Los Angeles County Metropolitan Transportation Authority

Orange County Transportation Authority

Riverside County Transportation Commission

San Bernardino Associated Governments

Ventura County Transportation Commission
# ROSTER

## LEGISLATIVE & COMMUNICATIONS COMMITTEE

<table>
<thead>
<tr>
<th>COUNTY</th>
<th>MEMBER</th>
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</table>
| **Los Angeles:** | Don Knabe (Chair)  
1 Vote  
Supervisor, 4th District  
County of Los Angeles |
| **Orange:** | Michael Hennessey (Vice-Chair)  
1 Vote  
OCTA Public Member |
| **San Bernardino:** | Larry McCallon  
1 Vote  
Mayor Pro Tem  
City of Highland  
Alan Wapner  
Mayor Pro Tem  
City of Ontario |
| **Riverside:** | Daryl Busch  
1 Vote  
Mayor  
City of Perris  
Andrew Kotyuk  
Council Member  
City of San Jacinto |
| **Ventura:** | Keith Millhouse  
1 Vote  
Council Member  
City of Moorpark |
LEGISLATIVE AND COMMUNICATIONS COMMITTEE

FRIDAY, March 14, 2014, 9:00 A.M.
LOS ANGELES COUNTY METROPOLITAN
TRANSPORTATION AUTHORITY
UNION STATION CONFERENCE ROOM
ONE GATEWAY PLAZA, 3rd FLOOR
LOS ANGELES, CALIFORNIA 90012

AGENDA DESCRIPTIONS
The agenda descriptions are intended to give notice to members of the public of a brief general description of items of business to be transacted or discussed. The posting of the recommended actions does not indicate what action will be taken. The Committee may take any action that it deems to be appropriate on the agenda item and is not limited in any way by the notice of the recommended action. The Chair reserves the right to discuss the items listed on the agenda in any order.

A person with a disability may contact the Committee Secretary's office at (213) 452-0224 or via e-mail saccocciom@scrra.net at least 72-hours before the scheduled meeting to request receipt of an agenda in an alternative format or to request disability-related accommodations, including auxiliary aids or services, in order to participate in the public meeting. Later requests will be accommodated to the extent feasible.

SUPPORTING DOCUMENTATION
The agenda, staff reports and supporting documentation are available from the Committee Secretary, located at One Gateway Plaza, 12th Floor, Los Angeles, CA 90012 and on the Metrolink website at www.metrolinktrains.com under the Meetings and Agenda link.

PUBLIC COMMENTS ON AGENDA ITEMS
Members of the public wishing to address the Committee members regarding any item appearing on the agenda, may do so by completing a Speaker’s Form and submitting it to the Committee Secretary. Speakers will be recognized by the Chair at the time the agenda item is to be considered. When addressing the Committee, please state your name for the record. Please address the Committee as a whole through the Chair. Please note comments to individual Committee members or staff are not permitted when addressing the Committee. A speaker’s comments shall be limited to three (3) minutes.

PUBLIC COMMENTS ON ITEMS NOT ON THE AGENDA
Members of the public wishing to address the Committee members regarding any item not on the agenda, but within the subject matter jurisdiction of the Committee, will be taken under Item 3 (Public Comment), and will be subject to the same guidelines as noted above.
1. Call to Order
2. Pledge of Allegiance
3. Public Comment

REGULAR CALENDAR

4. Approval of Minutes – February 14, 2014 Legislative and Communications Committee Meeting

Staff recommends the Legislative and Communications Committee approve the minutes of the February 14, 2014 meeting.

5. Contract No. SP386-14 – Communications Support Services – Recommendation for Award – MBI Media

Communications support services are required to support crisis communications and community outreach efforts for the Public Affairs Department. The purpose of the contract is to provide the Southern California Regional Rail Authority (Authority) with general media relations, crisis communications and community outreach support services.

Staff recommends the Legislative and Communications Committee approve and recommend the Board authorize the Chief Executive Officer to award Contract No. SP386-14 for communications support services to MBI Media (MBI) in an annual amount of $100,000. The total not-to-exceed amount is $200,000 for the base term of two years. There are two one-year options. This award is subject to resolution of any protest timely filed. Funds for communications support services are available in the FY2013-14 Operating Budget. Funding for subsequent fiscal years will be requested in future budgets.

6. Update to Fare Policies and Procedures Regarding Complimentary/Trial Ride Tickets

In 2003, the Board adopted Fare Policies and Procedures. At this time, staff would like to provide additional parameters for complimentary/trial ride tickets by updating the policy. This item was presented at the January 14, 2014, Legislative and Communications Committee. At that time, the Committee directed staff to 1) discuss the policy at its upcoming TAC meeting on January 14, 2014 for discussion and 2) Return to the Legislative and Communications Committee at a future meeting to present a revised policy that would incorporate changes to restrictions, if plausible.
Staff recommends the Legislative and Communications Committee approve and recommend the Board adopt the updated Fare Policies and Procedures. There is no immediate budget impact as a result of this policy revision.

7. **SB 953 (Roth) Vehicle Parking on Public Grounds**

Senate Bill 953 introduced by Senator Richard Roth (D-Riverside) expands the definition of public transportation agency to include Riverside County Transportation Commission (RCTC) and authorizes transportation agencies to enforce parking restrictions. Access to reliable parking is essential for Metrolink passengers to access our services. Maintaining a safe and orderly parking lot is also needed for attracting and retaining of customers, therefore enabling RCTC to enforce parking restrictions at their facilities is needed to best serve current and potential Metrolink riders.

Staff recommends that the Legislative and Communications Committee approve and recommend the Board adopt a "Support" position on SB 953. This bill does not have a direct budgetary impact on the Authority.

8. **State and Federal Legislative Update**

Staff will provide an update on current legislative issues in State and Federal Government Affairs. Each month staff provides the Committee with a summary of recent developments emerging from the State Legislature and Congress that are of interest to the agency.

The Committee may receive and file this informational item. There is no immediate budget impact as a result of this update.

9. **Chief Administrative Officer’s Report**
   - Division Update

10. **Chair’s Comments**

11. **Committee Member Comments**

12. **Adjournment**
MINUTES OF THE SCARRA LEGISLATIVE AND COMMUNICATIONS COMMITTEE
February 14, 2014

COMMITTEE MEMBERS IN ATTENDANCE: VOTES

METRO: Richard Katz 1

OCTA: MICHAEL HENNESSEY (Vice-Chair)

SANBAG: PATRICK MORRIS

RCTC: DARYL BUSCH

VCTC: --

STAFF:

MICHAEL P. DePALLO, Chief Executive Officer
PATRICIA BRUNO, Government and Regulatory Affairs Manager
GEOFFREY P. FORGIONE, Associate General Counsel
ROBERT TURNAUCKAS, Chief Administrative Officer
MARY SACCOCCIO, Committee Secretary

Meeting minutes are presented in a format that corresponds with the Legislative and Communications Committee Agenda, which is incorporated herein by reference. Southern California Regional Rail Authority (SCRRA) Legislative and Communications Committee Agendas are available from the Metrolink website www.metrolinktrains.com or by contacting the Committee Secretary at 213-452-0224.

1. Call to Order

The February 14, 2014, Legislative and Communications Committee Meeting was called to order by Vice-Chair Hennessey at 9:00 a.m., in the Los Angeles County Metropolitan Transportation Authority Union Station Conference Room, One Gateway Plaza, 3rd Floor, Los Angeles, California 90012. Vice-Chair Hennessey presided over the meeting in the absence of the Committee Chair Knabe.

2. Pledge of Allegiance

Director Morris led the group in the pledge of Allegiance.

1 Director Katz attended the meeting in the absence of Committee Chair Knabe.
3. Public Comment

Vice-Chair Hennessey inquired if any members of the public wished to address the Committee. With there being no requests to speak, the Public Comment period was formally closed.

REGULAR CALENDAR

4. Approval of Minutes – January 10, 2014 Legislative and Communications Committee Meeting

Upon a motion by Vice-Chair Hennessey and seconded by Director Morris, the Committee approved the minutes of the January 10, 2014 Legislative and Communications Committee Meeting. There being no opposition, the Minutes were approved unanimously.

ACTION: The Legislative and Communications Committee approved the Minutes of the January 10, 2014 meeting.

5. Adoption of the 2014 Federal and State Legislative Program

Patricia Torres Bruno, Government and Regulatory Affairs Manager, and Jennifer Cohen, Government Relations Administrator, delivered a presentation and provided a brief background on this item as detailed in the staff report and requested approval of staff’s recommendation. Patricia Torres Bruno stated adoption of the legislative program establishes the Authority’s priorities and guides advocacy efforts in both Sacramento and Washington, D.C.

Questions were raised by Director Morris regarding whether the proposed legislative agenda was vetted with the Technical Advisory Committee (TAC) and the format it was provided in. He also inquired how much dialog existed between staff and members of the TAC committee.

Patricia Torres Bruno responded that the program was forwarded to the TAC Committee members via email and no responses were received from the members although she did receive responses from member agency’s legislative staff that provided input on the legislative platform. She stated that Authority staff works very closely with the legislative staff from the member agencies on their lobbying efforts.

Director Busch asked whether the TAC members are communicating back to staff as well. Director Katz also inquired if the TAC members responded directly back to staff’s e-mails. Patricia Torres-Bruno replied that her communication was with both TAC and legislative staff who coordinate with the TAC members and that she did not receive any specific e-mails on this item directly from TAC members but did from legislative staff and is aware TAC members frequently communicate through the legislative staff.
Jennifer Cohen then outlined the issues staff and the legislative advocates will be closely monitoring on the state side. These topics included High Speed Rail, Safety Security and Positive Train Control (PTC), Environmental Sustainability, Pension Reform and the Enhanced Role of Transit in Southern California.

On discussion regarding High Speed Rail, Director Morris commented on the Memorandum of Understanding (MOU) between the Southern California Association of Governments (SCAG) and the California High Speed Rail and inquired if the funding for the Authority’s Tier 4 locomotives would come from this agreement. Jennifer Cohen responded that funding for the Tier 4 Locomotive was allocated from the Connectivity pot of funding, which is from a different source than SCAG’s MOU.

Director Morris asked if these MOU-related funds have been actualized by the Authority. Jennifer Cohen responded that she was not certain if any of those funds had been deposited into an account in Southern California, and noted that distribution of those fund was delayed due to ongoing litigation. Patricia Torres Bruno noted the Authority has actualized the connectivity dollars. The Authority’s allocation through the California Transportation Commission (CTC) process is $130 million per formula which helps fund PTC and Tier 4 locomotives. The CTC released $8.5 million early in February, however that $9 billion that is subject to ongoing legislation is still being held up.

Director Morris inquired what the Authority’s net benefit will be from the $9 billion base. Patricia Torres Bruno responded that $1 billion is allocated from the SCAG MOU with High Speed Rail and Southern California agencies to improve existing regional rail systems that can serve the future high speed line. She stated $500 million was appropriated in the budget for spending, but due to ongoing litigation that funding had not been actualized.

Vice-Chair Hennessey sought clarification that the bulk of the project funding is aimed at projects to improve the Antelope Valley Line. Patricia Torres Bruno confirmed and stated the envisioned project will provide direct connections to high speed rail. She stated the number one project for the Southern California region is the SCRIP project that will run tracks through Los Angeles Union Station.

During discussion on pension reform, Director Morris inquired about the current status of the lawsuit filed by the Sacramento Regional Transit District. Jennifer Cohen stated she did not know if resolution to this lawsuit had been reached, but she would research it and report back to the Committee.

Patricia Torres Bruno continued on with the presentation outlining the issues that staff and advocacy lobbyists would be closely monitoring on the federal side as outlined in the staff report.
In regards to Positive Train Control (PTC), Patricia Torres Bruno reported staff would continue to advocate for the appropriate resources dedicated to PTC on a national level as well as locally to the Authority. Staff anticipates that proposals seeking to delay the 2015 federal mandate implementation deadline would be submitted. However, the industry has been reevaluating their position on PTC due to the unfortunate Metro-North incident. Staff would continue to oppose any delays.

Director Morris asked of Michael DePallo, Chief Executive Officer, if a policy shift was noted at the Commuter Rail Systems CEOs meeting he attended following the Metro-North incident. Michael DePallo responded that as a result of the Metro-North incident, the industry’s CEOs are now open to reconsidering support of the current mandated deadline with exemptions individually granted by the Secretary for railroads that are not able to meet the current deadline. Director Morris stated that it was his understanding that this would not be a universal extension, but rather an individually negotiated extensions. He stated the interoperability has been a continuing topic and there is now discussion about alternatives to the PTC model. He asked staff to define what American Public Transportation Association (APTA’s) position was on this issue. Patricia Torres Bruno responded with regards to interoperability that the proposal is still missing some language. Staff will propose adding “interoperable” to the first paragraph and to ensure that interoperable standards are met. She noted staff has been engaging in discussions with legislative staff from various agencies in an attempt to add language to the current proposal on interoperability so that it can be moved forward at the March APTA meeting.

Director Katz commented that without interoperability, individual safety systems would be created which defeats the main purpose of PTC. The Authority’s position from a safety standpoint has consistently been “the equivalent or greater” from a safety standpoint in interoperability.

Director Morris also noted that he was concerned about the $10 million in operational costs that accompanies PTC implementation and noted that federal grants are typically awarded for capital projects not for operation. He asked if staff could move forward with a legislative solution due to the nature of this highly intricate and costly system to assist the Authority in defraying some of these costs. Patricia Torres Bruno responded that she has discussed with APTA members the high financial costs the Authority will face as they transition into operating PTC. She discussed the need to incorporate funding that is flexible for capital and operations projects, but noted that there was push back to her suggestion.

Director Morris inquired if a case for operational funding could be made on the basis that the Authority was the first agency to implement PTC and expended the costs associated with that task. He noted that through the Authority’s efforts, the model will allow other agencies to implement systems quickly and with less costs. In this regard, operational funding could be a consideration to at least help the Authority absorb the operating costs over the next 5 to 10 years.
Director Katz stated there are two avenues in which a case could be made for operational funding. One is in the PTC allocations and also in the Moving Ahead for Progress in the 21st Century (Map-21) reauthorization. He stated Congressman Shuster’s committee has begun MAP-21 discussions and he stated that our delegation should begin working to include the addition of PTC funding needs to this discussion. Michael DePallo added that placing a time limit, for example 5 years, in which funding would be gradually allocated and providing an end date would increase the chances of obtaining operational funding.

Vice-Chair Hennessey stated that as part of the on-boarding process for new board members he felt it would be valuable for them to engage in conversation with those board members and other first responders who worked or responded to those first calls regarding the Chatsworth incident. He suggested that staff prepare a video interview to record the history from those first responders in an effort to add depth of understanding not only to the events of that day but to better understand the safety needs of the railroad. He recounted a conversation he had with Director Millhouse, who was the Board Chair during the incident, which helped to give him a deeper understanding about the scope of the disaster. Jeff Lustgarten, Director, Public Affairs stated that he was awaiting approval of a contract award for photography and video services that could address this task and would ensure that the suggestion from Vice-Chair Hennessey was addressed.

Patricia Torres Bruno then reported the Commuter Tax Benefit has lapsed and is set to be reduced from $245 per month to $130 per month, noting that this benefit was a critical incentive for employers which staff was lobbying strongly on with its delegates for an extension. Director Morris commented that staff should also engage in data gathering to substantiate the negative impact on ridership this reduction will have on the Authority when making a case for commuter tax benefits. Patricia Torres Bruno stated staff has included in their written communications, data to support the impact to the Authority and noted staff would update this data now that the benefit has lapsed.

A copy of the presentation is available upon request from the Committee Secretary.

Upon a motion by Vice-Chair Hennessey and seconded by Director Morris, the Committee approved staff’s recommendation. There being no opposition, the motion passed unanimously.

ACTION: The Legislative and Communications Committee approved and recommended the Board adopt the 2014 Federal and State Legislative Program.

6. Communications Update

Jeff Lustgarten, Director, Public Affairs, delivered a presentation that highlighted recent key communications events and reported on upcoming initiatives. These highlights included:
- January 26, 2013 Big Boy Event - the move of the Union Pacific’s Big Boy No. 4014 took place at the FairPlex and Covina Station. Union Pacific will be restoring the 115 year old locomotive in preparation for a road show. Metrolink assisted Union Pacific in the cut over. A photo opportunity at the Metrolink Covina Station was largely received with over 700 attendees and media.

- January 28, 2014 Central Maintenance Facility Community Working Group Event - Metrolink representatives along with San Bernardino Mayor and Board Chair, Patrick Morris participated in a working group meeting in Cypress Park. The meeting addressed the comments received from the surrounding community on the Authority’s Draft Health Risk Assessment. He reported that another community meeting would be held later in the month in Elysian Park.

- February 1, 2014 Lunar New Year Event –The Authority’s ridership doubled system-wide during the event that took place in Downtown Los Angeles. Orange County Transportation Authority (OCTA) also promoted the event and hosted a pre-event celebration at Irvine Station.

Director Busch asked if the increased ridership during the Lunar New Year event could be attributed to the Weekend Day Pass ticket. Jeff Lustgarten replied that the Weekend Day Pass was an incentive for riders to take Metrolink to the event. He also stated that staff promoted the event through Facebook and Twitter which brought a great deal of awareness to the public.

Jeff Lustgarten provided some highlights from the current Metrolink Matters publication as well as the Authority’s support of Recent and Upcoming Promotions which included:

- National Train Day/Union Station Anniversary – May 2014
- Auto Club Speedway – March 2014
- Perris Valley Line Groundbreaking – February 21, 2014
- San Bernardino Railroad Days – March 2014
- SANBAG/Santa Fe Depot Groundbreaking – February 26, 2014

He also announced a press conference event would be held on February 20, 2013 to promote the inauguration of the revenue service demonstration of PTC.

A copy of the presentation is available upon request from the Committee Secretary.

**ACTION:** The Legislative and Communications Committee received and filed this report.

7. **Chief Administrative Officer’s Report**

Robert Turnauckas, Chief Administrative Officer reported on the following:
• Rail2Rail Agreement – Metrolink is continuing to working with Amtrak and Caltrans on the Rail2Rail Agreement. Amtrak and Caltrans are preparing their recommendations and suggestions that they would like to see the Authority move forward with. The Agreement is currently being reviewed by legal counsel for Amtrak and Caltrans and as soon as it is received it will be vetted through the TAC. The new bar code added to the Monthly Pass tickets is providing hard data on Metrolink ridership aboard Amtrak trains. The last four months have provided the following ridership numbers: October 2013 - 39,000; November 2013 - 31,000, December – 2013 - 21,000, and January 2014 – 42,000.

• Staff is meeting with Metro in the following week to begin drilling down the data for the TAP program. Adequate data has been collected to begin forecasting for next year’s budget for those Metrolink riders that are transferring to the light rail system.

• March 3, 2014 will launch enforcement of the Personal Care Assistant (PCA) Card.

8. Chair’s Comments
   There were no additional comments from Vice-Chair Hennessey at this time.

9. Committee Member Comments
   There were no additional comments from Committee Members at this time.

10. Adjournment
   There being no further business for consideration by the Committee, the meeting was adjourned at 10:00 a.m.

Respectfully submitted,

Mary Saccoccio
Committee Secretary
TRANSMITTAL DATE: March 7, 2014

MEETING DATE: March 14, 2014

TO: Legislative and Communications Committee

FROM: Lia McNeil-Kakaris, Assistant Director, Contracts and Procurement

SUBJECT: Contract No. SP386-14 – Communications Support Services – Recommendation for Award – MBI Media

Issue

Communications support services are required to support crisis communications and community outreach efforts for the Public Affairs Department.

Recommendation

Staff recommends the Legislative and Communications Committee approve and recommend the Board authorize the Chief Executive Officer to award Contract No. SP386-14 for communications support services to MBI Media (MBI) in an annual amount of $100,000. The total not-to-exceed amount is $200,000 for the base term of two years. There are two one-year options. This award is subject to resolution of any protest timely filed.

Alternatives

The Committee may:
1) Modify the amount of the contract funding authorization; or
2) Decline to award the contract and direct staff to re-issue the Request for Proposal (RFP).

Background

The purpose of the contract is to provide the Southern California Regional Rail Authority (Authority) with general media relations, crisis communications and community outreach support services. The contractor will support the Public Affairs Department in providing an assortment of communications activities, including media relations, media training, updates to the crisis communications plan, and staff support (if needed) in the event of incident response. They will also be able to provide the Authority with support for its community outreach needs, including Title VI-related public outreach efforts which involve both written and oral translation services. These services are currently performed under Contract Nos.
Procurement Approach

On September 13, 2013, the Board approved evaluation criteria for the procurement of communications support services. Staff issued the Request for Proposal (RFP) on October 18, 2013. The RFP was posted on the Authority’s e-procurement website and notices were sent directly to firms registered on the Authority’s online vendor database. The RFP was also advertised in publications in the five member counties. Fifty-four firms downloaded the solicitation. Eight firms attended the pre-bid conference held on November 12, 2013. Three proposals were received on December 13, 2013. Proposals were received from California Strategies, MBI Media and VMA Communications, Inc. The evaluation team consisted of the Authority’s staff from Public Affairs and an outside evaluator from a member agency.

The technical proposals for all three firms were evaluated and scored in accordance with the Board-adopted Contract and Procurement Policies and Procedures CON-13, Proposal Evaluation. All three firms achieved the minimum technical score of 33 and were interviewed and evaluated on cost. The result of the combined technical, interview and cost scoring is shown below:

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<th>Technical Score</th>
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<tr>
<td>MBI Media</td>
<td>45.0</td>
<td>23.2</td>
<td>18</td>
<td>86.2</td>
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<tr>
<td>California Strategies</td>
<td>42.9</td>
<td>19.2</td>
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<td>80.1</td>
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<td>VMA Communications, Inc.</td>
<td>41.5</td>
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<td>14</td>
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MBI was ranked highest because they demonstrated the best ability to provide crisis communications, media relations and community outreach services, as well as their unique understanding of the Authority’s operations and safety issues. As the incumbent Consultant, MBI has previously developed a series of safety videos, facilitated media training and helped develop table top exercises to game plan for various crisis scenarios. They also have a thorough understanding of the Authority’s core messaging. Finally, MBI has more than 25 years of experience providing similar communications services to both transit and public agency clients, including Los Angeles County Metropolitan Transportation Authority, Riverside County Transportation Commission, Orange County Transportation Authority, Omnitrans, Operation Lifesaver, Alameda Corridor Transportation Authority and Burlington Northern Santa Fe.

In accordance with Board-adopted Contract and Procurement Policies and Procedures CON-5, Cost and Price Analysis, an analysis of the proposed pricing was found to be reasonable.
Therefore, staff recommends the Legislative and Communications Committee approve and recommend the Board approve and authorize the Chief Executive Officer to award Contract No. SP386-14 to MBI Media in an amount not to exceed $200,000 for the base term of two years.

**Budget Impact**

Funds for communications support services are available in the FY2013-14 Operating Budget. Funding for subsequent fiscal years will be requested in future budgets.

Prepared by: Jeff Lustgarten, Director, Public Affairs  
Jon Bischetsrieder, Senior Contract and Compliance Administrator  
Lia McNeil-Kakaris, Assistant Director, Contracts and Procurement

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<th>Chief of Marketing and Communications Officer Approval:</th>
<th>Associate General Counsel Approval:</th>
<th>Chief Executive Officer Approval:</th>
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Issue

In 2003, the Board adopted Fare Policies and Procedures. At this time, staff would like to provide additional parameters for complimentary/trial ride tickets by updating the policy.

Recommendation

Staff recommends the Legislative and Communications Committee approve and recommend the Board adopt the updated Fare Policies and Procedures.

Alternative

The Committee may choose to reject or make changes to the proposed Policy.

Background

In 2003, the Board approved Fare Policies and Procedures to govern ticket distribution including complimentary/trial ride tickets.

Ten years have passed since this policy was adopted, staff worked to add additional detail and procedures to help manage complimentary/trial ride ticket use. The policy incorporates many of the standards and best practice criteria from other comparable services from transit agencies nationwide.

This item was presented at the January 14, 2014, Legislative and Communications Committee. At that time, the Committee directed staff to 1) discuss the policy at its upcoming TAC meeting on January 14, 2014 for discussion and 2) Return to the Legislative and Communications Committee at a future meeting to present a revised policy that would incorporate changes to restrictions, if plausible.

The main purpose of this revision is to provide parameters for the distribution of complimentary/trial ride tickets to ensure consistency and tracking. The Authority would allow for the distribution of complimentary/ trial ride tickets for Quality Service Pledge and marketing purposes only by Authority staff and member agencies. Furthermore, Member
Agencies often utilize complimentary/trial ride tickets to assist in marketing efforts on behalf of the Authority. This revision would establish the process to handle those requests.

Attachment 1 includes a redline version showing the changes made to the Fare Policies and Procedures. Attachment 2 includes the current version of the document.

**Budget Impact**

There is no immediate budget impact as a result of this policy revision.

Prepared by: Mark Waier, Manager, Marketing and Sales
Robert Turnauckas, Chief Administrative Officer
Southern California Regional Rail Authority

Metrolink

Fare Policies and Procedures

Adopted September 26, 2003
Revision 1 July 1, 2004
Revision 2 July 1, 2005
Revision 3 July 1, 2007
Revision 4 July 1, 2010
Revision 5 July 1, 2011
Revision 6 July 1, 2012
Revision 7, July 1, 2013
Revision 8, January 10, 2014
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Southern California Regional Rail Authority

Fare Policies and Procedures

Purpose

This document outlines the fare policies and operational practices adopted by the SCRRRA Board of Directors on September 26, 2003, and updated to reflect Board-approved fare changes in July 2004, 2005, 2007, 2010, 2011, 2012 and 2013. Fare policies and procedures on the Metrolink system are governed solely by the SCRRRA Board of Directors and may be modified at any time. The term “ticket” is used throughout to incorporate all types of fare media valid for travel on Metrolink trains unless a specific ticket type is noted with conditions pertinent to that payment medium.

Proof-of-Payment System

Metrolink operates on a proof-of-payment system in which every passenger (unless otherwise noted in this fare policies and procedures document) is required to possess a valid Metrolink ticket prior to boarding the train. Tickets are not sold on board the trains.

Fare verification may be performed on board any train by Metrolink conductors, Los Angeles County sheriff deputies, Los Angeles County Sheriff’s Department Law Enforcement Technicians (LETs), and Customer Engagement Representatives. All passengers are required to provide proof of ticket purchase and valid identification to allow eligibility verification when requested by the fare verifiers. Fare inspections will be performed regularly and randomly to verify that passengers are in possession of valid tickets. Passengers without a valid ticket are subject to citation and fine in accordance with California Penal Code Sections 587c and 640b. Passengers who refuse or are unable to produce a valid ticket may be asked to produce valid identification including name and current address.

Distance Based Fares (Fare Restructuring)

In April 2004, the Metrolink Board of Directors adopted a fare-pricing structure, based on driving mileage between stations. The structure was implemented in July 2005. This driving mileage-based fare structure levies a charge determined by the driving distance between the origin station and destination station. The
Metrolink Board of Directors adopted this fare structure to develop and implement consistent and equitable pricing so that customers traveling the same distances pay the same price, and short trips cost less than long trips.

To implement this pricing structure, the Board approved a plan to phase in restructuring over a ten-year period with annual fare adjustments to minimize the incremental price increase for any one customer.

The formula to calculate ticket prices includes four elements: a base fare boarding charge for all tickets, the ticket type multiplier, a transfer fee and a mileage charge for the distance traveled. Each of the four Metrolink ticket types has a unique base fare charge and ticket type multiplier. For instance, the monthly pass ticket multiplier is 32.; the round-trip ticket multiplier is 2; and it is 1 for the one-way ticket. Using this formula, the monthly pass is the best value – offering the lowest price per trip.

The miles between stations are calculated using the shortest driving miles from origin to destination station. Given the unique linear and parallel configuration of various Metrolink routes, there is one exception to the driving mile equivalent calculation for interlined trips. Interlined trips that have very short driving miles (or miles shorter than the longest train leg) pay the longest distance driving mile train leg. For example, Claremont to downtown Pomona is five miles driving, but to get to downtown Pomona from Claremont on the train, the trip requires traveling into Union Station, transferring, and riding to downtown Pomona. As a result, the fare for this trip is based on the driving miles from Claremont to Union Station (32 miles) – which is the longest distance driving mile train leg (downtown Pomona to Union Station is 30 miles).

There is no maximum mileage charge for the distance traveled for one-way, round-trip and 7-Day tickets. The maximum cap for a monthly pass is 80 miles.

In 2012, the Board of Directors waived the requirement to restructure for the 2011 calendar year and extended the deadline to complete restructuring by 2015.

Reference Fare Policies and Procedures Board Actions Chronology for restructuring phases.

**Ticket Types**

- **One-Way Tickets**

One-way tickets are valid for one trip only, defined as continuous travel from the origin station to the destination station specified on the ticket. One-way trips
must be completed within three hours after purchase of ticket on the day of purchase - the expiration time and date is displayed on the ticket. Types of one way tickets sold: adult, senior/disabled/medicare, student, military and youth.

Future dated one-way tickets do not need to be completed within three hours after purchase and are valid on the date that is printed on the front of the ticket. Future dated tickets may be purchased one year in advance.

- **Round-Trip Tickets**

Round-trip tickets are valid for two trips only, from and to the origin station and the destination station marked on the ticket. The first leg of a round-trip ticket is valid for three hours from purchase. The return ticket is valid for travel anytime on the same day as the first leg of the trip or until 3:00 a.m. the following day. Types of round-trip tickets sold: adult, senior/disabled/medicare, student, military and youth round trip Tickets are priced to equal two one-way tickets.

Future dated round-trip tickets do not need to be completed within three hours after purchase and are valid on the two dates printed on the ticket. Future dated tickets may be purchased one year in advance.

- **7-Day Pass**

The 7-Day Pass is valid for unlimited travel between origin and destination stations for seven consecutive days within the date range printed on the front of the ticket. The 7-Day pass launched on July 1, 2012 and is priced at 3.5 round-trips. Types of 7-Day passes sold: adult, senior/disabled/medicare and student.

- **Weekend DAY Pass**

The Weekend DAY Pass is valid on all operating Metrolink lines on EITHER Saturday or Sunday. for the weekend date printed on the front of the ticket. There are no additional discounts that apply to this ticket type.

- **Monthly Pass**

Monthly passes are valid for unlimited travel between the origin station and destination station printed on the pass during the calendar month. A Monthly Pass allows for unlimited systemwide weekend travel starting at 7:00pm on Friday through 11:59pm on Sunday. Types of monthly passes: adult, senior/disabled/medicare, and student.
- **Group Tickets and Vouchers**

Group tickets are sold through Metrolink administrative offices on a reservation basis for non-rush hour and weekend trains. Metrolink distributes tickets or vouchers to the group traveling. Tickets/vouchers are valid for travel on the day printed on the ticket/voucher only, between the specified origin and destination stations. The criteria for group sales include:

- 15 or more persons, with a maximum of 50
- $12.00 per person round trip (same day travel)
- Group ticket is valid for transfer to connecting transit
- Group vouchers are not valid for transfer to connecting transit
- Reservations are required 21 days prior to travel; advance notice must be received 14 days prior to travel
- Three children age 5 and under may travel free with an adult using a valid ticket
- Group ticket is valid for travel only on non-rush hour or on weekend trains
- Group sales tickets are nonrefundable and nontransferable
- A $2.50 handling fee is charged per group order in addition to the $12 per-person price. The price of the group ticket is indexed to the future systemwide fare increase and will be implemented each time the cumulative systemwide increase would result in a $1 increase in the group ticket.

- **School Group Tickets**

School group tickets are available by reservation through the Metrolink administrative office. The tickets are provided to the school group in voucher form, indicating the boarding and alighting stations, the date, time and specific trains for the school group. Additional policies include:

- Per person cost is $1.50 one-way and $3.00 round trip
- Minimum group size is 15, maximum is 130 (limited by train capacity, exceptions are granted at the discretion of the CAO)
- Transfers to connecting transit are not included
- Minimum chaperon-to-student ratio of 1:5 is required
- Chaperons must agree to and sign Metrolink Safety Guidelines
- Reservations must be received four weeks prior to travel; advance payment must be received three weeks prior to travel
- Travel limited to off-peak trains
**Student Fares**

Student fares are available to individuals who have valid student identification. These tickets can be purchased through Ticket Vending Machines. Student one-way, round-trip, 7-day and monthly passes are discounted 15% from the adult fare. A valid student identification card must be presented to the fare inspector upon request.

**Military Fares**

Military Discount: one-way and round-trip tickets are discounted 10% for active military who have a valid Common Access Card (CAC).

**Youth Fares (Weekend Only)**

For passengers ages 6 to 18, the youth fare is only available during the weekends. The fare is 25% off the adult weekday fare on one-way and round-trip tickets. There is no weekday youth fare. Youth fare discounts are not available on 7-Day passes and monthly passes.

**Fares for Children**

Three children ages 5 years and under may ride free of charge with each adult parent or guardian using a valid ticket. Each additional child is charged the youth fare for weekend travel or the adult fare for travel during weekdays.

**Fares for Seniors**

For passengers 65 and older, the fare is 25% off the adult fare for 7-Day pass and monthly passes. One-way and round-trip tickets are 50% off the adult fare.

**Senior Citizen Identification**

Customers purchasing a reduced senior citizen fare for Metrolink services shall carry proper photo identification cards indicating their age as 65 or older. ID cards must be shown to the fare inspector upon request.

**Fares for Persons with Disabilities**

For passengers with a disability, the fare is 25% off the adult fare for 7-Day and monthly passes. One-way and round-trip tickets are 50% off the adult fare.
One personal care attendant for a person with a disability may ride for free until the new Metrolink Personal Care Attendant Identification Card is implemented. A person with a disability that is eligible to have a personal care attendant, must obtain an identification card for each PCA that accompanies them. The first PCA ID card is priced at $25 and every subsequent PCA ID card is priced at $15 for applications that are submitted together.

**Persons with Disabilities Identification**

Passengers using a reduced fare ticket for people with disabilities shall carry proof of eligibility. One of the following eligibility cards must be shown to the fare inspector upon request:

- Los Angeles County Transit Operators Association Card (LACTOA)
- Medicare ID card, which is red, white and blue.
- Identification card from other transit agencies - any current valid identification card issued to any person with a disability by other transit agencies within the United States shall be honored.
- DMV placard identification card.
- Access Services Inc. clients may ride Metrolink with valid photo Access Services identification in lieu of Metrolink fare media.

**Law Enforcement Officers**

Metrolink allows uniformed law enforcement officers to ride free of charge if the officer meets all of the following criteria:

- Has peace officer status under California Penal Code 832
- Presents their valid photo ID card issued by their law enforcement agency during regular fare inspections or at the request of any Metrolink fare verifier.
- Wears a Class A agency-authorized uniform that includes an agency ID card, metal badge, baton and holder, metal name plate, rank insignia on uniform shirt, service weapon, gun belt and holster.

This fare-exempt policy is restricted to law enforcement officers wearing a Class A uniform only. Class B uniforms are not acceptable which include, but are not
limited to:
• Raid jackets
• Flight suits or jump suits
• Polo or golf shirts
• Washable cotton/polyester blend uniforms similar in appearance to a Class A uniform.

In addition, Metrolink requires law enforcement officers who are riding free under this policy to:
• Take appropriate law enforcement action when they observe criminal activity or when asked by a citizen or Metrolink employee
• Respond accordingly in the event of a rail-related incident or accident
• Relinquish their seat to a paying customer on crowded trains

Transfers to Other Transit Services

The Metrolink fare structure includes a transfer to participating connecting transit operator services, thus allowing for a seamless transfer from Metrolink to other transit services. Metrolink has entered into transfer agreements with area transit operators to make it easy for customers to use bus and other rail services by simply presenting their Metrolink ticket to the driver of the connecting transit.

Transfers to most connecting transit at Metrolink stations, including most bus routes, and all stations on the Red Line, Blue Line, Green Line, Purple Line, Expo Line, Orange Line and Gold Line, are free for Metrolink customers with a valid Metrolink ticket. Metrolink riders who transfer to Metro Rail in LA County must tap a turnstile or validator at the Metro Rail stations. Taping an expired Metrolink ticket is a violation of this policy and could result in a citation. Valid fare media include monthly passes for the current month; 7-day pass, weekend day pass, one-way and round-trip tickets for same day travel only – the day printed on the ticket, and validated 4-trip/2-trip tickets for the same date only that is printed on the ticket.

4-trip/2-trip tickets must be validated for that day of travel; 4-trip/2-trip ticket holders boarding other transit service prior to validating their Metrolink ticket are required to pay the fare of the connecting transit.

Some additional restrictions and transfer charges may apply to specific
connecting transit operators in accordance with the individual transfer agreements.

Ticket Sales Locations

All Metrolink stations have Ticket Vending Machines (TVMs) that sell all ticket types except 4-trip/2-trip tickets, and group travel tickets/vouchers. Other ticket sales locations include:

- Union Station ticket sales offices
- Pass-By-Mail available through the Metrolink administrative office
- Corporate partners business locations
- Retail sales outlets such as transit stores, selected city halls, malls, and building-based sites

Corporate Partner Program

Monthly passes, 7-Day, RT tickets for employees of participating corporations are sold on consignment and through the Corporate Quick Card. Tickets are sold to participating companies through the Metrolink administrative office. Metrolink is reimbursed the full cost of the tickets that the corporation distributes. The participating corporate partner is responsible for distribution of the tickets/passes or Corporate Quick Card to their employees and for receipt of any co-payments by the employee.
Special Fare Regulations

Multi-Line tickets and reciprocal stations: 1) Tickets for either the San Bernardino Line or Riverside Line are valid for travel between stations of equal or lesser distance on either line. 2) Tickets on the Riverside Line, the 91 Line or the IEOC Line are valid for travel between stations of equal or lesser distance on any of these routes if the origin or destination station is in Riverside County or San Bernardino County.

Connecting Stations: Connections between Metrolink trains can be made at Los Angeles Union Station, downtown Burbank, Fullerton, Glendale, Orange, Riverside, San Bernardino, San Juan Capistrano, Santa Ana and Tustin.

See diagram to the right.
Service Animals

Service animals traveling with passengers with disabilities shall be transported without additional charge.

Service animals in training are permitted on trains. Trainers of service animals are fare exempt when engaged in training activities.

Other Animals

A passenger may carry a small dog or other pet enclosed in a suitable animal carrier or crate that fits on the passenger’s lap or under the seat.

Special Promotional Tickets and Discounts

Metrolink may establish unique promotional fares and tickets for special trains, charter trains, promotions and discounts to encourage ridership. Special promotional tickets may be sold at special events or stations for unique promotions. Special promotional fares include, but are not limited to: discount coupons, two-for-one specials, four friends ride free, promotional seven day passes, 4-trip tickets, round-trip special ticket, and other discounts. The Board of Directors has delegated the authority for approval of new promotional ticket and discount programs to the chief executive officer.

4-trip/2-trip tickets are special free promotional tickets that are not available to the general public and are not sold through Ticket Vending Machines. 4-trip/2-trip tickets are valid for four/two one-way trips to anywhere on the Metrolink system. 4-trip/2-trip tickets must be validated for each trip prior to boarding the train and each trip must be completed within three hours after validation of the ticket. 4-trip/2-trip tickets are valid only until the expiration date printed on the ticket. Multiple riders may use the 4-trip/2-trip ticket provided there is one validation for each person that uses the ticket for each trip.
Complimentary/ Trial Ride Tickets

This section establishes the procedures and requirements governing the distribution of complimentary/trial ride tickets. SCRRA distributes a limited number of complimentary/trial ride tickets each year. SCRRA uses complimentary/trial ride tickets for two principal purposes. First, to improve or enhance customer service as measured by our Quality Service Pledge, and second, as a marketing tool to increase ridership and/or promote services. As noted below, SCRRA employees are strictly prohibited from receiving complimentary/trial ride tickets for personal use or personal distribution.

Ticket Distribution to the Public

Complimentary trial ride tickets are provided to authorized SCRRA employees who obtain approval from their direct supervisor for distribution to passengers. Such employees must submit a completed complimentary/trial ride Fare Media Request Form to obtain tickets. This form requires, among other things, a description of the event or purpose to justify the distribution, as well as the employee’s supervisor or manager’s authorization.

Employees who receive the proper authorization may distribute complimentary/trial ride tickets for the following purposes:

1. **Improve customer satisfaction.** In the event that a Metrolink customer has an experience that falls below the specifications of the Quality Service Pledge, an authorized staff member may offer a complimentary/trial ride ticket to redress any legitimate customer dissatisfaction.

2. **Promote SCRRA’s services.** In order to promote SCRRA services, Staff may distribute complimentary/trial ride tickets to individuals targeted through a specific marketing promotion or campaign by, for example, providing an introductory experience to potential new customers or educating customers as to SCRRA’s services.

SCRRA Employees who receive complimentary/trial ride tickets are responsible to distribute those tickets in accordance with this policy. Under no circumstances may employees receive complimentary/trial ride tickets for personal use or personal distribution. Misuse or unauthorized distribution of these tickets is subject to disciplinary action including, but not limited to, employment termination.
**Ticket Distribution to Board Members**

At the beginning of his/her year term on the Board, each Board member and alternate receives one SCRRA identification card. The Board member and alternate may use their identification card to travel on SCRRA’s trains. This identification card is issued to cover public transit costs incurred as part of their official duties in SCRRA’s service area. Board members and alternates are encouraged to use Metrolink service to attend board/committee meetings and in the process, test the efficacy of SCRRA’s service. This identification card is non-transferable and SCRRA will collect this identification card when each Board member and alternate ceases service on the Board.

Individual Board members and alternates may not receive complimentary/trial ride tickets for personal distribution for any reason, nor may Board members and alternates receive complimentary/trial ride tickets (including any media sometimes identified as a “lifetime ticket”) at any time after conclusion of their service on the Board except in accordance with this policy.

**Ticket Distribution to Member Agencies**

Member Agencies may request complimentary/trial ride tickets to promote SCRRA services consistent with this policy. The Member Agency must obtain approval from SCRRA’s Manager, Marketing and Sales by submitting the Member Agency Fare Media Request Form. Qualified Member Agency staff may distribute complimentary/trial ride tickets to individuals targeted through a specific marketing promotion or campaign as per this policy. Member Agencies are required to track the distribution of complimentary/trial ride tickets.

**Ticket Inventory Control**

The Fare Collection Department manages the inventory of complimentary/trial ride tickets. Ticket management includes ordering and tracking the tickets in numerical sequence in a control log.

**Quality Service Pledge (QSP)**

When average on-time performance of a line falls below 80% for a calendar month, SCRRA will sell a line-restricted (no reciprocity rights) monthly pass at a discount of 25% valid in a subsequent month after the average monthly on-time performance on the line was below 80%. (Where reciprocity/multi-line ticket
rights are available, a full price monthly pass will also be available for purchase). A train is defined as “on time” when it arrives at its end point five minutes or less than the scheduled arrival time.

The monthly on-time performance of a line is calculated within three working days of the end of the month. Discount sales begin on the 15th of the month and continue through the 14th of the following month when the offer would expire. For example, poor on-time performance in March would trigger sale of a discount May monthly pass during the sales period in April. Discount passes are sold through the Pass-by-Mail and CPP programs, from ticket windows at Union Station and in the TVMs as a special ticket. Ticket sales through the TVM require a 60 day programming period.

- **Extensive Delay: One-Time Incident**

  An extensive delay is a delay to riders exceeding one hour from the published train schedule. Upon request, with proof of pass ownership, a monthly pass holder is eligible to receive a universal 4-trip ticket with a one-year expiration from the date of the incident. One-way, round-trip or 7-Day ticket holders receive a replacement ticket no less than the value of the trip that was extensively delayed. The ticket holder must submit the original ticket(s) to be eligible for replacement ticket.

- **Exclusions:**

  - Train delays caused by:
    - Acts of God and nature
    - Third-party activity such as police and fire authorities or government agencies
    - Alternative transportation providers
    - Temporary operating schedules

- **Sole Authority**

  Metrolink has sole authority to grant exceptions to the compensation policy and reserves the right to deny a claim for compensation that does not meet the criteria herein.

**Ride Promise**

If a passenger misses the scheduled connecting Metrolink train due to Metrolink’s fault, Metrolink will make every attempt to secure alternative transportation for
the rider to his/her destination station. If Metrolink cannot secure alternative transportation within sixty (60) minutes of the missed Metrolink train's scheduled departure time, passengers can be reimbursed for their costs for a rental vehicle or taxi, not to exceed $50.00 per passenger. Reimbursement is based on the passengers’ submission of their original dated receipt from the transit provider (taxi driver, car rental company, etc.).

**Definitions**

**Scheduled Connection:** Ten minutes between a Metrolink train's published arrival time and the connecting Metrolink train's published departure time at the same station.

**Alternative Transportation:** Transportation that replaces regular Metrolink train service. This may include, but it is not limited to another Metrolink train, an Amtrak train, bus, van, taxi or other charter operator, and is at Metrolink's discretion.

**Temporary Operating Schedules:** When Metrolink's published train schedule is modified to allow planned construction work or special event train service.

**Extensive Delay:** Delay to riders exceeding one hour from the published train schedule.

**Ticket Refunds**

Metrolink tickets are nonrefundable and nonreplaceable except in extraordinary circumstances. In certain circumstances, Metrolink will provide a refund for customer’s tickets. Refund requests may be submitted by mail to Metrolink’s administrative offices.

**Special Trains**

Metrolink from time to time operates special trains beyond the standard operating schedule. Unique fares may be established for special trains. These unique fares and tickets may be sold either through the Ticket Vending Machines, by mail or another form. In some instances, such as charter trains, all fares must be prepaid and passengers may not be required to have tickets.
Amtrak Tickets – Rail 2 Rail Program

Amtrak Pacific Surfliner, monthly passes are valid on any Metrolink train, within the origin and destination station limits on their Amtrak ticket as part of the Rail 2 Rail program (some blackout dates apply).

Metrolink monthly pass holders may ride any Amtrak Pacific Surfliner train within the origin station and destination station of their pass.

Any Metrolink fare media valid for travel between Los Angeles Union Station and the Burbank Airport Station is accepted on Amtrak Pacific Surfliner trains in this segment.

Any Amtrak fare media valid for travel between Los Angeles Union Station and Bob Hope Burbank Airport is accepted on Metrolink trains in this segment.

Amtrak Shared Service trains as part of the Rail 2 Rail program will accept all Metrolink ticket types.

Measures and Public Hearing Procedures for Fare Changes

The Federal Transit Administration requires that transit agencies have policies that provide the public an opportunity to comment on proposed changes in fares. The SCRRRA Board has adopted the procedures that provide for a public hearing in the event of proposed changes in Metrolink fares. These procedures for public review include:

- A public hearing
- Public workshops prior to the public hearing
- Publication of a notice describing proposed change in fares in an appropriate newspaper(s) of general circulation
- Placement of public notice brochures onboard trains, and at Customer Service Centers.
- Posting of a public notice on the agency website
- Establishment of avenues to provide comments on proposed changes in fares or service in writing using electronic or more traditional methods such as by mail or fax.
- Consideration must be given to views and comments expressed by the public at such hearings.
**Metrolink Supplemental Instructions**

Additional operational procedures governing fare policy implementation and enforcement are described in the Metrolink Supplemental Instructions published by the Operations Department for train operating crews. The Supplemental Instructions are incorporated by reference into this schedule of fare policies and procedures. The policies enumerated in this Fare Policies and Procedures document take precedence over directives and guidance in the Metrolink Supplemental Instructions publication.
Southern California Regional Rail Authority

Metrolink

Fare Policies and Procedures

Adopted September 26, 2003
Revision 1 July 1, 2004
Revision 2 July 1, 2005
Revision 3 July 1, 2007
Revision 4 July 1, 2010
Revision 5 July 1, 2011
Revision 6 July 1, 2012
Revision 7, July 1, 2013
Revision 8, January 10, 2014
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Southern California Regional Rail Authority

Fare Policies and Procedures

Purpose

This document outlines the fare policies and operational practices adopted by the SCRRA Board of Directors on September 26, 2003, and updated to reflect Board-approved fare changes in July 2004, 2005, 2007, 2010, 2011, 2012 and 2013. Fare policies and procedures on the Metrolink system are governed solely by the SCRRA Board of Directors and may be modified at any time. The term “ticket” is used throughout to incorporate all types of fare media valid for travel on Metrolink trains unless a specific ticket type is noted with conditions pertinent to that payment medium.

Proof-of-Payment System

Metrolink operates on a proof-of-payment system in which every passenger (unless otherwise noted in this fare policies and procedures document) is required to possess a valid Metrolink ticket prior to boarding the train. Tickets are not sold on board the trains.

Fare verification may be performed on board any train by Metrolink conductors, Los Angeles County sheriff deputies, Los Angeles County Sheriff’s Department Law Enforcement Technicians (LETs), and Customer Engagement Representatives. All passengers are required to provide proof of ticket purchase and valid identification to allow eligibility verification when requested by the fare verifiers. Fare inspections will be performed regularly and randomly to verify that passengers are in possession of valid tickets. Passengers without a valid ticket are subject to citation and fine in accordance with California Penal Code Sections 587c and 640b. Passengers who refuse or are unable to produce a valid ticket may be asked to produce valid identification including name and current address.

Distance Based Fares (Fare Restructuring)

In April 2004, the Metrolink Board of Directors adopted a fare-pricing structure, based on driving mileage between stations. The structure was implemented in July 2005. This driving mileage-based fare structure levies a charge determined by the driving distance between the origin station and destination station. The Metrolink Board of Directors adopted this fare structure to develop and implement consistent and equitable pricing so that customers traveling the same distances pay the same price, and short trips cost less than long trips.
To implement this pricing structure, the Board approved a plan to phase in restructuring over a ten-year period with annual fare adjustments to minimize the incremental price increase for any one customer.

The formula to calculate ticket prices includes four elements: a base fare boarding charge for all tickets, the ticket type multiplier, a transfer fee and a mileage charge for the distance traveled. Each of the four Metrolink ticket types has a unique base fare charge and ticket type multiplier. For instance, the monthly pass ticket multiplier is 32; the round-trip ticket multiplier is 2; and it is 1 for the one-way ticket. Using this formula, the monthly pass is the best value – offering the lowest price per trip.

The miles between stations are calculated using the shortest driving miles from origin to destination station. Given the unique linear and parallel configuration of various Metrolink routes, there is one exception to the driving mile equivalent calculation for interlined trips. Interlined trips that have very short driving miles (or miles shorter than the longest train leg) pay the longest distance driving mile train leg. For example, Claremont to downtown Pomona is five miles driving, but to get to downtown Pomona from Claremont on the train, the trip requires traveling into Union Station, transferring, and riding to downtown Pomona. As a result, the fare for this trip is based on the driving miles from Claremont to Union Station (32 miles) – which is the longest distance driving mile train leg (downtown Pomona to Union Station is 30 miles).

There is no maximum mileage charge for the distance traveled for one-way, round-trip and 7-Day tickets. The maximum cap for a monthly pass is 80 miles.

In 2012, the Board of Directors waived the requirement to restructure for the 2011 calendar year and extended the deadline to complete restructuring by 2015.

Reference Fare Policies and Procedures Board Actions Chronology for restructuring phases.

**Ticket Types**

- **One-Way Tickets**

One-way tickets are valid for one trip only, defined as continuous travel from the origin station to the destination station specified on the ticket. One-way trips must be completed within three hours after purchase of ticket on the day of purchase - the expiration time and date is displayed on the ticket. Types of one way tickets sold: adult, senior/disabled/medicare, student, military and youth.

Future dated one-way tickets do not need to be completed within three hours after purchase and are valid on the date that is printed on the front of the ticket. Future dated tickets may be purchased one year in advance.
- **Round-Trip Tickets**

Round-trip tickets are valid for two trips only, from and to the origin station and the destination station marked on the ticket. The first leg of a round-trip ticket is valid for three hours from purchase. The return ticket is valid for travel anytime on the same day as the first leg of the trip or until 3:00 a.m. the following day. Types of round-trip tickets sold: adult, senior/disabled/medicare, student, military and youth round trip. Tickets are priced to equal two one-way tickets.

Future dated round-trip tickets do not need to be completed within three hours after purchase and are valid on the two dates printed on the ticket. Future dated tickets may be purchased one year in advance.

- **7-Day Pass**

The 7-Day Pass is valid for unlimited travel between origin and destination stations for seven consecutive days within the date range printed on the front of the ticket. The 7-Day pass launched on July 1, 2012 and is priced at 3.5 round-trips. Types of 7-Day passes sold: adult, senior/disabled/medicare and student.

- **Weekend DAY Pass**

The Weekend DAY Pass is valid on all operating Metrolink lines on EITHER Saturday or Sunday, for the weekend date printed on the front of the ticket. There are no additional discounts that apply to this ticket type.

- **Monthly Pass**

Monthly passes are valid for unlimited travel between the origin station and destination station printed on the pass during the calendar month. A Monthly Pass allows for unlimited systemwide weekend travel starting at 7:00pm on Friday through 11:59pm on Sunday. Types of monthly passes: adult, senior/disabled/medicare, and student.

- **Group Tickets and Vouchers**

Group tickets are sold through Metrolink administrative offices on a reservation basis for non-rush hour and weekend trains. Metrolink distributes tickets or vouchers to the group traveling. Tickets/vouchers are valid for travel on the day printed on the ticket/voucher only, between the specified origin and destination stations. The criteria for group sales include:

  - 15 or more persons, with a maximum of 50
  - $12.00 per person round trip (same day travel)
• Group ticket is valid for transfer to connecting transit
• Group vouchers are not valid for transfer to connecting transit
• Reservations are required 21 days prior to travel; advance notice must be received 14 days prior to travel
• Three children age 5 and under may travel free with an adult using a valid ticket
• Group ticket is valid for travel only on non-rush hour or on weekend trains
• Group sales tickets are nonrefundable and nontransferable
• A $2.50 handling fee is charged per group order in addition to the $12 per-person price. The price of the group ticket is indexed to the future systemwide fare increase and will be implemented each time the cumulative systemwide increase would result in a $1 increase in the group ticket.

### School Group Tickets

School group tickets are available by reservation through the Metrolink administrative office. The tickets are provided to the school group in voucher form, indicating the boarding and alighting stations, the date, time and specific trains for the school group. Additional policies include:

- Per person cost is $1.50 one-way and $3.00 round trip
- Minimum group size is 15, maximum is 130 (limited by train capacity, exceptions are granted at the discretion of the CAO)
- Transfers to connecting transit are not included
- Minimum chaperon-to-student ratio of 1:5 is required
- Chaperons must agree to and sign Metrolink Safety Guidelines
- Reservations must be received four weeks prior to travel; advance payment must be received three weeks prior to travel
- Travel limited to off-peak trains

### Student Fares

Student fares are available to individuals who have valid student identification. These tickets can be purchased through Ticket Vending Machines. Student one-way, round-trip, 7-day and monthly passes are discounted 15% from the adult fare. A valid student identification card must be presented to the fare inspector upon request.

### Military Fares

Military Discount: one-way and round-trip tickets are discounted 10% for active military who have a valid Common Access Card (CAC).
**Youth Fares (Weekend Only)**

For passengers ages 6 to 18, the youth fare is only available during the weekends. The fare is 25% off the adult weekday fare on one-way and round-trip tickets. There is no weekday youth fare. Youth fare discounts are not available on 7-Day passes and monthly passes.

**Fares for Children**

Three children ages 5 years and under may ride free of charge with each adult parent or guardian using a valid ticket. Each additional child is charged the youth fare for weekend travel or the adult fare for travel during weekdays.

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For passengers 65 and older, the fare is 25% off the adult fare for 7-Day pass and monthly passes. One-way and round-trip tickets are 50% off the adult fare.

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Customers purchasing a reduced senior citizen fare for Metrolink services shall carry proper photo identification cards indicating their age as 65 or older. ID cards must be shown to the fare inspector upon request.

**Fares for Persons with Disabilities**

For passengers with a disability, the fare is 25% off the adult fare for 7-Day and monthly passes. One-way and round-trip tickets are 50% off the adult fare. One personal care attendant for a person with a disability may ride for free until the new Metrolink Personal Care Attendant Identification Card is implemented. A person with a disability that is eligible to have a personal care attendant, must obtain an identification card for each PCA that accompanies them. The first PCA ID card is priced at $25 and every subsequent PCA ID card is priced at $15 for applications that are submitted together.

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Passengers using a reduced fare ticket for people with disabilities shall carry proof of eligibility. One of the following eligibility cards must be shown to the fare inspector upon request:

- Los Angeles County Transit Operators Association Card (LACTOA)
- Medicare ID card, which is red, white and blue.
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• DMV placard identification card.

• Access Services Inc. clients may ride Metrolink with valid photo Access Services identification in lieu of Metrolink fare media.

**Law Enforcement Officers**

Metrolink allows uniformed law enforcement officers to ride free of charge if the officer meets all of the following criteria:

• Has peace officer status under California Penal Code 832
• Presents their valid photo ID card issued by their law enforcement agency during regular fare inspections or at the request of any Metrolink fare verifier.
• Wears a Class A agency-authorized uniform that includes an agency ID card, metal badge, baton and holder, metal name plate, rank insignia on uniform shirt, service weapon, gun belt and holster.

This fare-exempt policy is restricted to law enforcement officers wearing a Class A uniform only. Class B uniforms are not acceptable which include, but are not limited to:

• Raid jackets
• Flight suits or jump suits
• Polo or golf shirts
• Washable cotton/polyester blend uniforms similar in appearance to a Class A uniform.

In addition, Metrolink requires law enforcement officers who are riding free under this policy to:

• Take appropriate law enforcement action when they observe criminal activity or when asked by a citizen or Metrolink employee
• Respond accordingly in the event of a rail-related incident or accident
• Relinquish their seat to a paying customer on crowded trains

**Transfers to Other Transit Services**

The Metrolink fare structure includes a transfer to participating connecting transit operator services, thus allowing for a seamless transfer from Metrolink to other transit services. Metrolink has entered into transfer agreements with area transit
operators to make it easy for customers to use bus and other rail services by simply presenting their Metrolink ticket to the driver of the connecting transit.

Transfers to most connecting transit at Metrolink stations, including most bus routes, and all stations on the Red Line, Blue Line, Green Line, Purple Line, Expo Line, Orange Line and Gold Line, are free for Metrolink customers with a valid Metrolink ticket. Metrolink riders who transfer to Metro Rail in LA County must tap a turnstile or validator at the Metro Rail stations. Taping an expired Metrolink ticket is a violation of this policy and could result in a citation. Valid fare media include monthly passes for the current month; 7-day pass, weekend day pass, one-way and round-trip tickets for same day travel only – the day printed on the ticket, and validated 4-trip/2-trip tickets for the same date only that is printed on the ticket.

4-trip/2-trip tickets must be validated for that day of travel; 4-trip/2-trip ticket holders boarding other transit service prior to validating their Metrolink ticket are required to pay the fare of the connecting transit.

Some additional restrictions and transfer charges may apply to specific connecting transit operators in accordance with the individual transfer agreements.

**Ticket Sales Locations**

All Metrolink stations have Ticket Vending Machines (TVMs) that sell all ticket types except 4-trip/2-trip tickets, and group travel tickets/vouchers. Other ticket sales locations include:

- Union Station ticket sales offices
- Pass-By-Mail available through the Metrolink administrative office
- Corporate partners business locations
- Retail sales outlets such as transit stores, selected city halls, malls, and building-based sites

**Corporate Partner Program**

Monthly passes, 7-Day, RT tickets for employees of participating corporations are sold on consignment and through the Corporate Quick Card. Tickets are sold to participating companies through the Metrolink administrative office. Metrolink is reimbursed the full cost of the tickets that the corporation distributes. The participating corporate partner is responsible for distribution of the tickets/passes or Corporate Quick Card to their employees and for receipt of any co-payments by the employee.
Special Fare Regulations

Multi-Line tickets and reciprocal stations: 1) Tickets for either the San Bernardino Line or Riverside Line are valid for travel between stations of equal or lesser distance on either line. 2) Tickets on the Riverside Line, the 91 Line, or the IEOC Line are valid for travel between stations of equal or lesser distance on any of these routes if the origin or destination station is in Riverside County or San Bernardino County.

Connecting Stations: Connections between Metrolink trains can be made at Los Angeles Union Station, downtown Burbank, Fullerton, Glendale, Orange, Riverside, San Bernardino, San Juan Capistrano, Santa Ana and Tustin.

See diagram to the right.

Service Animals

Service animals traveling with passengers with disabilities shall be transported without additional charge.

Service animals in training are permitted on trains. Trainers of service animals are fare exempt when engaged in training activities.

Other Animals

A passenger may carry a small dog or other pet enclosed in a suitable animal carrier or crate that fits on the passenger’s lap or under the seat.
Special Promotional Tickets and Discounts

Metrolink may establish unique promotional fares and tickets for special trains, charter trains, promotions and discounts to encourage ridership. Special promotional tickets may be sold at special events or stations for unique promotions. Special promotional fares include, but are not limited to: discount coupons, two-for-one specials, four friends ride free, promotional seven day passes, 4-trip tickets, round-trip special ticket, and other discounts. The Board of Directors has delegated the authority for approval of new promotional ticket and discount programs to the chief executive officer.

Complimentary/ Trial Ride Tickets

This section establishes the procedures and requirements governing the distribution of complimentary/ trial ride tickets. SCRRA distributes a limited number of complimentary/ trial ride tickets each year. SCRRA uses complimentary/ trial ride tickets for two principal purposes. First, to improve or enhance customer service as measured by our Quality Service Pledge, and second, as a marketing tool to increase ridership and/or promote services. As noted below, SCRRA employees are strictly prohibited from receiving complimentary/ trial ride tickets for personal use or personal distribution.

Ticket Distribution to the Public

Complimentary/ trial ride tickets are provided to authorized SCRRA employees who obtain approval from their direct supervisor for distribution to passengers. Such employees must submit a completed complimentary/ trial ride Fare Media Request Form to obtain tickets. This form requires, among other things, a description of the event or purpose to justify the distribution, as well as the employee’s supervisor or manager’s authorization.

Employees who receive the proper authorization may distribute complimentary/ trial ride tickets for the following purposes:

1. **Improve customer satisfaction.** In the event that a Metrolink customer has an experience that falls below the specifications of the Quality Service Pledge, an authorized staff member may offer a complimentary/ trial ride ticket to redress any legitimate customer dissatisfaction.

2. **Promote SCRRA’s services.** In order to promote SCRRA services, Staff may distribute complimentary/ trial ride tickets to individuals targeted through a specific marketing promotion or campaign by, for example, providing an introductory experience to potential new customers or educating customers as to SCRRA’s services.
SCRRA Employees who receive complimentary/ trial ride tickets are responsible to distribute those tickets in accordance with this policy. Under no circumstances may employees receive complimentary/ trial ride tickets for personal use or personal distribution. Misuse or unauthorized distribution of these tickets is subject to disciplinary action including, but not limited to, employment termination.

Ticket Distribution to Board Members

At the beginning of his/her year term on the Board, each Board member and alternate receives one SCRRA identification card. The Board member and alternate may use their identification card to travel on SCRRA’s trains. This identification card is issued to cover public transit costs incurred as part of their official duties in SCRRA’s service area. Board members and alternates are encouraged to use Metrolink service to attend board/committee meetings and in the process, test the efficacy of SCRRA’s service. This identification card is non-transferable and SCRRA will collect this identification card when each Board member and alternate ceases service on the Board.

Individual Board members and alternates may not receive complimentary/ trial ride tickets for personal distribution for any reason, nor may Board members and alternates receive complimentary/ trial ride tickets (including any media sometimes identified as a “lifetime ticket”) at any time after conclusion of their service on the Board except in accordance with this policy.

Ticket Distribution to Member Agencies

Member Agencies may request complimentary/ trial ride tickets to promote SCRRA services consistent with this policy. The Member Agency must obtain approval from SCRRA’s Manager, Marketing and Sales by submitting the Member Agency Fare Media Request Form. Qualified Member Agency staff may distribute complimentary/ trial ride tickets to individuals targeted through a specific marketing promotion or campaign as per this policy. Member Agencies are required to track the distribution of complimentary/ trial ride tickets.

Ticket Inventory Control

The Fare Collection Department manages the inventory of complimentary/ trial ride tickets. Ticket management includes ordering and tracking the tickets in numerical sequence in a control log.

Quality Service Pledge (QSP)

When average on-time performance of a line falls below 80% for a calendar month, SCRRA will sell a line-restricted (no reciprocity rights) monthly pass at a
discount of 25% valid in a subsequent month after the average monthly on-time performance on the line was below 80%. (Where reciprocity/multi-line ticket rights are available, a full price monthly pass will also be available for purchase). A train is defined as “on time” when it arrives at its end point five minutes or less than the scheduled arrival time.

The monthly on-time performance of a line is calculated within three working days of the end of the month. Discount sales begin on the 15th of the month and continue through the 14th of the following month when the offer would expire. For example, poor on-time performance in March would trigger sale of a discount May monthly pass during the sales period in April. Discount passes are sold through the Pass-by-Mail and CPP programs, from ticket windows at Union Station and in the TVMs as a special ticket. Ticket sales through the TVM require a 60 day programming period.

- Extensive Delay: One-Time Incident

An extensive delay is a delay to riders exceeding one hour from the published train schedule. Upon request, with proof of pass ownership, a monthly pass holder is eligible to receive a universal 4-trip ticket with a one-year expiration from the date of the incident. One-way, round-trip or 7-Day ticket holders receive a replacement ticket no less than the value of the trip that was extensively delayed. The ticket holder must submit the original ticket(s) to be eligible for replacement ticket.

- Exclusions:
  
  Train delays caused by:
  Acts of God and nature
  Third-party activity such as police and fire authorities or government agencies
  Alternative transportation providers
  Temporary operating schedules

- Sole Authority

Metrolink has sole authority to grant exceptions to the compensation policy and reserves the right to deny a claim for compensation that does not meet the criteria herein.

**Ride Promise**

If a passenger misses the scheduled connecting Metrolink train due to Metrolink’s fault, Metrolink will make every attempt to secure alternative transportation for the rider to his/her destination station. If Metrolink cannot secure alternative
transportation within sixty (60) minutes of the missed Metrolink train's scheduled departure time, passengers can be reimbursed for their costs for a rental vehicle or taxi, not to exceed $50.00 per passenger. Reimbursement is based on the passengers’ submission of their original dated receipt from the transit provider (taxi driver, car rental company, etc.).

**Definitions**

**Scheduled Connection:** Ten minutes between a Metrolink train's published arrival time and the connecting Metrolink train's published departure time at the same station.

**Alternative Transportation:** Transportation that replaces regular Metrolink train service. This may include, but it is not limited to another Metrolink train, an Amtrak train, bus, van, taxi or other charter operator, and is at Metrolink's discretion.

**Temporary Operating Schedules:** When Metrolink's published train schedule is modified to allow planned construction work or special event train service.

**Extensive Delay:** Delay to riders exceeding one hour from the published train schedule.

**Ticket Refunds**

Metrolink tickets are nonrefundable and nonreplaceable except in extraordinary circumstances. In certain circumstances, Metrolink will provide a refund for customer’s tickets. Refund requests may be submitted by mail to Metrolink's administrative offices.

**Special Trains**

Metrolink from time to time operates special trains beyond the standard operating schedule. Unique fares may be established for special trains. These unique fares and tickets may be sold either through the Ticket Vending Machines, by mail or another form. In some instances, such as charter trains, all fares must be prepaid and passengers may not be required to have tickets.

**Amtrak Tickets – Rail 2 Rail Program**

Amtrak Pacific Surfliner, monthly passes are valid on any Metrolink train, within the origin and destination station limits on their Amtrak ticket as part of the Rail 2 Rail program (some blackout dates apply).
Metrolink monthly pass holders may ride any Amtrak Pacific Surfliner train within the origin station and destination station of their pass.

Any Metrolink fare media valid for travel between Los Angeles Union Station and the Burbank Airport Station is accepted on Amtrak Pacific Surfliner trains in this segment.

Any Amtrak fare media valid for travel between Los Angeles Union Station and Bob Hope Burbank Airport is accepted on Metrolink trains in this segment.

Amtrak Shared Service trains as part of the Rail 2 Rail program will accept all Metrolink ticket types.

**Measures and Public Hearing Procedures for Fare Changes**

The Federal Transit Administration requires that transit agencies have policies that provide the public an opportunity to comment on proposed changes in fares. The SCRRRA Board has adopted the procedures that provide for a public hearing in the event of proposed changes in Metrolink fares. These procedures for public review include:

- A public hearing
- Public workshops prior to the public hearing
- Publication of a notice describing proposed change in fares in an appropriate newspaper(s) of general circulation
- Placement of public notice brochures onboard trains, and at Customer Service Centers.
- Posting of a public notice on the agency website
- Establishment of avenues to provide comments on proposed changes in fares or service in writing using electronic or more traditional methods such as by mail or fax.
- Consideration must be given to views and comments expressed by the public at such hearings.

**Metrolink Supplemental Instructions**

Additional operational procedures governing fare policy implementation and enforcement are described in the Metrolink Supplemental Instructions published by the Operations Department for train operating crews. The Supplemental Instructions are incorporated by reference into this schedule of fare policies and procedures. The policies enumerated in this Fare Policies and Procedures document take precedence over directives and guidance in the Metrolink Supplemental Instructions publication.
## COMPLIMENTARY FARE MEDIA REQUEST FORM

### Request Info

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**Shipping Options**

- Return to Requestor

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^ Please allow sufficient time to assemble New Rider Kits

* Requests for quantities of 100 or more must be approved by Department Director

** All packages are shipped via FedEx Ground. