diego rivers, lakes, beaches and the ocean, shall San Diego County enact a quarter-cent/increasing and improving public transportation services to relieve traffic congestion and improve air quality, shall San Diego County enact a half-cent sales tax with guaranteed independent annual audits and a citizens oversight committee which would expire after 20/40 years? If the election were held today would you vote “yes” to approve this measure or “no” to reject it?

<table>
<thead>
<tr>
<th></th>
<th>Water 20 years (n=288)</th>
<th>Water 40 years (n=288)</th>
<th>Transportation 20 years (n=290)</th>
<th>Transportation 40 years (n=341)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes, definitely</td>
<td>26.1</td>
<td>21.6</td>
<td>19.5</td>
<td>27.1</td>
</tr>
<tr>
<td>Yes, probably</td>
<td>24.1</td>
<td>29.0</td>
<td>30.1</td>
<td>17.0</td>
</tr>
<tr>
<td>No, probably</td>
<td>12.9</td>
<td>16.6</td>
<td>12.4</td>
<td>15.3</td>
</tr>
<tr>
<td>No, definitely</td>
<td>34.2</td>
<td>27.2</td>
<td>34.4</td>
<td>36.6</td>
</tr>
<tr>
<td>Unsure (Not read)</td>
<td>2.7</td>
<td>5.7</td>
<td>3.5</td>
<td>4.0</td>
</tr>
</tbody>
</table>

And I'll read you the provisions contained in this measure. Please tell me whether each is a good reason to vote for the measure or a good reason to vote against the measure. (Q17-Q23 were randomized.)

<table>
<thead>
<tr>
<th>Q17. The measure funds the protection and preservation of natural areas and wildlife habitat.</th>
<th>For, very good %</th>
<th>For, some good %</th>
<th>Against, some good %</th>
<th>Against, very good %</th>
<th>Uns %</th>
<th>Ref %</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>39.1</td>
<td>32.3</td>
<td>11.5</td>
<td>12.4</td>
<td>4.0</td>
<td>0.6</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Q18. The measure also funds putting sand on local beaches and keeping it there.</th>
<th>For, very good %</th>
<th>For, some good %</th>
<th>Against, some good %</th>
<th>Against, very good %</th>
<th>Uns %</th>
<th>Ref %</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>22.1</td>
<td>31.3</td>
<td>20.4</td>
<td>17.6</td>
<td>8.0</td>
<td>0.7</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Q19. The measure requires annual independently conducted audits.</th>
<th>For, very good %</th>
<th>For, some good %</th>
<th>Against, some good %</th>
<th>Against, very good %</th>
<th>Uns %</th>
<th>Ref %</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>44.3</td>
<td>26.9</td>
<td>10.4</td>
<td>11.6</td>
<td>6.2</td>
<td>0.7</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Q20. The measure requires oversight by a citizens committee.</th>
<th>For, very good %</th>
<th>For, some good %</th>
<th>Against, some good %</th>
<th>Against, very good %</th>
<th>Uns %</th>
<th>Ref %</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>34.5</td>
<td>33.7</td>
<td>10.6</td>
<td>11.9</td>
<td>8.7</td>
<td>0.6</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Q21w. The measure funds the clean-up of polluted stormwater runoff. (n=578)</th>
<th>For, very good %</th>
<th>For, some good %</th>
<th>Against, some good %</th>
<th>Against, very good %</th>
<th>Uns %</th>
<th>Ref %</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>44.4</td>
<td>35.1</td>
<td>8.5</td>
<td>8.2</td>
<td>3.7</td>
<td>0.0</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Q21t. The measure funds more and better public transportation services to relieve traffic congestion and improve air quality. (n=629)</th>
<th>For, very good %</th>
<th>For, some good %</th>
<th>Against, some good %</th>
<th>Against, very good %</th>
<th>Uns %</th>
<th>Ref %</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>45.7</td>
<td>26.5</td>
<td>11.4</td>
<td>12.6</td>
<td>3.2</td>
<td>0.5</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Q22w. The measure funds efforts to keep toxic chemicals, bacteria, and trash out of San Diego rivers, lakes, the ocean, and beaches. (n=578)</th>
<th>For, very good %</th>
<th>For, some good %</th>
<th>Against, some good %</th>
<th>Against, very good %</th>
<th>Uns %</th>
<th>Ref %</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>56.6</td>
<td>28.8</td>
<td>5.5</td>
<td>6.8</td>
<td>2.1</td>
<td>0.2</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Q22t. The measure also funds better public transportation services for seniors and disabled persons. (n=629)</th>
<th>For, very good %</th>
<th>For, some good %</th>
<th>Against, some good %</th>
<th>Against, very good %</th>
<th>Uns %</th>
<th>Ref %</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>48.0</td>
<td>29.0</td>
<td>7.7</td>
<td>9.9</td>
<td>4.3</td>
<td>1.1</td>
</tr>
</tbody>
</table>
For, very good  %  For, some good  %  Against, some good  %  Against, very good  %  Uns  %  Ref  %
Q23w. The measure increases the County’s sales tax by one-quarter cent. (n=578)  18.2  23.1  15.1  38.5  5.1  0.0
Q23t. The measure increases the County’s sales tax by one-half cent. (n=629)  18.5  19.0  16.1  41.9  4.3  0.2

Now I would like to read you some arguments you might hear both for and against the measure. I’ll start with arguments from supporters/opponents. Please tell me how convincing each is to you. (Supporter and opponent batteries were randomized.)

Supporter arguments were randomized.

Q24. Supporters say that this measure will improve the quality of life for San Diegans. It will fund necessary improvements to ensure that open space and natural habitat is preserved and that the quality of our water is ensured/improvements to public transportation are made. Is this argument to vote for the measure. . .

<table>
<thead>
<tr>
<th>Water (n=578) %</th>
<th>Transport (n=629) %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very convincing</td>
<td>32.8</td>
</tr>
<tr>
<td>Somewhat convincing</td>
<td>38.6</td>
</tr>
<tr>
<td>Not at all convincing</td>
<td>27.7</td>
</tr>
<tr>
<td>Unsure (Not read)</td>
<td>0.9</td>
</tr>
</tbody>
</table>

Q25. Supporters say that, by protecting San Diego’s natural beauty, this measure will help tourism remain a strong and healthy local industry. Each year visitors spend $7 billion and have a $16 billion impact on the County. This measure ensures that they keep coming back to our region while paying their fair share. Is this argument to vote for the measure . . .

