



Board of Directors Agenda

Friday, February 8, 2019
10 a.m. to 12 noon
SANDAG Board Room
401 B Street, 7th Floor
San Diego

Agenda Highlights

- **Second Reading of Proposed Amendments to the Regional Transit Comprehensive Fare Ordinance and *TransNet* Ordinance**
- **SANDAG Independent Performance Auditor**

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Message from the Clerk

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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.

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(619) 699-1900 · Fax (619) 699-1905 · sandag.org

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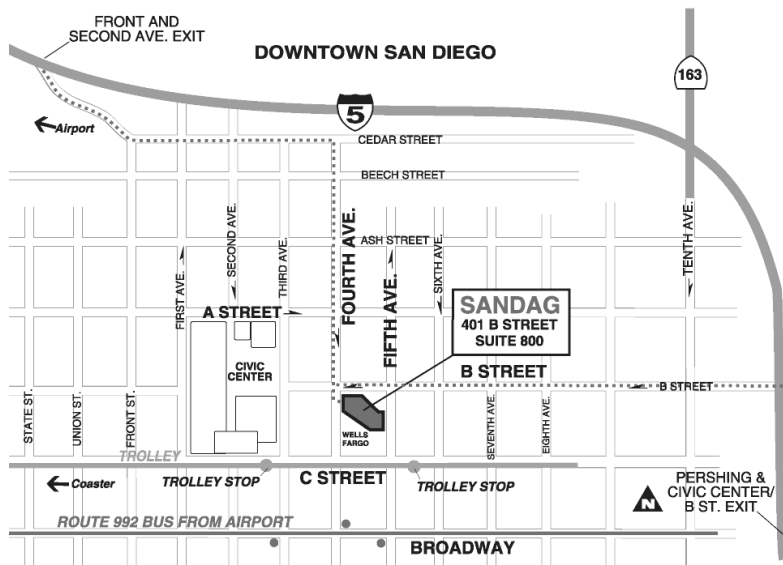
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Board of Directors

Friday, February 8, 2019

Item No.		Recommendation
1.	Public Comments/Communications/Member Comments 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.	

+2.	Executive Director's Report (Hasan Ikhata) The Executive Director will provide an update on key programs, projects, and agency initiatives.	Information
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Chair's Report

3.	San Diego Forward: The 2019-2050 Regional Plan An update on development of San Diego Forward: The 2019-2050 Regional Plan will be provided.	Information
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Reports

+4.	Second Reading of Proposed Amendments to the Regional Transit Comprehensive Fare Ordinance and <i>TransNet</i> Ordinance (Brian Lane)* The Board of Directors is asked to: (1) approve Resolution No. 2019-12 (Attachment 6), related to findings supporting a California Environmental Quality Act exemption for the proposed amendments to the Comprehensive Fare Ordinance; (2) conduct the second reading and approve amendments to the Regional Comprehensive Fare Ordinance, by reading the title of the Ordinance; and (3) acting as the San Diego County Regional Transportation Commission (RTC), conduct the second reading and approve amendments to RTC Ordinance No. RTC CO 2017 04 <u>CO-19-01</u> , related to fare changes, by reading the title of the Ordinance.	Second Readings / Approve
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- +5. **SANDAG Independent Performance Auditor (Vice Chair Catherine Blakespear; Councilmember Bill Baber, Audit Committee Vice Chair; Heather Renschler, Ralph Andersen & Associates)*** **Approve**

The Board of Directors is asked to:

- (1) discuss and approve the proposed salary, benefits, and other terms of employment for the Independent Performance Auditor position; and
- (2) authorize the Chair to execute an employment agreement with the candidate recommended by the Audit Committee and selected by the Board in closed session on January 11, 2019, including such terms.

- +6. **Closed Session: Conference with Legal Counsel – Significant Exposure to Litigation Pursuant to Government Code Section 54956.9 (D)(2) – One Potential Case (Amberlynn Griffin)**

The Board of Directors will be briefed on a written claim filed by Luis Quintero alleging damages in connection with use of the South Bay Expressway toll facility.

7. 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.

8. Upcoming Meetings

Information

The next Board Business meeting is scheduled for Friday, February 22, 2019, at 9 a.m.

9. Adjournment

+ next to an agenda item indicates an attachment

* next to an agenda item indicates that the Board of Directors also is acting as the San Diego County Regional Transportation Commission for that item

Executive Director's Report

Overview

The SANDAG team continues to make progress on important initiatives. Milestones over the last month include the opening of South Bay *Rapid*—a \$140 million transit project connecting the Otay Mesa Port of Entry with Downtown San Diego.

Action Requested: **Information**

The Executive Director will provide an update on key programs, projects, and agency initiatives.

Programs, Projects, and Agency Initiatives

- Construction crews opened another 1.5 miles of double tracked line along the coastal rail line in Encinitas on January 7, adding to the overall effort to double track the entire line in order to increase capacity and reduce travel times. Crews also successfully reconstructed the Chesterfield Drive rail crossing in Encinitas during a three-week closure that ended on January 23.
- The full length of the South Bay *Rapid* project was opened to the public with a community celebration in Chula Vista on Saturday, January 26, followed by the first day of full service the following Monday. The *Rapid* runs along dedicated guideway and carpool lanes from Otay Mesa, through the residential communities of eastern Chula Vista, to Downtown San Diego.

Meetings and Events

- Vice Chair Catherine Blakespear, San Diego Mayor Kevin Faulconer, and I traveled to Washington D.C. to meet with Representatives Scott Peters and Susan Davis, as well as high level Navy personnel, to discuss ideas for enhancing airport connectivity, as well as give them updates on the Regional Plan and Mid-Coast Trolley project.
- I gave a presentation to the League of California Cities and the Building Industry Association. I also had the opportunity to meet with many community leaders and stakeholders, including: Mark Cafferty, President and CEO of the San Diego County Economic Development Corporation; Chris Kehoe, Commissioner, California Transportation Commission; Jerry Sanders, CEO of the San Diego Regional Chamber of Commerce; Dan McCallister, San Diego County Treasurer-Tax Collector; Kim Becker, CEO of the San Diego County Regional Airport Authority; Matthew Tucker, Executive Director of the North County Transit District; Kris Michell, Chief Operating Officer, City of San Diego; Dr. Adela de la Torre, President of San Diego State University; and April Boling, Chair of the San Diego County Regional Airport Authority.
- The Airport Connectivity Subcommittee, established by the Board of Directors last month to choose the best plan to create an international transportation hub for San Diego International Airport transit and ground access, will meet for the second time on Tuesday, February 5.

Hasan Ikhata, Executive Director

Key Staff Contact: David Hicks, (619) 699-6939, david.hicks@sandag.org



Second Reading of Proposed Amendments to the Regional Transit Comprehensive Fare Ordinance and TransNet Ordinance

Overview

SANDAG Board Policy No. 029: [Regional Fare Policy and Comprehensive Fare Ordinance](#), provides guidelines for setting a uniform, fair, and equitable region-wide fare system within the County of San Diego for the Metropolitan Transit System (MTS) and North County Transit District (NCTD). The Comprehensive Fare Ordinance includes the existing fare structure used by MTS and NCTD, with a detailed listing of the available fares, their prices, and their limitations.

Over the past two years, SANDAG has been working with MTS and NCTD to consider various ways to simplify the transit fare system and help fare revenues keep pace with rising operational costs while minimizing impacts to ridership. The proposed changes are intended to address both of these issues.

In order to implement fare changes, SANDAG is required to amend the Comprehensive Fare Ordinance and TransNet Ordinance. Changes to the Fare Ordinance resulting in fare increases were last made in 2009.

Key Considerations

In December 2018, the MTS Board of Directors and NCTD Board of Directors recommended the fare changes outlined in Attachment 1, which include:

- Introduction of a combined Youth and Senior/Disabled/Medicare Regional Day Pass at \$3
- Increasing the age limit from 60 to 65 years for the senior discount across all fare types (seniors 60 or older prior to the effective date will remain eligible for reduced fares)
- Increased discounts to youth monthly passes (would equal a price reduction from \$36 to \$23 for Regional, \$50 to \$32 for Premium Regional, and \$82.50 to \$58 for COASTER)
- Decreased discounts to Senior/Disabled/Medicare monthly passes (would equal a price increase from \$18 to \$23 for Regional, \$25 to \$32 for Premium Regional, and \$41.25 to \$58 for COASTER)
- Changes to numerous MTS- and NCTD-specific one-way fares and monthly pass prices into simplified Regional Fares

Action Requested: Conduct Second Readings, Approve

The Board of Directors is asked to:

- (1) approve Resolution No. 2019-12 (Attachment 6), related to findings supporting a California Environmental Quality Act exemption for the proposed amendments to the Comprehensive Fare Ordinance;
- (2) conduct the second reading and approve amendments to the Regional Comprehensive Fare Ordinance, by reading the title of the Ordinance; and
- (3) acting as the San Diego County Regional Transportation Commission (RTC), conduct the second reading and approve ~~amendments to~~ RTC Ordinance No. ~~RTC-CO-2017-04~~CO-19-01, related to fare changes, by reading the title of the Ordinance.

Fiscal Impact:

The recommended fare changes are estimated to result in an annual passenger revenue increase of approximately \$7.6 million and would assist in maintaining high levels of service and help keep pace with rising operating costs to ensure that farebox recovery ratios are kept above legislated minimum levels.

Schedule/Scope Impact:

Any fare changes approved by the MTS, NCTD, and SANDAG Boards would be enacted no sooner than March 10, 2019.

- For improved simplification of the fare structure, removal of certain passes including the separate SPRINTER/BREEZE monthly pass, Trolley transfers, and multi-day passes

The recommended changes require amendments to the Comprehensive Fare Ordinance and *TransNet* Ordinance, which are outlined in Attachments 2 and 3. The *TransNet* amendments are the result of the proposed changes to the senior age limit and the Senior/Disabled/Medicare monthly pass discount.

Public Engagement and Feedback

Six public open-house meetings and 17 pop-up events were conducted in October 2018 for input on the fare changes. Attachment 4 includes a full description of the public outreach conducted and a complete list of the comments received to date. In general, the Senior/Disabled/Medicare monthly pass holders and paratransit riders expressed concern with the increases, while youth and their families generally were pleased with the proposed discount. There was some understanding that it has been nearly ten years since fares were increased, so many of the increases were considered reasonable.

The Transportation Committee and Independent Taxpayer Oversight Committee (ITOC) reviewed the amendments in January 2019 and recommend that the Board of Directors approve them; however, the ITOC asked that NCTD revisit the transfer fee for paratransit. The Board of Directors conducted the first reading of the proposed amendments at its January 25, 2019, meeting. While the Board members generally showed support for the fare changes, there were some concern expressed regarding equity for low-income riders, with a few requests to evaluate fare increases more often to avoid larger increases.

In response to public comments, the originally proposed Senior/Disabled/Medicare monthly pass price increase was lowered from \$26, to the currently proposed \$23. Additionally, NCTD decreased the proposed paratransit fare for those riders that would have had an equivalent transfer on a fixed route. Instead of a potential \$10 or \$15 one-way fare, the fare will be capped at \$5.

Equity Analysis

Pursuant to Title VI of the Civil Rights Act, SANDAG is required to conduct a fare equity analysis to evaluate the effects of fare changes on low-income and minority populations. Attachment 5 includes the analysis of fare changes and shows that there are no disparate impacts to minority riders and no disproportionate burdens to low-income riders.

California Environmental Quality Act Compliance

The California Environmental Quality Act (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.

In order to establish a basis for this CEQA exemption, the Board of Directors is asked to make a finding that the fare ordinance modifications set forth in the proposed Ordinance amendment are calculated to provide MTS and NCTD the ability to revise fares for purposes of simplification of the regional fare structure, to clarify the fare rules for the region, and to increase revenue to bridge funding shortfalls and/or improve farebox recovery ratio levels mandated by state statute as set forth in Resolution No. 2019-12 (Attachment 6).

Next Steps

Pending final approval by the SANDAG Board of Directors, the fare changes would be enacted on March 10, 2019.

Hasan Ikhata, Executive Director

Key Staff Contact: Brian Lane, (619) 699-7331, brian.lane@sandag.org

- Attachments:
1. Overview of Proposed Fare Changes
 2. Proposed Changes to the Comprehensive Fare Ordinance
 3. Proposed Amendments to the *TransNet* Extension Ordinance
 4. Public Engagement and Feedback
 5. Title VI Fare Equity Analysis
 6. Resolution No. 2019-12

Overview of Proposed Fare Changes

Single Ride

- MTS Bus
 - Adult and Youth would increase from \$2.25 to \$2.50
 - Senior/Disabled/Medicare would increase from \$1.10 to \$1.25
- MTS Rural
 - Adult and Youth Rural two-zone currently (\$5-\$10), would blend to an \$8 flat fare
 - Senior/Disabled/Medicare two-zone currently (\$2.50-\$5), would blend to a \$4 flat fare
- NCTD BREEZE
 - Would increase from \$1.75 to \$2.50 for Adult/Youth, and from \$0.75 to \$1.25 for Senior/Disabled/Medicare, in parallel with MTS
- NCTD SPRINTER
 - Would increase from \$2.00 to \$2.50 for Adult/Youth, and from \$1.00 to \$1.25 for Senior/Disabled/Medicare, in parallel with MTS
- NCTD COASTER
 - Zone 1 would increase for Adult from \$4 to \$5, Senior/Disabled/Medicare would increase from \$2 to \$2.50, Youth would decrease from \$4 to \$2.50
 - Zone 2 would increase for Adult from \$5 to \$5.75, Senior/Disabled/Medicare would increase from \$2.50 to \$2.75, Youth would decrease from \$5 to \$2.75
 - Zone 3 would increase for Adult from \$5.50 to \$6.50, Senior/Disabled/Medicare would increase from \$2.75 to \$3.25, Youth would decrease from \$5.50 to \$3.25
- MTS Access
 - Would increase from \$4.50 to \$5
- NCTD LIFT
 - Would increase from \$3.50 to \$5

Day and Monthly Passes

- Regional 1-Day Pass (Modes: MTS Bus, Trolley, *Rapid*, NCTD BREEZE, NCTD SPRINTER)
 - Adult 1-Day Pass would increase from \$5 to \$6
 - **NEW: Introduction of Senior/Disabled/Medicare and Youth 1-Day Pass at \$3**
- Regional 30-Day/Monthly Pass (Modes: MTS Bus, Trolley, *Rapid*, NCTD BREEZE, NCTD SPRINTER)
 - Adult would remain at \$72
 - Senior/Disabled/Medicare would increase from \$18 to \$23
 - Youth would decrease from \$36 to \$23

- Premium Regional 1-Day Pass (Includes Regional Pass Modes, MTS *Rapid Express*, and NCTD FLEX, except FLEX 372)
 - Adult 1-Day would remain at \$12 (but now exclude COASTER)
 - **NEW: Introduction of Senior/Disabled/Medicare and Youth Premium Regional 1-Day Pass at \$6**

- Premium Regional 30-Day/Monthly Pass (Includes Regional Pass Modes, MTS *Rapid Express*, MTS Rural, and NCTD FLEX, except FLEX 372)
 - Adult would remain at \$100
 - Senior/Disabled/Medicare would increase from \$25 to \$32
 - Youth would decrease from \$50 to \$32
 - **NEW: MTS Rural service added to this pass**

- NCTD COASTER Regional 1-Day Pass (Includes Regional and Premium Regional Pass Modes + all COASTER zones)
 - **NEW: Introduction of Adult 1-Day Pass at \$15**
 - **NEW: Introduction of Senior/Disabled/Medicare and Youth 1-Day Pass at \$7.50**

- NCTD COASTER Regional 30-Day/Monthly Pass (Includes Regional and Premium Regional Pass Modes + all COASTER zones)
 - Adult 1 Zone would increase from \$120 to \$140
 - Adult 2 Zone would increase from \$150 to \$161
 - Adult 3 Zone would increase from \$165 to \$182
 - Senior/Disabled/Medicare would increase from \$41.25 to \$58
 - Youth would decrease from \$82.50 to \$58

Simplification

- Elimination of 2, 3, 4, and 14-day passes
- Elimination of Trolley-to-Trolley one-way cash transfers to align with bus policy
- Elimination of \$2.25 SPRINTER/BREEZE Senior/Disabled/Medicare 1-Day Pass (Will now be \$3 to include service on the MTS bus and Trolley)
- Elimination of \$59 SPRINTER/BREEZE 30-Day/Monthly Pass (Will now be \$72 to include service on the MTS bus and Trolley)

Other Policy Changes

- Increasing the minimum age for senior discounts from 60 to 65 years (seniors 60 or older prior to the effective date will remain eligible for reduced fares)

**SAN DIEGO ASSOCIATION OF GOVERNMENTS
COMPREHENSIVE FARE ORDINANCE**

**An Ordinance Establishing a Regional
Fare Pricing Schedule ~~and 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 Americans with Disabilities Act (ADA) service operated by the Metropolitan Transit System (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 origin-to-destination transportation services provided to persons who qualify as eligible for such services under the guidelines of the ADA.
- 2.4 BREEZE:** North County Transit District (NCTD) fixed-route bus service brand name.
- 2.5 Bus:** Rubber-tired transit vehicles operated by MTS and NCTD.
- 2.6 Cash Fare:** Term used to describe fares purchased with United States currency.
- 2.7 Child:** Any person five years of age or under.
- 2.8 COASTER:** The brand name of the commuter rail service operated by NCTD in the coastal corridor from Oceanside to San Diego.
- 2.9 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.
- 2.10 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.
- 2.11 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, post-secondary passes, single-day and 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.

2.12 Compass Cash: The marketing name for the Stored Value product.

2.13 Compass Cloud: Marketing name for Mobile Ticketing application to purchase select fare types.

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

2.132.15 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.~~

~~—~~ FLEX: The brand name of the on-demand, deviated fixed-route, and point-deviated fixed-route service operated by NCTD.

2.142.16 LIFT: The complementary ADA service operated by NCTD.

2.152.17 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.

2.162.18 Medicare Recipient: Any person to whom the federal government has issued a Medicare identification card, regardless of age.

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

2.20 Mobile Ticketing: A mobile phone application allowing for the purchase of many of the fares available.

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

2.192.22 MTS: The San Diego 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 Rapid, MTS Rapid Express, MTS Trolley service, and ADA Access Service.

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

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

~~2.22 OCTA: Orange County Transportation Authority.~~

2.232.25 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). 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 a Medicare card or DMV placard ID receipt. In order to qualify for ADA paratransit service the person with a disability must be ADA certified.

2.242.26 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.

2.252.27 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.

2.262.28 Rapid: MTS brand name for a premium rapid transit service operated wholly or partly on exclusive bus lanes, guideways, Managed Lanes, or use of other transit priority measures. Depending on specific route characteristics, individual Rapid routes may be classified as MTS Rapid or MTS Rapid Express for purposes of Table 2.

2.272.29 Regional Fare System: The Regional Fare System is governed by SANDAG Board Policy No. 018: Transit Service Policies, Board Policy No. 029: Regional Fare Policy and Comprehensive Fare Ordinance, this Ordinance, MTS and NCTD transit operations ordinances and policies, and any other fare agreements, including agreements entered into by SANDAG with transit operators.

2.282.30 Regular Fare: Applies to all persons age six and older, except persons eligible for Senior, Disabled, and Medicare (S/D/M) or Youth fares.

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

2.302.32 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.

2.312.33 Service Day: ~~4 a.m. until 3:59 a.m. on the subsequent day~~ From the start time of the first trip through the end of the last trip in public timetables.

2.322.34 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.

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

2.342.36 Station: A light rail, Bus Rapid Transit or commuter rail passenger stop.

2.352.37 Stored Value: ~~C~~ash value placed on Compass Cards that can be debited to purchase fare products or pay a Cash Fare ~~on a Compass Card~~.

2.362.38 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.

2.372.39 Sworn Peace Officers: San Diego County, state, and federal sworn peace officers. Sworn peace officers include but are not limited to all municipal police department officials, all County Sheriff Department deputies, County Marshals, all County of San Diego Probation Officers, State Highway Patrol officers, State Police, U.S. Marshals, Federal Bureau of Investigation Officers, the MTS Chief of Police, and U.S. Immigration and Customs officers.

2.382.40 Tap: The act of touching a Compass Card on a validator to validate trips or deduct fares from Stored Value.

2.392.41 Transit Service Types:

2.3942.1 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).

2.3942.2 Corridor – A frequent transit service with limited stops including but not limited to major transit centers, residential centers, and activity centers that have more than six stops outside Centre City. Corridor services include MTS Trolley, MTS Rapid, SPRINTER, 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.

2.3942.3 Rapid 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.

2.3942.4 Commuter Rail – The commuter rail service operated in the coastal corridor from Oceanside to San Diego by NCTD under the brand COASTER.

2.3942.5 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. Rural service includes MTS Rural and NCTD FLEX.

2.402.42 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.

2.412.43 Transfer Slip: A document that may be issued by a driver to enable a passenger to board another transit vehicle free of charge— ~~typically during a service disruption. Only customers that paid a cash one-way fare are eligible to receive a transfer slip. Transfer slips are only valid in the NCTD service area on BREEZE routes 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.

2.422.44 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.

2.432.45 Trolley: Light-rail transit service operated by MTS.

2.442.46 TVM: Ticket Vending Machine used for the sale of single and multi-trip fare products, to check value left on Compass Card, and as a validator for MTS services.

2.452.47 Universal Pass: Provides unlimited rides on select transit services for an agreed upon period of time to individuals associated with a sponsoring entity, where the sponsoring entity guarantees universal participation/purchase by its employees, students, or other membership.

~~**2.46 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.~~

2.472.48 Validator: A device for tapping a Compass Card in order to validate the fare product or to deduct Stored Value. 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.~~

2.482.49 Youth: A person as defined in the *TransNet* Ordinance Section 4(C)(3).

2.492.50 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 ~~35. 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 only~~ be used on ~~COASTER, ADA, Rapid Express and Rural bus services~~ MTS Bus and Trolley, and NCTD BREEZE and SPRINTER ~~without paying an Upgrade or Supplement.~~
- 3.1.3** Premium Regional fare ~~products (Rapid Express, COASTER, and RegionPlus)~~ may only be used on ~~Local, Corridor~~ all services listed above, as well as, Rapid Express, and single zone certain FLEX routes (listed in the NCTD Riders Guide), and Rural services. ~~Regional fare products may be used with the Supplements indicated in Table 1.~~
- 3.1.4** COASTER ~~Regional and RegionPlus~~ fare ~~products~~ may be used on all transit services operated by MTS and NCTD ~~except LIFT, Access, and certain FLEX routes (as listed in the NCTD Riders Guide), 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~~ through 4 list transit fares available to the general public. The tables show the fare for each type of service by passenger category and which passes are accepted on specific services. ~~The notes below the tables show the amount of any Supplement or Discount that may be required or available.~~

Table 1:
~~Pass Prices, Acceptance, and Required Supplements or Discounts~~ One-Way Cash Fares

<u>Service</u>	<u>One-Way Cash</u>	
	<u>Adult & Youth</u>	<u>S/D/M</u>
<u>MTS Bus, Rapid, Express, Trolley, NCTD BREEZE and SPRINTER</u>	<u>\$2.50</u>	<u>\$1.25</u>
<u>MTS Rapid Express</u>	<u>\$5.00</u>	<u>\$2.50</u>
<u>NCTD FLEX</u>	<u>\$5.00</u>	<u>\$2.50</u>
<u>NCTD FLEX 372</u>	<u>\$10.00</u>	<u>\$5.00</u>

<u>MTS Rural</u>	<u>\$8.00</u>	<u>\$4.00</u>
<u>MTS Access/NCTD LIFT</u>	<u>NA</u>	<u>\$5.00</u>

Table 2: One-Way Cash Fares - COASTER
Single Boarding Fares by Service, Acceptance, Required Supplements, and Discounts

	One-Way Cash	
Service	<u>Adult</u>	<u>S/D/M & Youth</u>
<u>NCTD COASTER 1 Zone</u>	<u>\$5.00</u>	<u>\$2.50</u>
<u>NCTD COASTER 2 Zones</u>	<u>\$5.75</u>	<u>\$2.75</u>
<u>NCTD COASTER 3 Zones</u>	<u>\$6.50</u>	<u>\$3.25</u>

Table 3: Day Pass Prices

	Day Pass	
Service	<u>Adult</u>	<u>S/D/M & Youth</u>
<u>Regional</u>	<u>\$6.00</u>	<u>\$3.00</u>
<u>Premium Regional</u>	<u>\$12.00</u>	<u>\$6.00</u>
<u>COASTER Regional</u>	<u>\$15.00</u>	<u>\$7.50</u>

Table 4: Monthly/30 Day Pass Prices

	30-Day/Monthly	
Service	<u>Adult</u>	<u>S/D/M & Youth</u>
<u>Regional</u>	<u>\$72.00</u>	<u>\$23.00</u>
<u>Premium Regional</u>	<u>\$100.00</u>	<u>\$32.00</u>
<u>NCTD COASTER 1 Zone</u>	<u>\$140.00</u>	<u>\$58.00</u>

<u>NCTD COASTER 2 Zones</u>	<u>\$161.00</u>	
<u>NCTD COASTER 3 Zones</u>	<u>\$182.00</u>	

3.3 COASTER Zones

The COASTER Fares are based on three zones. The number of zones between stations is shown in Table 35. Passengers must purchase a single-trip or round-trip ticket or pass based on the number of zones between their origin and destination.

**Table 35
COASTER Stations and Zones**

To From	Oceanside	Carlsbad Village	Carlsbad Poinsettia	Encinitas	Solana Beach	Sorrento Valley	Old Town	Santa Fe Depot
Oceanside		1	1	1	1	2	3	3
Carlsbad Village	1		1	1	1	2	3	3
Carlsbad Poinsettia	1	1		1	1	2	3	3
Encinitas	1	1	1		1	2	3	3
Solana Beach	1	1	1	1		2	3	3
Sorrento Valley	2	2	2	2	2		2	2
Old Town	3	3	3	3	3	2		1
Santa Fe Depot	3	3	3	3	3	2	1	

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 Interstate 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.~~

3.54 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.

3.65 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 With the exception of Juror Day Passes and special marketing programs or event tickets/passes, all Day Passes shall be valid for travel on the specified services from the time of issue for the number of consecutive 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**

Day Pass	Price
2-Day Regular	\$9
3-Day Regular	\$12
4-Day Regular	\$15

~~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 \$12.~~

3.106 Classroom Day Tripper Pass

~~Classroom Day Trippers Passes are valid for travel between 9 a.m. and 3 p.m., and after 6 p.m. Monday through 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 15-12 people. One chaperone per every five students may ride at the Regional Classroom Day Tripper Pass price.~~

Valid on	Price
MTS Bus, SPRINTER, BREEZE, and Rapid Express	\$1.50
COASTER only	\$5
COASTER plus any of the following: MTS Bus, MTS Trolley, Rapid Express, SPRINTER, and BREEZE	\$64.50

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~~Pass.

3.117 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, 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.

3.128 Juror Day Pass

Any state or federal court in San Diego County may purchase Juror Passes after signing an agreement with MTS. 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. The agreement may include a portion of passes to be supplied free of charge to the courts in exchange for promoting transit use in all juror summons.

A Regional Juror Day Pass is valid for travel on all NCTD and MTS services except Rapid Express, COASTER, or Rural services. A ~~RegionPlus- COASTER Regional~~ 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 ~~COASTER Regional~~ ~~RegionPlus~~ Juror Day Passes sold to the courts shall be based on the price of the ~~COASTER Regional~~ ~~RegionPlus~~ Day Pass and included in the agreement with the court.

Each Juror Day Pass becomes activated/valid on the day it is tapped by the passenger.

3.139 Advance Purchase Group Day Pass Sales

Groups wishing to purchase a ~~minimum of 100~~ large amount of Regional Day Passes shall be entitled to obtain passes at ~~the discount~~ 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 from the Table 5 prices, as shown in Table 6. Additional discounts require the approval of the SANDAG Transportation Committee or SANDAG Board of Directors.~~

**Table 5
Prices for Advance Purchase Group Day Passes**

Days	Regional
One-Day	\$4.50
Two-Day	\$8
Three-Day	\$11
Four-Day	\$14
Five-Day	\$16

Six-Day	\$18
Seven-Day	\$20

Table 6
Additional Discount for Bulk Purchase of Advance Purchase Group Day Passes

Passes Purchased	Discount
1,000-1,999	5%
2,000-2,999	10%
3,000-3,999	15%
4,000 or more	20%

3.1410 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 to RegionPlus Day Pass~~

~~Upon implementation of Stored Value, 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 only is 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 roundtrip from the point of origin to the destination.

4.2 Multi-Trip Ticket Packs

Any transit operator may, at their option, bundle multiple single-trip tickets for any service they operate, and sell the tickets for the full face value of the tickets or with a discount of up to 10 percent.

4.3 Tokens

~~If tokens are made available, Tokens are a legacy fare that is no longer sold or issued, but remain in circulation. If a token is presented~~ they shall entitle the person holding the universal token to up to a \$2.50 cash fare value trip on any MTS bus, Trolley, BREEZE, or SPRINTER 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, Access, LIFT, or Rapid 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: COMPASS CARDS

5.1 Card Acquisition and Registration

MTS, 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.

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 MTS and may be revoked and/or confiscated by 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 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. MTS or NCTD may refuse any improper request for refund, or may make a partial refund. MTS or NCTD may deduct a processing fee of not more than 10 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. MTS or NCTD may charge ~~up to an \$8a~~ fee for placement of a photograph on the Compass Card. Compass Cards bearing a photograph only may be used by the person whose photograph appears on the card.

5.6 Stored Value

~~Once implemented by MTS or NCTD, the~~ The Stored Value feature of a Compass Card (Compass Cash) 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~~one-way fare 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~~purchase a Day Pass ~~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: COMPASS CLOUDMOBILE TICKETING

Compass Cloud is a Mobile Ticketing used on a mobile phone application allowing for the purchase of many of the fares available. It has the capability to offer the full range of fares and passes, including special events, universal passes, discounted fares, one-way fares, day passes and monthly passes. The products offered are at the discretion of the transit agencies. Discounted fares and universal passes require proof of eligibility to make the fares available. Refunds will not be issued for transit pass products loaded onto Compass Cloud.

SECTION 67: DISCOUNTED POST-SECONDARY AND GROUP PASSES

67.1 Post-Secondary Discounted Passes

MTS and NCTD shall each have the right to negotiate agreements, individually or jointly, with educational institutions. 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.

67.1.1 Discounted Calendar Monthly Post-Secondary Regional Pass

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

67.1.2 Discounted Post-Secondary Regional Quarter/Trimester/Semester Pass

The price of the quarter/trimester/semester pass for post-secondary educational institutions shall be based on 65 percent of the price of an Adult Regional Monthly / 30-Day Pass, divided by 31 and multiplied by the number of days in the academic term.

The discounted Regional pass shall be valid for unlimited travel during an academic term until the end of the Service Day on the last day of the academic term. All Regional Pass discounts, supplements, and upgrade rules apply to the Post-Secondary Regional Quarter/Trimester/Semester Pass.

~~6.1.3 SPRINTER/BREEZE Only Post-Secondary Pass~~

~~The SPRINTER/BREEZE Monthly Pass may be sold to post-secondary educational institutions with a discount of \$10 per month.~~

67.2 Group Pass Program

67.2.1 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 25-10 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 generally 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 may be sold at retail rates.

67.2.2 Universal Pass Program

MTS and NCTD shall each have the right to negotiate UPass agreements, individually or jointly, with sponsoring entities. MTS and NCTD may establish their own policies, terms, or eligibility rules regarding the sale of the UPass in the sales agreements.

SECTION 78: TRANSFERS WITH OTHER TRANSIT OPERATORS

78.1 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:

78.1.1 ~~MetroLink~~ Monthly/7Day Pass: This pass must have the correct current month, year, and list Oceanside as a valid city in order to be valid.

78.1.2 ~~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.

78.1.3 ~~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 Transfers~~

~~The following transfer agreement is in effect with the Orange County Transit Authority (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 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, and persons holding fares valid for COASTER use may ride Amtrak trains designated on the NCTD COASTER schedule as Rail 2 Rail trains. Passengers can determine if an agreement is in place by contacting NCTD.~~

SECTION 89: PARTICIPATION IN THE REGIONAL FARE SYSTEM

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

- 89.1** Transit operators participating in the Regional Fare System must operate fixed-route transit service with fixed, published schedules.
- 89.2** Transit Operators must serve an area not currently served by an existing publicly subsidized, fixed-route bus operator.
- 98.3** New transit operators will be incorporated into the Compass Card system to the extent feasible and practical as determined by MTS and NCTD.
- 98.4** Any transit provider selling or receiving Compass Card, Compass Cloud, or other MTS and NCTD 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 910: SPECIAL FARES

910.1 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.

910.2 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 12 months for seasonal events or for marketing purposes. These fares, because of their short term/temporary nature, are not included in this Ordinance.

SECTION 1011: S/D/M AND YOUTH COMPASS CARDS ELIGIBILITY AND REQUIREMENTS

1011.1 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.

1011.2 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.

1011.3 Persons with Disabilities and Medicare

1011.3.1 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.

1011.3.2 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:

- 1011.3.2.1** State of California DMV disabled identification card, (the white receipt from the DMV)
- 1011.3.2.2** State of California DMV placard identification card
- 1011.3.2.3** ADA Paratransit Identification Card
- 1011.3.2.4** 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
- 1011.3.2.5** Individualized Education Program from school for disabled students
- 1011.3.2.6** 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

1011.3.2.7 Letter from the Epilepsy Foundation

1011.3.2.8 Letter from the San Diego Center for the Blind

1011.3.2.9 Letter from the San Diego Regional Center

1011.3.2.10 Unexpired MTS or NCTD disabled identification card

1011.4 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 1112: ADA Paratransit

1112.1 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 only will be good on the system for which it was created. ADA prepaid fare media may not be loaded onto a Compass Card.

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.

MTS and NCTD may establish their own policies and prices regarding the sale of daily/monthly/30 day passes for fixed-route buses and trains to ADA-certified passengers; however, the prices to these customers must not exceed the S/D/M prices.

1112.2 ADA-LIFT and Access Transfers

Paratransit customers needing to transfer between MTS Access, and NCTD LIFT or FLEX will need to pay the corresponding fares. 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~~13: REGIONAL TICKET AND PASS ADMINISTRATION, REVENUE SHARING

Processes and rules regarding regional ticket and pass administration and revenue sharing may be the subject of one or more separate agreements between MTS and NCTD ~~as they see fit.~~

SECTION ~~13~~14: EFFECTIVE DATE OF ORDINANCE OR AMENDMENTS

This Ordinance shall go into effect on ~~August 25, 2014~~ March 10, 2019. Notwithstanding Board Policy No. 004: Rules of Procedure for Board of Directors and Committees, all amendments shall go into effect not less than 30 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 ~~825~~th of ~~July 2014~~ February 2019.

_____ 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 approved by the SANDAG Board of Directors on ~~25th-8th~~ of ~~July 2014~~February 2019, at the time and by the vote stated above, which said Ordinance is on file in the office of SANDAG.

DATED: _____, ~~2014~~2019

Clerk of the Board



401 B Street, Suite 800
San Diego, CA 92101
Phone (619) 699-1900
Fax (619) 699-1905
sandag.org

COMMISSION ORDINANCE CO-19-01

AN ORDINANCE OF THE SAN DIEGO COUNTY REGIONAL TRANSPORTATION COMMISSION AMENDING REGIONAL TRANSPORTATION COMMISSION ORDINANCE NO. CO-04-01 RELATED TO FARE CHANGES

THE SAN DIEGO COUNTY REGIONAL TRANSPORTATION COMMISSION ORDAINS AS FOLLOWS:

The language in Section 4(C)(3) to Regional Transportation Commission Ordinance No. CO-04-01 is hereby amended to read as set forth below:

From the remaining revenues, there shall be expended such sums as necessary to guarantee in the North San Diego County Transit Development Board and Metropolitan Transit Development Board areas of jurisdiction for the duration of the measure (1) a monthly regional transit pass for senior (~~60~~ 65 years or older) and disabled riders priced at not more than ~~25~~ 50 percent of the cost of the regular regional monthly transit pass, and (2) a monthly regional youth transit pass for students (18 years or under) priced at not more than 50 percent of the cost of the regular regional monthly transit pass.

PASSED AND ADOPTED this 8th of February 2019.

AYES:

NOES:

ABSENT:

Chair of the Board of Directors
of the San Diego County Regional
Transportation Commission

[Seal]

Attest:

Secretary of the Board of Directors of the
San Diego County Regional Transportation
Commission

4.1 Public Engagement Efforts

The San Diego Association of Governments (SANDAG), in conjunction with the Metropolitan Transit System (MTS) and the North County Transit District (NCTD), conducted public outreach to seek input on proposed transit fare changes affecting the MTS and NCTD service areas. The proposed transit fare changes require amendments to the Regional Comprehensive Fare Ordinance and the *TransNet* Ordinance. For this reason, SANDAG's public outreach was conducted in accordance with SANDAG [Board Policy No. 004: Rules of Procedure for Board of Directors, Policy Advisory Committees, and other Legislative Bodies](#); [Board Policy No. 025: Public Participation Plan Policy](#); and [Board Policy No. 029: Regional Fare Policy and Comprehensive Fare Ordinance](#).

SANDAG, along with MTS and NCTD, hosted six public meetings throughout the region to solicit input between October 22, 2018, and November 1, 2018. Two weeks in advance of these meetings, "Take One" fliers in English and Spanish were posted on affected public transit vehicles and advertisements were placed in the Union Tribune and La Prensa notifying riders of the proposed changes; the time, date, and location of the public meetings; and other ways to provide input.

Additionally, SANDAG created a web page (sandag.org/fares) summarizing the proposed changes, providing the details of the public meetings, and offering other ways to provide input including a comment form, an email address (pio@sandag.org), an open phone line, and SANDAG's physical address for written comments. MTS and NCTD not only posted web pages regarding the proposed changes and the public meetings, but also created surveys to gather further input. These surveys were distributed at the public meetings and posted online for members of the public to complete.

SANDAG publicized the public meetings through the October Region Newsletter, a press release, media advisories, and social media posts. Further, the proposed fare changes were presented to SANDAG's Community Based Organizations Working Group on October 4, 2018. All public notices and outreach materials listed above are included in Appendix A of this Attachment.

At the public meetings, participants could ask questions of staff, complete the MTS or NCTD surveys provided in English and Spanish, and provide official public testimony recorded by SANDAG staff. Each meeting was opened and closed by a public hearings officer, who ensured the meeting adhered to SANDAG policies and procedures for public input. A copy of the agenda as well as the contact information of SANDAG staff who recorded official public testimony for each public meeting is listed in Appendix A.

In addition to the public meetings and other outreach detailed in earlier pages, MTS and NCTD also led informal "pop-up" events at transit centers in their respective service areas, informing riders of potential fare changes, gathering input, and encouraging riders to complete their fare surveys. The details of these "pop-up" events, along with other public meetings where MTS staff notified riders of potential fare changes and handed out fare surveys, are listed in Appendix A.

4.2 Public Feedback Received

SANDAG received 629 public comments via mail, email, SANDAG's online comment form, voicemail, audio and written testimony recorded at public meetings, and via MTS and NCTD surveys. SANDAG staff transcribed fare-related voicemails and recorded audio testimony as well as translated comments received in a language other than English. SANDAG staff also redacted any personally identifiable information. All 629 comments are included in Appendix B, categorized by communication type.

Agenda Item 4 — Attachment 4:

Appendix A – Public Notices and Outreach Materials

The full document in electronic format can be downloaded at
<https://www.sandag.org/index.asp?meetingid=5036&fuseaction=meetings.detail>

A reference copy will be available at the meeting. For a printed copy, please contact the Public Information Office at (619) 699-1950 or pio@sandag.org.

Agenda Item 4 — Attachment 4:

Appendix B – Public Feedback

The full document in electronic format can be downloaded at
<https://www.sandag.org/index.asp?meetingid=5036&fuseaction=meetings.detail>

A reference copy will be available at the meeting. For a printed copy, please contact the Public Information Office at (619) 699-1950 or pio@sandag.org.

SANDAG Draft Title VI Fare Equity Analysis for Fare Change Proposed for 2019

LTK Engineering Services

December 18, 2018

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Purpose of Analysis

Pursuant to the San Diego Association of Government's (SANDAG) Board Policy No. 018, and in accordance with federal Title VI civil rights requirements (FTA Circular 4702.1B, October 1, 2012), SANDAG is responsible for evaluating whether any proposed change to the Fare Ordinance will have a disparate impact on minorities (based on race, color, or national origin) or result in a disproportionate burden on low-income persons. Pursuant to the FTA Circular and the FTA Title VI FAQ dated December 2012, the Fare Equity Analysis is conducted for fixed route transit, including both bus and rail services.

SANDAG Title VI Requirements

Pursuant to SANDAG's Board Policy No. 018, section 1.2, the process to be followed in determining whether a fare change has a disparate impact on minorities or a disproportionate burden on low-income individuals is as follows:

- 1.2.1.1 SANDAG will determine the existence of disparate impacts to minority populations for all Fare Ordinance changes. Pursuant to Title VI of the Civil Rights Act, disparate impacts are found when there is a difference in adverse effects between minority and non-minority areas of ten percent (10%) or more. Minority populations will be deemed adversely affected when the proportion of minority persons adversely affected by the change exceeds the average proportion of minority persons in the analysis service area. If SANDAG, in consultation with the transit operators, chooses to implement a proposed fare change in the Fare Ordinance despite a finding of disparate impact on minority populations, or if SANDAG finds, in consultation with the transit operators, even after the revisions, that minority populations will continue to bear a disproportionate share of the adverse effects of a proposed fare change, SANDAG may implement the fare change only if:
 - 1.2.1.1.1 There is a substantial legitimate justification for the proposed fare change, and
 - 1.2.1.1.2 A finding is made that there are no alternatives that would have a less disparate impact on minority populations and still accomplish the legitimate goals of the fare change.
- 1.2.1.2 SANDAG will determine the existence of disproportionate burdens on low-income populations for all Fare Ordinance changes. Pursuant to Executive Order 12898 (Clinton 1994), disproportionate burdens are found when there is a difference in adverse effects between low-income and non-low income populations of ten percent (10%) or more. Low-income populations will be deemed adversely affected when the proportion of low-income persons (using a threshold of at or below 200 percent of the U.S. Department of Health and Human Services poverty guidelines) adversely affected exceeds the average proportion of low-income persons in the analysis service area. If SANDAG chooses, in consultation with the transit operators, to implement a proposed fare change in the Fare Ordinance

despite a finding of disproportionate burden on low-income ridership, or if SANDAG finds, in consultation with the transit operators, even after the revisions, that low-income riders will continue to bear a disproportionate burden due to the proposed fare change, SANDAG may implement the fare change only if the transit agency(ies) show that they will:

- 1.2.1.2.1 Take steps to avoid, minimize, or mitigate impacts where practicable, and
- 1.2.1.2.2 Provide a description of alternatives available to low-income populations affected by the fare changes.

This process is not intended by SANDAG, MTS, NCTD or the FTA to be an absolute determination of discrimination. Rather, the finding of a potential disparate impact or disproportionate burden according to this test is intended to *trigger additional steps* that otherwise can be skipped.

This analysis also does not contemplate an assessment of the relative equity of the fare structure *as it exists today*, only of whether the proposed changes are themselves equitable. This is in accordance with FTA guidance.

Description of Proposed Fare Change

SANDAG, the San Diego Metropolitan Transit System (MTS), and the North County Transit District (NCTD) are currently considering changes to fares in the region. The current fixed route fare structure and proposed changes are set forth in Table 1 below. These changes are proposed to be implemented February 24, 2019.

In addition, SANDAG, MTS and NCTD are implementing a new definition of “senior” so that it will only apply to riders over the age of 65 compared with the current age of 60. However, all individuals who are certified as a senior prior to February 24, 2019 will continue to be considered a “senior” and will not be subject to the changed definition. Therefore, no individual will experience an increase or decrease in fares as a result of this changed definition. All individuals who are not certified as a senior by February 24, 2019 can expect to experience a delay in when they qualify for the reduced “senior” fares.

The agencies also considered other changes to current and future fares, however no other changes to fixed route are proposed for adoption at this time. A separate Fare Equity Analysis will be conducted prior to proposing any additional changes to the fixed route fare structure in the future.

Dataset and Methodology

As required by this policy and FTA Circular 4702.1B, SANDAG has calculated the number of minority and low-income boardings taken with each fare product that is currently offered by MTS or NCTD. This data was obtained from the 2015 SANDAG On-Board Transit Survey and annual calculations of ridership by fare product.

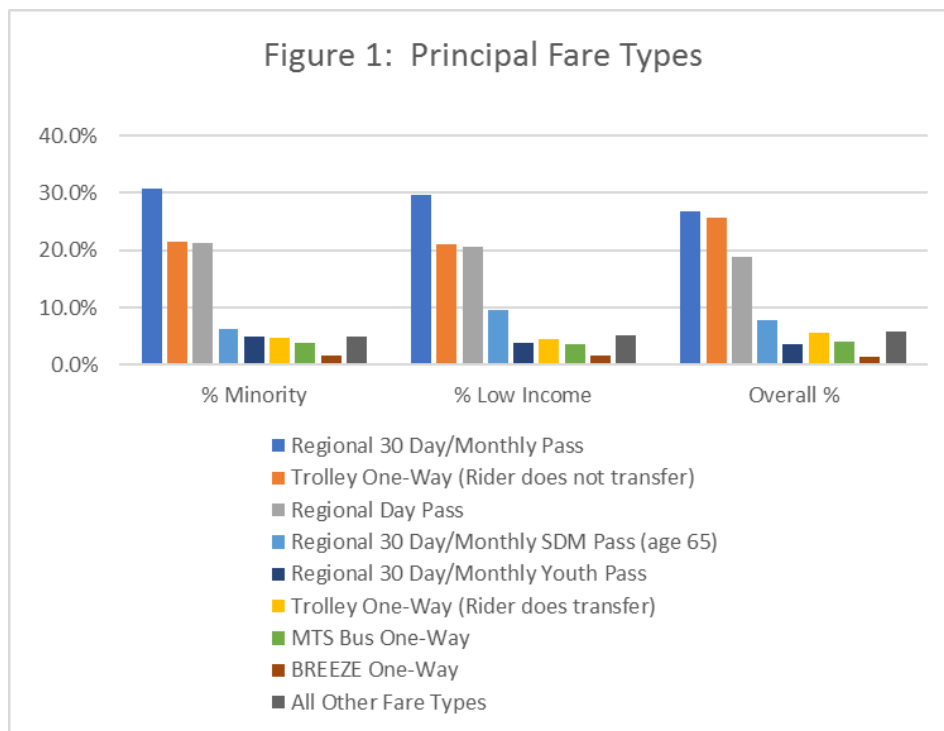
Table 1: Current Fare Structure and Proposed Changes

Fare Type	Proposed Change	Fare		Fare Change	
		Existing	Proposed	Absolute	%
Regional 30 Day/Monthly Pass	No Change	\$ 72.00	\$ 72.00	\$ -	0%
Regional 30 Day/Monthly Youth Pass	Combined into single, lower cost, SDM/Youth Monthly Pass	\$ 36.00	\$ 23.00	\$ (13.00)	-36%
Regional 30 Day/Monthly SDM Pass (age 65)	Increase	\$ 18.00	\$ 23.00	\$ 5.00	28%
2 Day Regional Pass	Eliminate, Riders use Day Passes (2)	\$ 9.00	\$ 12.00	\$ 3.00	33%
3 Day Regional Pass	Eliminate, Riders use Day Passes (3)	\$ 12.00	\$ 18.00	\$ 6.00	50%
4 Day Regional Pass	Eliminate, Riders use Day Passes (4)	\$ 15.00	\$ 24.00	\$ 9.00	60%
14 Day Regional Pass	Eliminate, Riders use Day Passes (10) or Monthly	\$ 43.00	\$ 60.00	\$ 17.00	40%
Regional Day Pass	Increase	\$ 5.00	\$ 6.00	\$ 1.00	20%
Regional Reduced Fare (SDM/Youth) Day Pass	New Fare Product, Riders previously used Regional Day Pass (or cash fare)	\$ 5.00	\$ 3.00	\$ (2.00)	-40%
Region Plus Day Pass (new Premium Regional Day Pass)	No longer includes COASTER service (80%)	\$ 12.00	\$ 12.00	\$ -	0%
Region Plus Day Pass	Including COASTER service (15% of riders)	\$ 12.00	\$ 15.00	\$ 3.00	25%
Rapid Express 30 Day/Monthly Pass	No Change	\$ 100.00	\$ 100.00	\$ -	0%
Rapid Express 30 Day/Monthly Youth Pass	Combined into single, lower cost, SDM/Youth Monthly Pass	\$ 50.00	\$ 32.00	\$ (18.00)	-36%
Rapid Express 30 Day/Monthly SDM Pass	Increase	\$ 25.00	\$ 32.00	\$ 7.00	28%
MTS Bus One-Way	Increase	\$ 2.25	\$ 2.50	\$ 0.25	11%
MTS Express One-Way (Routes 20, 50, 60, 110, 150, 235, 237, 870, 950)	No Change	\$ 2.50	\$ 2.50	\$ -	0%
MTS Rapid Express One-Way	No Change	\$ 5.00	\$ 5.00	\$ -	0%
MTS Rural 1 Zone	Increase (2 Rural Zones are combined) (4%)	\$ 5.00	\$ 8.00	\$ 3.00	60%
MTS Rural 2 Zone	Decrease (2 Rural Zones are combined.) (76%)	\$ 10.00	\$ 8.00	\$ (2.00)	-20%
MTS Rural 1 Zone SDM	Increase (2 Rural Zones are combined) (1%)	\$ 2.50	\$ 4.00	\$ 1.50	60%
MTS Rural 2 Zone SDM	Decrease (2 Rural Zones are combined.) (19%)	\$ 5.00	\$ 4.00	\$ (1.00)	-20%
Trolley One-Way (Rider does not transfer)	No Change (82% of riders)	\$ 2.50	\$ 2.50	\$ -	0%
Trolley One-Way (Rider does transfer)	Eliminate free transfer, Rider pays twice (18%)	\$ 2.50	\$ 5.00	\$ 2.50	100%
SDM MTS Bus One-Way	Increase	\$ 1.10	\$ 1.25	\$ 0.15	14%
SDM Express One-Way	No Change	\$ 1.25	\$ 1.25	\$ -	0%
SDM Rapid Express One-Way	No Change	\$ 2.50	\$ 2.50	\$ -	0%
BREEZE One-Way	Increase	\$ 1.75	\$ 2.50	\$ 0.75	43%
BREEZE SDM One-Way	Increase	\$ 0.75	\$ 1.25	\$ 0.50	67%
SPRINTER One-Way	Increase	\$ 2.00	\$ 2.50	\$ 0.50	25%
SPRINTER SDM On-Way	Increase	\$ 1.00	\$ 1.25	\$ 0.25	25%
SPRINTER/BREEZE 30 Day/Monthly	Eliminate, Riders use higher cost Regional Pass	\$ 59.00	\$ 72.00	\$ 13.00	22%
COASTER One-Way (1 Zone)	Increase	\$ 4.00	\$ 5.00	\$ 1.00	25%
COASTER One-Way (2 Zone)	Increase	\$ 5.00	\$ 5.75	\$ 0.75	15%
COASTER One-Way (3 Zone)	Increase	\$ 5.50	\$ 6.50	\$ 1.00	18%
COASTER One-Way (1 Zone) SDM	Increase	\$ 2.00	\$ 2.50	\$ 0.50	25%
COASTER One-Way (2 Zone) SDM	Increase	\$ 2.50	\$ 2.75	\$ 0.25	10%
COASTER One-Way (3 Zone) SDM	Increase	\$ 2.75	\$ 3.25	\$ 0.50	18%
COASTER One-Way (1 Zone) Y	Combined into single, lower cost, SDM/Youth fare	\$ 4.00	\$ 2.50	\$ (1.50)	-38%
COASTER One-Way (2 Zone) Y	Combined into single, lower cost, SDM/Youth fare	\$ 5.00	\$ 2.75	\$ (2.25)	-45%
COASTER One-Way (3 Zone) Y	Combined into single, lower cost, SDM/Youth fare	\$ 5.50	\$ 3.25	\$ (2.25)	-41%
COASTER 30 Day/Monthly Pass (1 Zone)	Increase	\$ 120.00	\$ 140.00	\$ 20.00	17%
COASTER 30 Day/Monthly Pass (2 Zone)	Increase	\$ 150.00	\$ 161.00	\$ 11.00	7%
COASTER 30 Day/Monthly Pass (3 Zone)	Increase	\$ 165.00	\$ 182.00	\$ 17.00	10%
COASTER 30 Day/Monthly Pass Youth	Combined into single, lower cost, SDM/Youth Monthly Pass	\$ 82.50	\$ 58.00	\$ (24.50)	-30%
COASTER 30 Day/Monthly Pass SDM	Increased	\$ 41.25	\$ 58.00	\$ 16.75	41%
COASTER SDM/Youth Day Pass	New Fare Product, Riders previously used full fare RegionPlus Day Pass	\$ 12.00	\$ 7.50	\$ (4.50)	-38%
SPRINTER/BREEZE SDM Day Pass	Eliminate, Riders use new, higher cost, Regional Reduced Fare Day Pass	\$ 2.25	\$ 3.00	\$ 0.75	33%

This On-Board Survey effort involved two types of surveys with bus and rail riders in the San Diego Service area: on-to-off counts and an origin-destination survey. Surveys were conducted on the Metropolitan Transit System (MTS) Bus, MTS Rail (Trolley), NCTD BREEZE, NCTD COASTER, and NCTD SPRINTER. Overall, over 88,000 On-to-Off Counts Surveys and nearly 33,900 Origin-Destination Surveys were completed. Both surveys were carried out by ETC Institute on behalf of SANDAG between February 2015 and December 2015. The demographic and fare payment information in the survey provided SANDAG with the percentage of riders for each fare product who are considered to be a minority or a low-income rider.

The information from the On-Board Survey is combined with calculations on the boardings by fare product based on farebox data, APC data, and annual surveys of fare use. This provides information on the boardings by fare product and allows calculation of the number of boardings by fare product for minority and low-income individuals.

MTS and NCTD have numerous fare types. Figure 1 below shows the principal fare types used by riders across both MTS and NCTD systems.



Effect on Minority Populations

The FTA defines a minority person as anyone who is American Indian or Alaska Native, Asian, Black or African American, Hispanic or Latino, or Native Hawaiian or other Pacific Islander. Table 2 below presents the estimates of minority and total riders for each fare product being changed, and for all other riders, that resulted from SANDAG’s analysis of survey and other data. Table 2 also presents the percent change in the fare for each group of riders.

Table 2: Minority and Total Ridership by Current Fare Structure with Proposed Changes

Fare Type	% Fare Change	# of Riders		# of Riders Adversely Impacted (Any Fare Increase)		Impact (% Fare Change * # of Riders)	
		Minority	Total	Minority	Total	Minority	Total
Regional 30 Day/Monthly Pass	0%	57,463	78,356	-	-	-	-
Regional 30 Day/Monthly Youth Pass	-36%	9,305	10,775	-	-	(3,360)	(3,891)
Regional 30 Day/Monthly SDM Pass (age 65)	28%	11,534	22,961	11,534	22,961	3,204	6,378
2 Day Regional Pass	33%	21	30	21	30	7	10
3 Day Regional Pass	50%	50	66	50	66	25	33
4 Day Regional Pass	60%	338	458	338	458	203	275
14 Day Regional Pass	40%	227	330	227	330	90	130
Regional Day Pass	20%	39,711	52,730	39,711	52,730	7,942	10,546
Regional Reduced Fare (SDM/Youth) Day Pass	-40%	1,126	2,070	-	-	(450)	(828)
Region Plus Day Pass (new Premium Regional Day Pass)	0%	2,044	2,586	-	-	-	-
Region Plus Day Pass	25%	383	646	383	646	96	162
Rapid Express 30 Day/Monthly Pass	0%	502	1,148	-	-	-	-
Rapid Express 30 Day/Monthly Youth Pass	-36%	0	0	-	-	-	-
Rapid Express 30 Day/Monthly SDM Pass	28%	125	358	125	358	35	100
MTS Bus One-Way	11%	7,263	11,106	7,263	11,106	807	1,234
MTS Express One-Way (Routes 20, 50, 60, 110, 150, 235, 237, 870, 950)	0%	336	561	-	-	-	-
MTS Rapid Express One-Way	0%	6	18	-	-	-	-
MTS Rural 1 Zone	60%	5	7	5	7	3	4
MTS Rural 2 Zone	-20%	100	133	-	-	(20)	(27)
MTS Rural 1 Zone SDM	60%	1	2	1	2	1	1
MTS Rural 2 Zone SDM	-20%	25	33	-	-	(5)	(7)
Trolley One-Way (Rider does not transfer)	0%	39,917	52,503	-	-	-	-
Trolley One-Way (Rider does transfer)	100%	8,762	11,525	8,762	11,525	8,762	11,525
SDM MTS Bus One-Way	14%	454	944	454	944	62	129
SDM Express One-Way	0%	0	2	-	-	-	-
SDM Rapid Express One-Way	0%	0	2	-	-	-	-
BREEZE One-Way	43%	3,171	3,970	3,171	3,970	1,359	1,701
BREEZE SDM One-Way	67%	74	131	74	131	49	87
SPRINTER One-Way	25%	634	794	634	794	159	199
SPRINTER SDM On-Way	25%	15	26	15	26	4	7
SPRINTER/BREEZE 30 Day/Monthly	22%	1,049	1,453	1,049	1,453	231	320
COASTER One-Way (1 Zone)	25%	9	44	9	44	2	11
COASTER One-Way (2 Zone)	15%	56	280	56	280	8	42
COASTER One-Way (3 Zone)	18%	60	299	60	299	11	54
COASTER One-Way (1 Zone) SDM	25%	1	4	1	4	0	1
COASTER One-Way (2 Zone) SDM	10%	6	23	6	23	1	2
COASTER One-Way (3 Zone) SDM	18%	6	24	6	24	1	4
COASTER One-Way (1 Zone) Y	-38%	1	5	-	-	(0)	(2)
COASTER One-Way (2 Zone) Y	-45%	8	34	-	-	(4)	(15)
COASTER One-Way (3 Zone) Y	-41%	9	37	-	-	(4)	(15)
COASTER 30 Day/Monthly Pass (1 Zone)	17%	412	666	412	666	69	111
COASTER 30 Day/Monthly Pass (2 Zone)	7%	239	676	239	676	18	50
COASTER 30 Day/Monthly Pass (3 Zone)	10%	457	1,471	457	1,471	47	152
COASTER 30 Day/Monthly Pass Youth	-30%	183	242	-	-	(54)	(72)
COASTER 30 Day/Monthly Pass SDM	41%	212	678	212	678	86	275
COASTER SDM/Youth Day Pass	-38%	128	162	-	-	(48)	(61)
SPRINTER/BREEZE SDM Day Pass	33%	13	69	13	69	4	23
TOTAL ALL FARES		186,441	260,437	75,288	111,770	19,340	28,649
		71.59%		67.36%		67.50%	

As defined by SANDAG's policy the existence, or non-existence, of disparate impacts to the minority populations is determined by whether the proportion of minority persons adversely affected by the change exceeds the average proportion of minority persons in the analysis service area by more than 10%. To determine this, individuals facing a fare increase were considered to be adversely affected by the fare change. The proportion of minority persons adversely affected by the change was calculated based on the number minority persons who faced a fare increase and the total number of riders who faced a fare increase. The average proportion of minority persons in the analysis service area was calculated as the proportion that minority persons made up of all riders. The key results are as follows:

- The proportion of minority persons adversely affected by the change is: 67.36%
- The average proportion of minority persons in the analysis service area is: 71.59%
- As the proportion of minority persons adversely affected by the change does not exceed the average proportion of minority persons in the analysis service area by more than 10%, there is **no disparate impact**.

A second calculation was conducted to estimate the proportion of the fare increase burden born by minority persons compared with the proportion that minority persons make up of all riders. This calculation takes into account that the fare change reduces the fares for some riders, reducing the burden on those riders, and also that a larger fare change places a greater burden on a rider than a smaller fare change. The two rightmost columns in Table 2 therefore show the result of multiplying the percentage change in price of each fare product times the number of riders using that fare product. A fare product which has a price reduction (such as the Regional 30 Day / Monthly Youth Pass) shows a negative number in these columns as it reduces the burden on riders, while a fare product which has a price increase (such as the Regional 30 Day / Monthly Senior Disabled Medicare Pass) shows a positive number as it increases the burden on riders. This calculation was performed separately for all riders and for minority persons, and these totals were then used to estimate the proportion of the fare increase burden born by minority persons. This was compared with the average proportion of minority persons in the analysis service area, calculated as discussed above.

- The proportion of the fare increase burden born by minority persons is: 67.50%
- The average proportion of minority persons in the analysis service area is: 71.75%
- As the proportion of the fare increase burden born by minority persons does not exceed the average proportion of minority persons in the analysis service area by more than 10%, this confirms that there is **no disparate impact**.

Effect on Low-Income Populations

The FTA defines a low-income person as a person whose household income is at or below the U.S. Department of Health and Human Services (HHS) poverty guidelines, unless the agency has adopted a different, broader, definition. SANDAG defines a low-income person as a person whose household income is at or below 200% of the U.S. Department of Health and Human Services (HHS) poverty guidelines. Table 3 below presents the estimates of low-income and total riders for each fare product

being changed, and for all other riders, that resulted from SANDAG's analysis of survey and other data. Table 3 also presents the percent change in the fare for each group of riders.

As defined by SANDAG's policy the existence, or non-existence, of a disproportionate burden on low-income riders is determined by whether the proportion of low-income persons adversely affected by the change exceeds the average proportion of low-income persons in the analysis service area by more than 10%. To determine this, individuals facing a fare increase were considered to be adversely affected by the fare change. The proportion of low-income persons adversely affected by the change was calculated based on the number low-income persons who faced a fare increase and the total number of riders who faced a fare increase. The average proportion of low-income persons in the analysis service area was calculated as the proportion that low-income persons made up of all riders. The key results are as follows:

- The proportion of low-income persons adversely affected by the change is: 65.95%
- The average proportion of low-income persons in the analysis service area is: 66.17%
- As the proportion of low-income persons adversely affected by the change does not exceed the average proportion of low-income persons in the analysis service area by more than 10%, there is **no disproportionate burden**.

A second calculation was conducted to estimate the proportion of the fare increase burden born by low-income persons compared with the proportion that low-income persons make up of all riders. This calculation takes into account that the fare change reduces the fares for some riders, reducing the burden on those riders, and also that a larger fare change places a greater burden on a rider than a smaller fare change. The two rightmost columns in Table 3 therefore show the result of multiplying the percentage change in price of each fare product times the number of riders using that fare product. A fare product which has a price reduction (such as the Regional 30 Day / Monthly Youth Pass) shows a negative number in these columns as it reduces the burden on riders, while a fare product which has a price increase (such as the Regional 30 Day / Monthly Senior Disabled Medicare Pass) shows a positive number as it increases the burden on riders. The calculations were performed separately for all riders and for low-income persons, and these totals were then used to estimate the proportion of the fare increase burden born by low-income persons. This was compared with the average proportion of low-income persons in the analysis service area, calculated as discussed above.

- The proportion of the fare increase burden born by low-income persons is: 66.38%
- The average proportion of low-income persons in the analysis service area is: 66.17%
- As the proportion of the fare increase burden born by low-income persons does not exceed the average proportion of low-income persons in the analysis service area by more than 10%, this confirms that there is **no disproportionate burden**.

Table 3: Low-Income and Total Ridership by Current Fare Structure with Proposed Changes

Fare Type	% Fare Change	# of Riders		# of Riders Adversely Impacted (Any Fare Increase)		Impact (% Fare Change * # of Riders)	
		Low-Income	Total	Low-Income	Total	Low-Income	Total
Regional 30 Day/Monthly Pass	0%	42,850	66,231	-	-	-	-
Regional 30 Day/Monthly Youth Pass	-36%	5,698	7,300	-	-	(2,058)	(2,636)
Regional 30 Day/Monthly SDM Pass (age 65)	28%	13,952	19,302	13,952	19,302	3,876	5,362
2 Day Regional Pass	33%	22	27	22	27	7	9
3 Day Regional Pass	50%	46	69	46	69	23	35
4 Day Regional Pass	60%	252	382	252	382	151	229
14 Day Regional Pass	40%	226	306	226	306	89	121
Regional Day Pass	20%	29,578	43,698	29,578	43,698	5,916	8,740
Regional Reduced Fare (SDM/Youth) Day Pass	-40%	1,230	1,737	-	-	(492)	(695)
Region Plus Day Pass (new Premium Regional Day Pass)	0%	1,710	2,259	-	-	-	-
Region Plus Day Pass	25%	321	565	321	565	80	141
Rapid Express 30 Day/Monthly Pass	0%	275	1,056	-	-	-	-
Rapid Express 30 Day/Monthly Youth Pass	-36%	0	0	-	-	-	-
Rapid Express 30 Day/Monthly SDM Pass	28%	106	256	106	256	30	72
MTS Bus One-Way	11%	5,262	9,302	5,262	9,302	585	1,034
MTS Express One-Way (Routes 20, 50, 60, 110, 150, 235, 237, 870, 950)	0%	237	524	-	-	-	-
MTS Rapid Express One-Way	0%	6	18	-	-	-	-
MTS Rural 1 Zone	60%	3	7	3	7	2	4
MTS Rural 2 Zone	-20%	55	124	-	-	(11)	(25)
MTS Rural 1 Zone SDM	60%	1	2	1	2	0	1
MTS Rural 2 Zone SDM	-20%	14	31	-	-	(3)	(6)
Trolley One-Way (Rider does not transfer)	0%	30,185	44,720	-	-	-	-
Trolley One-Way (Rider does transfer)	100%	6,626	9,817	6,626	9,817	6,626	9,817
SDM MTS Bus One-Way	14%	406	671	406	671	55	91
SDM Express One-Way	0%	0	2	-	-	-	-
SDM Rapid Express One-Way	0%	0	2	-	-	-	-
BREEZE One-Way	43%	2,462	3,272	2,462	3,272	1,055	1,402
BREEZE SDM One-Way	67%	60	113	60	113	40	75
SPRINTER One-Way	25%	492	654	492	654	123	164
SPRINTER SDM On-Way	25%	12	23	12	23	3	6
SPRINTER/BREEZE 30 Day/Monthly	22%	722	1,020	722	1,020	159	225
COASTER One-Way (1 Zone)	25%	7	44	7	44	2	11
COASTER One-Way (2 Zone)	15%	43	280	43	280	6	42
COASTER One-Way (3 Zone)	18%	46	299	46	299	8	54
COASTER One-Way (1 Zone) SDM	25%	1	4	1	4	0	1
COASTER One-Way (2 Zone) SDM	10%	5	23	5	23	1	2
COASTER One-Way (3 Zone) SDM	18%	6	24	6	24	1	4
COASTER One-Way (1 Zone) Y	-38%	1	5	-	-	(0)	(2)
COASTER One-Way (2 Zone) Y	-45%	8	34	-	-	(4)	(15)
COASTER One-Way (3 Zone) Y	-41%	9	37	-	-	(4)	(15)
COASTER 30 Day/Monthly Pass (1 Zone)	17%	511	659	511	659	85	110
COASTER 30 Day/Monthly Pass (2 Zone)	7%	75	632	75	632	6	46
COASTER 30 Day/Monthly Pass (3 Zone)	10%	133	1,341	133	1,341	14	138
COASTER 30 Day/Monthly Pass Youth	-30%	118	162	-	-	(35)	(48)
COASTER 30 Day/Monthly Pass SDM	41%	150	503	150	503	61	204
COASTER SDM/Youth Day Pass	-38%	107	141	-	-	(40)	(53)
SPRINTER/BREEZE SDM Day Pass	33%	20	29	20	29	7	10
TOTAL ALL FARES		144,049	217,705	61,546	93,321	16,364	24,654
		66.17%		65.95%		66.38%	



401 B Street, Suite 800
San Diego, CA 92101
Phone (619) 699-1900 • Fax (619) 699-1905
www.sandag.org

RESOLUTION NO. 2019-12

FINDINGS IN SUPPORT OF NOTICE OF EXEMPTION UNDER THE
CALIFORNIA ENVIRONMENTAL QUALITY ACT RELATING TO FARE MODIFICATIONS
INCORPORATED INTO AN AMENDED COMPREHENSIVE FARE ORDINANCE

WHEREAS, the Metropolitan Transit System (MTS) and the North County Transit District (NCTD) have not increased fares in ten (10) years, even as operating expenses have continued to increase;

WHEREAS, MTS has a projected budget shortfall for fiscal year 2019 and NCTD has farebox recovery ratios that fall below levels mandated by State statute;

WHEREAS, a Comprehensive Fare Ordinance amendment incorporating modifications is necessary to provide MTS and NCTD the ability to revise fares for purposes of simplification of the regional fare structure, to clarify the fare rules for the region, and to increase revenue to bridge funding shortfalls and/or improve farebox recovery ratio levels mandated by State statute; 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, it has been made clear that any 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:

Both MTS and NCTD need to revise fares to both simplify the fare structure and to increase revenue for purposes of meeting operating expenses.

PASSED AND ADOPTED this 8th of February 2019.

CHAIR

ATTEST:

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.

SANDAG Independent Performance Auditor

Overview

The Audit Committee initiated a recruitment for the Independent Performance Auditor position in July 2018, which included a review of the primary job functions, education and experience requirements, and proposed compensation and benefits package. Following stakeholder engagement activities, the position was advertised in mid-September through mid-October; 24 applications were received.

Key Considerations

With assistance from Ralph Andersen & Associates, the executive recruitment firm hired for this project, the Selection Subcommittee (composed of two members of the Audit Committee: Mayor Bill Wells and Robert Monson) short-listed four candidates who interviewed with the Audit Committee on December 14, 2018. Based on these interviews, the Audit Committee recommended two candidates to the Board of Directors; these individuals were interviewed by the Board on January 11, 2019.

Following finalist interviews, the Board identified a preferred candidate for the Independent Performance Auditor position and authorized the Vice Chair and Audit Committee Vice Chair, the agency's designated representatives (per Government Code section 54957.6), to negotiate terms and conditions of employment that are consistent with organizations comparable to SANDAG.

A summary of the proposed salary, benefits, and other terms of employment discussed with the candidate is shown in Attachment 1.

Next Steps

If approved by the Board, the proposed terms and conditions would be incorporated into an At-Will Executive Employment Agreement to be executed by the SANDAG Chair.

Catherine Blakespear, SANDAG Vice Chair and Bill Baber, Audit Committee Vice Chair

Key Staff Contact: Laura Coté, (619) 699-6947, laura.cote@sandag.org

Attachment: 1. SANDAG Independent Performance Auditor – Proposed Terms and Conditions of Employment

Action Requested: **Approve**

The Board of Directors is asked to:

- (1) discuss and approve the proposed salary, benefits, and other terms of employment for the Independent Performance Auditor position; and
- (2) authorize the Chair to execute an employment agreement with the candidate recommended by the Audit Committee and selected by the Board in closed session on January 11, 2019, including such terms.

Fiscal Impact:

Funds for the Independent Performance Auditor position were approved as part of the FY 2019 Annual Program Budget.

Schedule/Scope Impact:

Upon approval of the terms and conditions of employment, an At-Will Executive Employment Agreement will be executed.

**SANDAG Independent Performance Auditor
Proposed Terms and Conditions of Employment**

The following is a summary of proposed terms and conditions for the SANDAG Independent Performance Auditor position. If approved by the Board of Directors, these items would be incorporated into the At-Will Executive Employment Agreement, and the agreement would be signed by both SANDAG and the selected Independent Performance Auditor candidate.

<u>Item</u>	<u>Description</u>
Contract Term	2 years, with 2-year renewal unless notice provided by either party
Anticipated Start Date	April 3, 2019
Work Schedule	4/10 schedule (working Tuesday through Friday each week, and off every Monday)
Severance (for termination without cause)	Continuation of base salary and fringe benefits through the agreement term
Employee Resignation Notice	120 days
Salary	\$195,000 annually
Salary Increases / Performance Bonus	To be approved by the Board; based on annual performance
CalPERS Pension	Employee pays member contribution
457 Deferred Compensation	All contributions to be made by employee
Management Benefit	2.5% of annual salary
Cell Phone Allowance	\$110 per month
Medical, Dental, and Vision Insurance	Medical – monthly cafeteria benefit paid by SANDAG Dental and Vision – premium for employee-only coverage paid by SANDAG; dependent coverage available
Paid Holidays	11 observed holidays and 2 floating holidays
Paid Time Off (PTO)	28 days (224 hours) annually
PTO Cash-out	Up to 80 hours annually
Short- and Long-Term Disability Insurance	Up to \$2,500 per week for Short-term disability benefits; up to \$15,000 per month for Long-term disability benefits
Life/AD&D Insurance	\$200,000 in coverage
Executive Health Program	Up to \$6,000 per year
Relocation	Up to \$10,000 for reasonable moving expenses
Professional Development	Up to \$7,000 each year for expenses related to continuing education, training, professional memberships, and certification.