<table>
<thead>
<tr>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very convincing</td>
</tr>
<tr>
<td>Somewhat convincing</td>
</tr>
<tr>
<td>Not at all convincing</td>
</tr>
<tr>
<td>Unsure (Not read)</td>
</tr>
</tbody>
</table>

Q26. Supporters say that this measure is really a small price to pay to improve our quality of life. The cost amounts to four dollars/eight dollars a month for the average local household. Is this argument to vote for the measure . . .

<table>
<thead>
<tr>
<th>Four (n=578) %</th>
<th>Eight (n=629) %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very convincing</td>
<td>24.4</td>
</tr>
<tr>
<td>Somewhat convincing</td>
<td>31.9</td>
</tr>
<tr>
<td>Not at all convincing</td>
<td>42.8</td>
</tr>
<tr>
<td>Unsure (Not read)</td>
<td>0.9</td>
</tr>
</tbody>
</table>
Q27. Supporters say that studies have shown that open space and natural habitat are disappearing from San Diego County at a rapid rate. This measure will address that issue and preserve open space for generations to come. Is this argument to vote for the measure . . .

<table>
<thead>
<tr>
<th></th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very convincing</td>
<td>30.9</td>
</tr>
<tr>
<td>Somewhat convincing</td>
<td>36.0</td>
</tr>
<tr>
<td>Not at all convincing</td>
<td>32.5</td>
</tr>
<tr>
<td>Unsure (Not read)</td>
<td>0.6</td>
</tr>
</tbody>
</table>

Q28. Supporters say that this measure makes good financial sense and it’s money that the politicians in Sacramento cannot take away. All the money raised by this measure will only be used on local projects and will help boost employment in San Diego County. Is this argument to vote for the measure . . .

<table>
<thead>
<tr>
<th></th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very convincing</td>
<td>32.2</td>
</tr>
<tr>
<td>Somewhat convincing</td>
<td>36.5</td>
</tr>
<tr>
<td>Not at all convincing</td>
<td>30.8</td>
</tr>
<tr>
<td>Unsure (Not read)</td>
<td>0.5</td>
</tr>
</tbody>
</table>

Q29. Supporters say improving our quality of life is proven to be a good way to improve property values. This measure will keep San Diego County an attractive place to live. Is this argument to vote for the measure . . .

<table>
<thead>
<tr>
<th></th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very convincing</td>
<td>26.5</td>
</tr>
<tr>
<td>Somewhat convincing</td>
<td>40.1</td>
</tr>
<tr>
<td>Not at all convincing</td>
<td>32.9</td>
</tr>
<tr>
<td>Unsure (Not read)</td>
<td>0.5</td>
</tr>
</tbody>
</table>

Q30. Supporters say that the measure will protect our economy and promote better paying jobs. By improving our quality of life, clean industries like biotech and telecommunications will locate and grow here in our region. Is this argument to vote for the measure . . .

<table>
<thead>
<tr>
<th></th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very convincing</td>
<td>24.5</td>
</tr>
<tr>
<td>Somewhat convincing</td>
<td>36.4</td>
</tr>
<tr>
<td>Not at all convincing</td>
<td>37.7</td>
</tr>
<tr>
<td>Unsure (Not read)</td>
<td>1.4</td>
</tr>
</tbody>
</table>

Q31. Supporters say this measure will restrict urban sprawl. Through the preservation of natural habitat, the measure will manage housing development and how we grow as a region. Is this argument to vote for the measure . . .

<table>
<thead>
<tr>
<th></th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very convincing</td>
<td>22.2</td>
</tr>
<tr>
<td>Somewhat convincing</td>
<td>39.0</td>
</tr>
<tr>
<td>Not at all convincing</td>
<td>37.7</td>
</tr>
<tr>
<td>Unsure (Not read)</td>
<td>1.1</td>
</tr>
</tbody>
</table>
Q32w. Supporters say that we should pass this measure to leave a good legacy to our children and grandchildren. We need to clean up and restore our lakes, rivers and beaches so that future generations can safely enjoy them. Is this argument to vote for the measure . . . (Of track w respondents, n=576)

<table>
<thead>
<tr>
<th></th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very convincing</td>
<td>36.3</td>
</tr>
<tr>
<td>Somewhat convincing</td>
<td>36.4</td>
</tr>
<tr>
<td>Not at all convincing</td>
<td>26.9</td>
</tr>
<tr>
<td>Unsure (Not read)</td>
<td>0.4</td>
</tr>
</tbody>
</table>

Q32t. Supporters say that we should pass this measure to leave a good legacy to our children and grandchildren. We need to clean up our air quality for the health of future generations. Is this argument to vote for the measure . . .

<table>
<thead>
<tr>
<th></th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very convincing</td>
<td>30.8</td>
</tr>
<tr>
<td>Somewhat convincing</td>
<td>34.7</td>
</tr>
<tr>
<td>Not at all convincing</td>
<td>34.5</td>
</tr>
</tbody>
</table>

Now I'll read you some arguments you might hear from supporters/opponents. Please tell me how convincing each is to you.

Opponent arguments were randomized.

Q33. Opponents say that working to improve quality of life is fine, but this is the wrong time to be asking residents for more funds. A sales tax increase places too much of a burden on working families. Is this argument to vote against the measure . . .

<table>
<thead>
<tr>
<th></th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very convincing</td>
<td>44.7</td>
</tr>
<tr>
<td>Somewhat convincing</td>
<td>30.8</td>
</tr>
<tr>
<td>Not at all convincing</td>
<td>24.1</td>
</tr>
<tr>
<td>Unsure (Not read)</td>
<td>0.5</td>
</tr>
</tbody>
</table>

Q34. Opponents say that the tax is too big and goes on too long. It will cost County taxpayers billions of dollars over 20/40 years and put a damper on our local economy. Is this argument to vote against the measure . . .

<table>
<thead>
<tr>
<th></th>
<th>Twenty (n=576)</th>
<th>Forty (n=631)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very convincing</td>
<td>36.3%</td>
<td>36.2%</td>
</tr>
<tr>
<td>Somewhat convincing</td>
<td>33.0%</td>
<td>34.0%</td>
</tr>
<tr>
<td>Not at all convincing</td>
<td>30.0%</td>
<td>29.0%</td>
</tr>
<tr>
<td>Unsure (Not read)</td>
<td>0.7%</td>
<td>0.8%</td>
</tr>
</tbody>
</table>
Q35. Opponents say there is no real accountability for how the funds from this tax are spent. There may be audits and an oversight committee, but the real decisions of how to spend the money will be made by unaccountable bureaucrats. Is this argument to vote against the measure . . .

<table>
<thead>
<tr>
<th></th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very convincing</td>
<td>40.5</td>
</tr>
<tr>
<td>Somewhat convincing</td>
<td>34.3</td>
</tr>
<tr>
<td>Not at all convincing</td>
<td>23.9</td>
</tr>
<tr>
<td>Unsure (Not read)</td>
<td>1.3</td>
</tr>
</tbody>
</table>

Q36. Opponents say that the tax is a waste of money. You can’t protect something like quality of life through a tax like this and there are more deserving issues. Is this argument to vote against the measure . . .

<table>
<thead>
<tr>
<th></th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very convincing</td>
<td>27.5</td>
</tr>
<tr>
<td>Somewhat convincing</td>
<td>35.7</td>
</tr>
<tr>
<td>Not at all convincing</td>
<td>36.1</td>
</tr>
<tr>
<td>Unsure (Not read)</td>
<td>0.6</td>
</tr>
</tbody>
</table>

Q37. Opponents say that this tax will just fund more government and make the bureaucracy bigger. We have extended and increased local sales taxes twice already. Enough is enough. Is this argument to vote against the measure . . .

<table>
<thead>
<tr>
<th></th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very convincing</td>
<td>43.7</td>
</tr>
<tr>
<td>Somewhat convincing</td>
<td>30.7</td>
</tr>
<tr>
<td>Not at all convincing</td>
<td>25.3</td>
</tr>
<tr>
<td>Unsure (Not read)</td>
<td>0.3</td>
</tr>
</tbody>
</table>

Some people change their minds after hearing more information so let me ask you again about a San Diego County quality of life measure.

Q38. It would read: To protect the public health and improve quality of life in San Diego County by protecting and preserving open space and natural habitat and by cleaning up polluted stormwater runoff, keeping toxic chemicals, bacteria, and trash out of San Diego rivers, lakes, beaches and the ocean, shall San Diego County enact a quarter-cent/(t) increasing and improving public transportation services to relieve traffic congestion and improve air quality, shall San Diego County enact a half-cent sales tax with guaranteed independent annual audits and a citizens oversight committee which would expire after 20/40 years? If the election were held today would you vote “yes” to approve this measure or “no” to reject it?

<table>
<thead>
<tr>
<th></th>
<th>Water 20 years (n=288) %</th>
<th>Water 40 years (n=288) %</th>
<th>Transportation 20 years (n=290) %</th>
<th>Transportation 40 years (n=341) %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes, definitely</td>
<td>27.2</td>
<td>21.9</td>
<td>23.5</td>
<td>23.9</td>
</tr>
<tr>
<td>Yes, probably</td>
<td>23.1</td>
<td>22.6</td>
<td>24.9</td>
<td>20.2</td>
</tr>
<tr>
<td>No, probably</td>
<td>11.2</td>
<td>15.9</td>
<td>10.7</td>
<td>14.1</td>
</tr>
<tr>
<td>No, definitely</td>
<td>34.0</td>
<td>31.8</td>
<td>36.3</td>
<td>38.9</td>
</tr>
<tr>
<td>Unsure (Not read)</td>
<td>4.4</td>
<td>7.8</td>
<td>4.6</td>
<td>2.9</td>
</tr>
</tbody>
</table>
Q39. There has been a suggestion to add another component to this quality of life measure. This measure would read: To protect the public health and improve quality of life in San Diego County by protecting and preserving open space and natural habitat and by cleaning up polluted stormwater runoff, keeping toxic chemicals, bacteria, and trash out of San Diego rivers, lakes, beaches and the ocean, shall San Diego County enact a quarter-cent increasing and improving public transportation services to relieve traffic congestion and improve air quality, shall San Diego County enact a half-cent sales tax with guaranteed independent annual audits and a citizens oversight committee which would expire after 40 years? If the election were held today would you vote “yes” to approve this measure or “no” to reject it?

<table>
<thead>
<tr>
<th>Option</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes, definitely</td>
<td>15.4</td>
</tr>
<tr>
<td>Yes, probably</td>
<td>17.5</td>
</tr>
<tr>
<td>No, probably</td>
<td>17.5</td>
</tr>
<tr>
<td>No, definitely</td>
<td>43.4</td>
</tr>
<tr>
<td>Unsure (Not read)</td>
<td>6.2</td>
</tr>
</tbody>
</table>

Thanks. Now I have just a few background questions to make sure we have a representative sample…

Q40. About how many times, if ever, have you visited the beaches in San Diego County in the last three years?

<table>
<thead>
<tr>
<th>Frequency</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>6.1</td>
</tr>
<tr>
<td>1-5 times</td>
<td>15.1</td>
</tr>
<tr>
<td>6-10 times</td>
<td>14.7</td>
</tr>
<tr>
<td>11-20 times</td>
<td>15.0</td>
</tr>
<tr>
<td>21-50 times</td>
<td>20.9</td>
</tr>
<tr>
<td>51-200 times</td>
<td>14.8</td>
</tr>
<tr>
<td>More than 200 times</td>
<td>9.6</td>
</tr>
<tr>
<td>Unsure</td>
<td>3.1</td>
</tr>
<tr>
<td>Refused</td>
<td>0.7</td>
</tr>
</tbody>
</table>

Q41. About how many times, if ever, have you hiked on trails, hunted or fished in San Diego County in the last three years?

<table>
<thead>
<tr>
<th>Frequency</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>28.8</td>
</tr>
<tr>
<td>1-5 times</td>
<td>21.9</td>
</tr>
<tr>
<td>6-10 times</td>
<td>11.3</td>
</tr>
<tr>
<td>11-20 times</td>
<td>12.0</td>
</tr>
<tr>
<td>21-50 times</td>
<td>12.5</td>
</tr>
<tr>
<td>More than 50 times</td>
<td>11.7</td>
</tr>
<tr>
<td>Unsure</td>
<td>1.2</td>
</tr>
<tr>
<td>Refused</td>
<td>0.7</td>
</tr>
</tbody>
</table>
Q42. About how many minutes is your usual daily commute to work or school, or do you not commute?

<table>
<thead>
<tr>
<th>Time</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>2.7</td>
</tr>
<tr>
<td>1-10 minutes</td>
<td>12.2</td>
</tr>
<tr>
<td>11-20 minutes</td>
<td>17.7</td>
</tr>
<tr>
<td>21-30 minutes</td>
<td>13.2</td>
</tr>
<tr>
<td>31-60 minutes</td>
<td>10.5</td>
</tr>
<tr>
<td>More than 60 minutes</td>
<td>3.9</td>
</tr>
<tr>
<td>Do not commute</td>
<td>38.2</td>
</tr>
<tr>
<td>Unsure</td>
<td>0.8</td>
</tr>
<tr>
<td>Refused</td>
<td>0.8</td>
</tr>
</tbody>
</table>

Q43. On average how many days per month, if any, do you take the bus, the train or the trolley?

<table>
<thead>
<tr>
<th>Days</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>78.4</td>
</tr>
<tr>
<td>1-2 days</td>
<td>8.7</td>
</tr>
<tr>
<td>3-5 days</td>
<td>3.7</td>
</tr>
<tr>
<td>6-20 days</td>
<td>4.1</td>
</tr>
<tr>
<td>More than 20 days</td>
<td>2.3</td>
</tr>
<tr>
<td>Unsure</td>
<td>1.8</td>
</tr>
<tr>
<td>Refused</td>
<td>1.0</td>
</tr>
</tbody>
</table>

Q44. When it comes to social issues and politics do you consider yourself to be . . .

<table>
<thead>
<tr>
<th>Political Belief</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very liberal</td>
<td>10.6</td>
</tr>
<tr>
<td>Somewhat liberal</td>
<td>30.2</td>
</tr>
<tr>
<td>Somewhat conservative</td>
<td>30.0</td>
</tr>
<tr>
<td>Very conservative</td>
<td>19.3</td>
</tr>
<tr>
<td>Somewhere in between (Not read)</td>
<td>6.7</td>
</tr>
<tr>
<td>Unsure (Not read)</td>
<td>1.4</td>
</tr>
<tr>
<td>Refused (Not read)</td>
<td>1.8</td>
</tr>
</tbody>
</table>

Q45. How many children, if any, under the age of 18 live in your home?

<table>
<thead>
<tr>
<th>Number</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>64.8</td>
</tr>
<tr>
<td>One</td>
<td>15.1</td>
</tr>
<tr>
<td>Two</td>
<td>12.0</td>
</tr>
<tr>
<td>Three</td>
<td>4.4</td>
</tr>
<tr>
<td>More than three</td>
<td>1.4</td>
</tr>
<tr>
<td>Refused (Not read)</td>
<td>2.4</td>
</tr>
</tbody>
</table>
Q46. Please stop me when I reach your general age category. Is it . . .

<table>
<thead>
<tr>
<th>Age Category</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>18 to 24</td>
<td>7.1</td>
</tr>
<tr>
<td>25 to 34</td>
<td>13.8</td>
</tr>
<tr>
<td>35 to 44</td>
<td>16.3</td>
</tr>
<tr>
<td>45 to 54</td>
<td>20.4</td>
</tr>
<tr>
<td>55 to 64</td>
<td>20.4</td>
</tr>
<tr>
<td>65 to 74</td>
<td>11.2</td>
</tr>
<tr>
<td>75 and over</td>
<td>10.7</td>
</tr>
<tr>
<td>Refused (Not read)</td>
<td>0.1</td>
</tr>
</tbody>
</table>

Q44. And were you born in . . .

<table>
<thead>
<tr>
<th>Location</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>California</td>
<td>42.7</td>
</tr>
<tr>
<td>Somewhere else in the United States</td>
<td>45.2</td>
</tr>
<tr>
<td>In another country</td>
<td>12.1</td>
</tr>
</tbody>
</table>

Q45. And please stop me when I reach the category closest to your household’s total annual income…

<table>
<thead>
<tr>
<th>Income Category</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than $20,000</td>
<td>8.2</td>
</tr>
<tr>
<td>$20 to 40,000</td>
<td>12.7</td>
</tr>
<tr>
<td>$40 to 60,000</td>
<td>16.1</td>
</tr>
<tr>
<td>$60 to 80,000</td>
<td>13.6</td>
</tr>
<tr>
<td>$80 to 100,000</td>
<td>11.0</td>
</tr>
<tr>
<td>$100,000 to $150,000</td>
<td>17.2</td>
</tr>
<tr>
<td>More than $150,000</td>
<td>10.1</td>
</tr>
<tr>
<td>Refused (Not read)</td>
<td>11.1</td>
</tr>
</tbody>
</table>

Thanks for your time and your opinion counts, goodbye.

Q46. GENDER (BY OBSERVATION)

<table>
<thead>
<tr>
<th>Gender</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>46.7</td>
</tr>
<tr>
<td>Female</td>
<td>53.3</td>
</tr>
</tbody>
</table>

Q50. PARTY (FROM SAMPLE)

<table>
<thead>
<tr>
<th>Party</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Republican</td>
<td>36.9</td>
</tr>
<tr>
<td>Democrat</td>
<td>36.6</td>
</tr>
<tr>
<td>Other</td>
<td>26.4</td>
</tr>
</tbody>
</table>

Q51. TURNOUT HISTORY (FROM SAMPLE)

<table>
<thead>
<tr>
<th>Turnout History</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unreliable/New</td>
<td>14.5</td>
</tr>
<tr>
<td>Reliable</td>
<td>47.8</td>
</tr>
<tr>
<td>Very Reliable</td>
<td>37.7</td>
</tr>
</tbody>
</table>
Q52. GEO BREAKS (FROM SAMPLE)

<table>
<thead>
<tr>
<th>Area</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>East County</td>
<td>17.1</td>
</tr>
<tr>
<td>Central</td>
<td>18.2</td>
</tr>
<tr>
<td>North City</td>
<td>27.8</td>
</tr>
<tr>
<td>North County East</td>
<td>2.5</td>
</tr>
<tr>
<td>North County West</td>
<td>23.7</td>
</tr>
<tr>
<td>South County</td>
<td>10.7</td>
</tr>
</tbody>
</table>

Q53. DATE OF REGISTRATION (FROM SAMPLE)

<table>
<thead>
<tr>
<th>Year Range</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006 to Present</td>
<td>44.7</td>
</tr>
<tr>
<td>2004 to 2005</td>
<td>10.7</td>
</tr>
<tr>
<td>2000 to 2003</td>
<td>16.2</td>
</tr>
<tr>
<td>1990 to 1999</td>
<td>18.0</td>
</tr>
<tr>
<td>Before 1990</td>
<td>10.4</td>
</tr>
</tbody>
</table>

Q54. PERMANENT VBM (FROM SAMPLE)

<table>
<thead>
<tr>
<th>Status</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>53.4</td>
</tr>
<tr>
<td>No</td>
<td>46.6</td>
</tr>
</tbody>
</table>
Proposed Amendments to Comprehensive Fare Ordinance

December 2011

Reason for Proposed Changes

• NCTD implemented COASTER/BREEZE/LIFT promotional fares on January 20, 2011

• NCTD desires to make these promo fares permanent based on positive revenue/ridership results
Promotional NCTD Changes

• BREEZE single ride cash fare:
  – Reduce from $2.00 to $1.75
  – Senior/Disabled/Medicare (S/D/M) from $1.00 to $0.75
• Reduce LIFT fare from $4.00 to $3.50

Promotional NCTD Changes

• COASTER:
  – Single ride fares decrease by $1.00 ($0.50 for S/D/M)
  – Regular Monthly Pass reduce 10-22%
  – Change 4-zone structure to 3-zones
Other Proposed Changes

• Changes related to promotional changes:
  – Reduce RegionPlus Day Pass to $12
  – Reduce discount for transfers to COASTER

• Other changes:
  – Add language to be consistent with FTA regulations and guidance
  – Rail 2 Rail

Title VI and CEQA

• Title VI:
  – No disparate impacts on minority or low-income riders

• California Environmental Quality Act:
  – Exempt from CEQA
Public Meetings

- NCTD – Thursday November 17 – 6-8pm
- SANDAG – Friday November 18 – 12-2pm
- No negative comments regarding proposed fare changes

Recommendation

The Board of Directors is asked to:

1. Hold the first reading of the proposed amendments to the Regional Comprehensive Fare Ordinance; and

2. Find that the proposed fare changes will not cause a disparate impact under the Title VI of the federal Civil Rights Act; and

3. Approve Resolution No 2012-12, which makes a finding that the proposed changes qualify for an exemption under the California Environmental Quality Act.
Amendment To The Southern California High-Speed Rail Inland Corridor Group MOU And Comments On The California High-Speed Rail Program Draft 2012 Business Plan

Board of Directors
December 9, 2011

Southern California Agency Coordination

[Logos of various agencies]
MOU Provisions

- Overall intent to continue and expand cooperation to advance HST corridor
- Major planning responsibilities by each agency
- Equitable funding strategy
- Changes will extend MOU through environmental phase (approximately 2016)
WHAT'S CHANGED?

• Phased implementation
• Blended operations
• Ridership and revenue projections
• Capital costs
• Schedule
• Funding

JOBS

• 100,000 jobs next five years for initial construction
• 1.2-1.4 million jobs over 20 years for Phase 1 construction
• 4,500 permanent operations jobs
• 100,000-450,000 new non-HSR permanent jobs by 2040
INITIAL CONSTRUCTION SECTION (ICS)

- 130 miles
- $6 billion
- 2012-2017

INITIAL OPERATING SECTION (IOS) SOUTH

- 300 miles
- $27.2 billion
- 2015-2021
**BAY TO BASIN**

- **IOS North:**
  - 290 miles
  - $21.1 billion
  - 2021-2026

- **Total Bay to Basin:**
  - $54.3 billion

**PHASE 1 BLENDED**

- “One-seat ride”
- $23.9 billion
- 2026-2030
PHASE 1 & PHASE 2

• To complete full Phase 1:
  • $19.9 billion
  • 2026-2033

THE PLAN

Phased development of program allows incremental investment decisions and service.

投资阶段

- 阶段1
  - 全部
  - $19.9 billion
  - 2026-2033

- 航空
  - IOS北
  - $21.1
  - IOS南
  - $27.2

- B2B
  - $54.3

- IOS(S)
  - $23.2

- ICS
  - $6.0
ALTERNATIVES

ADVANTAGE HSR

<table>
<thead>
<tr>
<th></th>
<th>$78 - 98 billion</th>
<th>$171 billion</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>HSR</td>
<td>Business as Usual</td>
</tr>
<tr>
<td>Cost</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Job creation - construction, permanent O&amp;M, indirect</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Private investment</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Reduced auto use</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Air quality improvement</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Transit-oriented development</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Feasibility</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Safety</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Reduced oil consumption</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Travel time savings</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Operations &amp; maintenance costs</td>
<td>✔</td>
<td></td>
</tr>
</tbody>
</table>
CONSERVATIVE ASSUMPTIONS

Construction
• 9-year schedule cushion
• $16 billion in contingencies
• $27.5 billion for inflation at 3% per year

Operations & Maintenance Costs
• Validated through comparisons to international systems

Ridership
• Gas at $3.80/gal
• LA-SF airfares constant at $95
• Reduced by 15% for planning

WHAT'S NEXT?
• 60-day public review and comment
• Legislature considers request for appropriation of $2.7 billion of Proposition 1A GO bonds for ICS as part of 2012-13 budget process
• Legislature appropriates Proposition 1A bonds for ICS in state budget
• Governor approves appropriation of Proposition 1A bonds for ICS in state budget
INFORMATION/COMMENTS

www.cahighspeedrail.ca.gov
“Draft 2012 Business Plan”
916-324-1541

Staff Comments

(1) Overall Comments
   a. Continued Participation
   b. Continued Collaboration
   c. Consistency with 2050 RTP
Staff Comments

(2) LA to San Diego Via Inland Empire Corridor

a. Lack of information and commitment in business plan to complete

b. Request Supplemental Alternatives Analysis be completed by July 2012

Staff Comments

(3) LOSSAN Corridor

a. Agree with “blended” approach

b. Support for San Diego conventional projects
   • Early success for Authority
   • Leverage existing TransNet program
   • Future feeder connection to HST in Anaheim
Compass Card and Albertsons Partnership

Third-Party Outlet

Compass Card – VONS

- Launched May 2009
- VONS exclusive grocery store outlet
- 2-year contract with options
- 55 stores in San Diego County
- $800K in total compensation
Compass Card Outlet Sales

- Third-Party Outlets 60%
- Web / Phone 7%
- Ticket Vending 22%
- Transit Stores 11%

Compass Card Outlet

- Issued Request for Proposals – Aug 2011
  - Diverse geographic coverage
  - Affiliated marketing opportunities
  - Direct or in-kind compensation
- One response
- Negotiate with Albertsons
Compass Card – Albertsons Partnership

- 3 year contract with options
- 8 month cancellation
- Exclusive grocery chain
  - 42 Stores
  - Existing third party agreements remain
- Hours of operations 7a.m. to 7p.m.
- $190K of in-kind advertising

Compass Card Outlets

- 42 Albertsons locations
  - 28 in MTS Service Area
  - 14 in NCTD Service Area
- 4 Agency Transit Stores
- 3 Other Outlet Agreements
- 200 + Ticket Vending Machines
- Web, Telephone, and Pass-by-Mail
The Board of Directors is asked to approve an amendment to the FY 2012 Budget to increase the Compass Card work element by $95,977 to $1,925,416 to fund transition costs for the Albertsons Partnership.
Competitive Edge Research & Communication, Inc.

Public opinion • Public policy • Organizations • Campaigns • Customer satisfaction

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Sasha Tobin: Research Manager, BA Government
Rachel Ward: Research Assistant, BA Political Science

SANDAG 2011 Quality of Life Measure Survey
Field Dates: May 31st – June 5th 2011
(San Diego County Active Voters, n=1,207)
Summary

Research Objectives: 1) Estimate current voter support for a "quality of life" measure
2) Determine optimum election scenario for the measure
3) Determine optimum mix of provisions

Sample Size: n=1,207
Margin of Sampling Error: ± 2.8%
Confidence Level: 95%
Sample Methodology: Simple Random Sampling from Listed Sample
Jurisdiction: San Diego County
Eligibility: Active Voters
Interview Method: Telephone
Average Total Duration: 16 Minutes, 31 Seconds
Field Dates: May 31st - June 5th, 2011
Field Facility: Competitive Edge Research, San Diego
Project Director: John Nienstedt, Sr.

Background
Voter Turnout

- 38% of the electorate is categorized as “very reliable”
  - Will vote in all elections including low turnout primaries
- Another 48% are labeled as “reliable”
  - May not vote in primaries
- 15% are unreliable
  - Only likely to vote in the highest turnout scenarios
- Low turnout elections include:
  - Far more seniors
  - More long-time registrants
  - More conservatives
  - More Republicans
  - A few more affluent voters
  - Fewer voters with children
  - Fewer foreign-born residents.

<table>
<thead>
<tr>
<th>County of San Diego</th>
<th>Unreliable/New</th>
<th>Reliable</th>
<th>Very Reliable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ideology</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Very liberal</td>
<td>7</td>
<td>14</td>
<td>9</td>
</tr>
<tr>
<td>Somewhat liberal</td>
<td>42</td>
<td>30</td>
<td>28</td>
</tr>
<tr>
<td>In between/Unsure</td>
<td>15</td>
<td>8</td>
<td>4</td>
</tr>
<tr>
<td>Somewhat conservative</td>
<td>25</td>
<td>31</td>
<td>32</td>
</tr>
<tr>
<td>Very conservative</td>
<td>11</td>
<td>17</td>
<td>27</td>
</tr>
<tr>
<td>Party</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Republican</td>
<td>21</td>
<td>35</td>
<td>45</td>
</tr>
<tr>
<td>Democrat</td>
<td>28</td>
<td>41</td>
<td>35</td>
</tr>
<tr>
<td>Non-Partisan/Other</td>
<td>51</td>
<td>24</td>
<td>20</td>
</tr>
<tr>
<td>Age</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>18-24</td>
<td>18</td>
<td>8</td>
<td>1</td>
</tr>
<tr>
<td>25-34</td>
<td>19</td>
<td>18</td>
<td>6</td>
</tr>
<tr>
<td>35-44</td>
<td>30</td>
<td>19</td>
<td>8</td>
</tr>
<tr>
<td>45-54</td>
<td>23</td>
<td>23</td>
<td>17</td>
</tr>
<tr>
<td>55-64</td>
<td>5</td>
<td>18</td>
<td>30</td>
</tr>
<tr>
<td>65-74</td>
<td>3</td>
<td>7</td>
<td>20</td>
</tr>
<tr>
<td>75+</td>
<td>2</td>
<td>7</td>
<td>18</td>
</tr>
</tbody>
</table>

SANDAG’s 6 Major Statistical Areas

- North city of San Diego (28%) -- Incomes tend to be higher; a bit more liberal and non-partisan; includes more California transplants; fewer Latinos
- North county west (24%) -- Quite conservative; heavily Republican; incomes are quite high; very reliable voters
- Central core (18%) -- Leans liberal; mostly Democrat; low turnout reliability; middle income; moderately Latino
- East county (17%) -- Lower incomes; few Latinos; heavily Republican
- South county (11%) -- Incomes notably lower; 8% of interviews were conducted in Spanish; easily the most Latino of all areas
- North county east (2.5%).
Civic Mood Remains Poor

- This environment is typically not conducive to building support for ballot measures that do not address the area’s most salient problems

San Diego County Quality of Life

- Despite the negativity, a large majority say quality of life is good or better
- Only 18% disagree and rate it as only fair or worse
  - High correlation between current perceptions and future predictions
- More think the area’s quality of life will get better than think it will get worse
- Quality of life is not a big problem for the electorate.
Issues

Employment Outlook is Fair to Poor

• The recession weighs heavily on voters’ minds
• In May 2011 the County’s official unemployment rate was 9.7%.

Current Employment Situation in San Diego County

- Poor - Unsure - Only Fair - Good - Excellent

- 38% Poor
- 47% Only Fair
- 11% Good
Trust in Local Government is Limited

- Only 26% trust local governments to spend their funds wisely and most of those voters do not strongly feel that way.
- Well over two-thirds distrust local government agencies with the public purse and most of that opinion is strong.
- No demographic group is immune to this distrust.

Electorate is Far from Being in a Pro-tax Mood

- It is basically shutting the door to any special tax measure.
- It is a bad sign for any tax measure requiring two-thirds support when 37% strongly agree with the statement: 
  - “I would not vote for a tax increase no matter what the money would be used for.”
- Another 8% somewhat agree with that statement.
- On the other side, pro-tax sentiment is much weaker than we have seen it.
Civic Finances Top the List of Local Issues

- A robust 84% want a large amount of effort going to “controlling finances”
- Economy is also a major focus; three-quarters want a large amount of attention paid to improving the dour employment outlook
- Beach and ocean water quality is a high priority for about half the voters
- Traffic congestion, water quality in rivers and lakes, protecting the environment, public transit, and conserving wildlife habitat are all middling concerns
- Replenishing beach sand does not attract widespread attention.

The “Basket” of Environmental Concerns

- A fairly distinct group of environmental issues exists: protecting the natural environment, conserving more wildlife habitat, improving water quality in rivers and lakes, and keeping beaches and ocean water clean
- We created a new variable to analyze this “basket” of environmental issues
- Only a tiny percentage want no effort expended on any environmental issues
- One-third want lots of effort on the entire basket
- A substantial contingent of pro-environment voters exists
- These folks tend to want government to take action on ANY issue
- They are more liberal, more Democratic, female, lower income, and younger
- But most voters lie between the two extremes, neither wanting the government to ignore all environmental issues nor wanting maximum effort.
Initial Results for Habitat-Plus Measures

- None of the versions of a quality of life sales tax measure that we tested currently approach the two-thirds support threshold.
- The two versions which focus on water quality and the 20-year tax that focuses on transportation are supported by about half the electorate.
- The 40-year transportation tax garners significantly less support.
- A combined measure produces 49% “yes,” 47% “no.”
Why?
1: Strong Environmental Concern not Widespread

- Too few voters express strong and consistent support for environmental action
- The measure wins handily among the “base” of pro-environment voters
- The County must have far more of them (71%) to get the measure to 2:1
- Those who want only limited effort strongly oppose the measure
- The measure’s real problem lies with the huge number of folks in the middle
- The measure does not connect with second tier environmental voters.

2: Anti-tax Sentiment is too Strong

- 62% of the anti-tax voters are definitely voting “no”
- Not close to even 50% support among voters expressing less firm opposition or who are unsure about tax increases
- The lone segment with a lot of firm "yes" votes is the strong pro-tax group
- Until tax increases are less vilified, this measure will not come close to passing.
3: Opposition from Conservatives Sinks Prospects

- Very conservative voters solidly oppose a habitat-plus measure and moderate conservatives are generally not buying it either
- Those in the middle are split on the measure
- Even somewhat liberal voters, though supportive, express some reservations
- Because the ideological balance in the county is unlikely to shift leftward soon, this habitat-plus measure is unlikely to pass at any time.

4: It Cannot Survive a Low Turnout Scenario

- Very reliable voters generally oppose the habitat-plus measure
- Unreliable voters support it by two-thirds
- Proponents must have the unreliable in the decision-making process.
5: Government Distrust Damages Chances

- The huge number of voters who strongly distrust government agencies to spend funds wisely generally oppose the habitat-plus measure.
- Opposition dissipates quickly as voters become more tentative in their distrust.
- However, voters must strongly trust the government in order for the measure to get past the two-thirds threshold.
- In other words, trusting “somewhat” is not enough.

Habitat + Measure by “I Trust Local Government Agencies to Spend Funds Wisely”

2 More Drivers

- 6: Support from Young Voters is Strong but not Enough
- 7: Long-time Voters are far more Skeptical.
Individual Ballot Measures

• 20-year Habitat + Water measure:
  – This version has a chance to become more attractive over time
  – Poor civic mood, trust in government, government finances and the poor local economy weigh it down
• 40-year Habitat + Water Measure:
  – The longer duration says to voters “this measure is really serious about these issues”
• 20-year Habitat + Transportation Measure:
  – The currently strong anti-tax sentiment sinks this measure
• 40-year Habitat + Transportation Measure:
  – Anti-tax sentiment, ideology and low trust-in-government keep this measure well below 50%
  – Attitudes toward transportation do not do much to drive opinions on the transportation measures.
Provisions

Water Safety is Measure’s Best Selling Point

- Appeals to all groups including those essential segments that are on the fence:
  - Voters who do not wholly favor government action on the environment
- Further, this provision is the only way to make headway with the anti-tax crowd.

<table>
<thead>
<tr>
<th>Provisions</th>
<th>For, very</th>
<th>For, some</th>
<th>Unsure</th>
<th>Against, some</th>
<th>Against, very</th>
<th>(n=578)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Funds efforts to keep chemicals out of San Diego water</td>
<td>19%</td>
<td>23%</td>
<td>33%</td>
<td>45%</td>
<td>45%</td>
<td></td>
</tr>
<tr>
<td>Funds the clean-up of polluted stormwater runoff</td>
<td>26%</td>
<td>35%</td>
<td>35%</td>
<td>15%</td>
<td>15%</td>
<td></td>
</tr>
<tr>
<td>Funds better public transportation services for seniors</td>
<td>30%</td>
<td>38%</td>
<td>32%</td>
<td>10%</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>Requires annual independently conducted audits</td>
<td>23%</td>
<td>40%</td>
<td>32%</td>
<td>7%</td>
<td>7%</td>
<td></td>
</tr>
<tr>
<td>Funds public transportation services to relieve traffic congestion</td>
<td>21%</td>
<td>46%</td>
<td>32%</td>
<td>7%</td>
<td>7%</td>
<td></td>
</tr>
<tr>
<td>Funds the protection and preservation of natural areas</td>
<td>22%</td>
<td>51%</td>
<td>27%</td>
<td>10%</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>Requires oversight by a citizens committee</td>
<td>27%</td>
<td>53%</td>
<td>20%</td>
<td>10%</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>Funds putting sand on local beaches</td>
<td>29%</td>
<td>50%</td>
<td>21%</td>
<td>9%</td>
<td>9%</td>
<td></td>
</tr>
<tr>
<td>Increases the County’s sales tax by one-quarter cent</td>
<td>31%</td>
<td>39%</td>
<td>29%</td>
<td>11%</td>
<td>11%</td>
<td></td>
</tr>
<tr>
<td>Increases the County’s sales tax by one-half cent</td>
<td>42%</td>
<td>39%</td>
<td>19%</td>
<td>10%</td>
<td>10%</td>
<td></td>
</tr>
</tbody>
</table>

*Habitat + Water Measure  †Habitat + Transportation Measure
Habitat + Water Provisions Continued

- Cleaning up polluted stormwater run-off is another provision that is perceived as a good reason to vote for the measure
  - A step behind the more concrete water safety provision, it resonates reasonably well with the important sub-groups proponents need
  - Also plays well with conservatives who earn less than $100,000
- The independent audits feature is another selling point for the measure
  - This provision helps blunt criticism from anti-tax voters
- It is telling that protecting wildlife habitat – the measure’s signature provision – generates only mild enthusiasm
  - It is only going to be a strong selling point for ardent environmentalists
  - Liberals, especially those under the age of 35, are ecstatic about it, but it is a significant negative for very conservative affluent voters
- The citizens oversight committee provision is another middling element; it will not hurt the measure’s prospects, but it will not help much either
- Beach sand replenishment is not a big positive; including it will not help it pass.

Habitat + Transit Provisions

- “Public transit for seniors and the disabled” edges out the more general “relieving traffic congestion”
  - Focusing on seniors and the disabled plays better with tax skeptics
- Funding more public transportation exposes yet another ideological fissure
  - Liberals love it, moderate conservatives tend to like it and very conservative voters, especially those who are very reliable, really dislike it.
Tax Amounts are Substantial Drags on Support

- Very conservative voters tend to think *either* sales tax rate is a good reason to vote “no”
- Moderate conservatives are not quite so opposed but nonetheless tend to see them as negatives
- Liberals hold their noses: they somewhat see both rates as good reasons to vote for the measures
- There is a small but significant difference in support levels between a half-cent tax and a quarter-cent tax
- The critical segment that desires substantial effort from government on most environmental issues *bails out on the measure when the tax increase moves to one-half cent.*

Messages
Only 4 Supporter Messages will Resonate

- The tourism-as-economic-driver argument is good
  - It makes more sense than any other argument for those who do not really embrace environmental issues
  - Its persuasiveness stretches way beyond the measure’s environmental base, making it very useful
- The "legacy message" -- that cleaning up and restoring bodies of water would be good for the next generation – is also well-received
- The basic argument that habitat preservation along with ensuring water quality will improve the quality of life plays moderately well
- The message that the tax money cannot be appropriated by Sacramento "politicians" is also serviceable
- The other six supporter arguments range from being innocuous to poor.

Opponents have Better Arguments

- Of the five opposition arguments we tested, three stand out as powerful:
  - That "enough is enough" when it comes to taxes
  - That unaccountable bureaucrats will be in charge of the money
  - That this is the wrong time for a tax
- These simple and straightforward arguments all successfully chip away at those important sub-groups proponents need
- The argument that the tax is too onerous and will hamper the economy is not quite as strong, but it also packs a punch
- The only opposition argument that falls flat is that quality of life cannot be protected via a tax.
Final Ballot Tests

Final Results of Habitat-Plus Measures

- In the end, after taking the respondents through a campaign scenario, none of the versions will approach the 67% threshold.
- In fact, support ebbs a bit, even from the low initial levels.
- The 20-year habitat + water version is the only one that makes it to 50%.

<table>
<thead>
<tr>
<th>Measure</th>
<th>No, definitely</th>
<th>No, probably</th>
<th>Unsure</th>
<th>Yes, probably</th>
<th>Yes, definitely</th>
</tr>
</thead>
<tbody>
<tr>
<td>Habitat + Water 20 years (n=288)</td>
<td>34%</td>
<td>11%</td>
<td></td>
<td>23%</td>
<td>27%</td>
</tr>
<tr>
<td>Habitat + Transportation 20 years (n=290)</td>
<td>36%</td>
<td>11%</td>
<td></td>
<td>25%</td>
<td>23%</td>
</tr>
<tr>
<td>Habitat + Water 40 years (n=288)</td>
<td>32%</td>
<td>16%</td>
<td></td>
<td>22%</td>
<td>22%</td>
</tr>
<tr>
<td>Habitat + Transportation 40 years (n=341)</td>
<td>39%</td>
<td>14%</td>
<td></td>
<td>20%</td>
<td>24%</td>
</tr>
<tr>
<td>Combined Measure</td>
<td>35%</td>
<td>13%</td>
<td></td>
<td>23%</td>
<td>24%</td>
</tr>
</tbody>
</table>
40-year Habitat + Water + Transportation Measure

- Adding a third component to the measure will not help

- The desire within the electorate to see environmental issues addressed remains much too weak to overcome the substantial opposition to tax increases.

Recommendations

- It’s not all about timing: this measure is a very tough sell even in good times
- Option A: Substantially re-write the measure:
  - Clean, safe water, especially inland, should be main feature
  - Tax should be ¼ cent
  - Can a jobs/economic development provision be added?
  - 20 years, not 40
- Option B: Without a rewrite, 2012 would be a suicide run
  - It probably won’t pass in 2016 either
  - But you could re-test it 2015
  - Avoid scandal, build credibility, and develop better messages in the meantime
- Must find a way to pick up conservative support
  - Communicating effectively with the segment requires a nuanced approach
  - Conservative messengers and media would be helpful.
Thank You!

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Rachel Ward: Research Assistant, BA Political Science
Item 7
Quality of Life Funding Strategy: Public Information Survey Results and Next Steps

Recommendation:
The Quality of Life Steering Committee recommends that the Board of Directors direct staff to return with a proposed amendment to the TransNet Extension Ordinance to extend the deadline for acting on an additional funding measure to no later than 2016 as well as related revisions to the Quality of Life Stakeholder Working Group charter as may be needed.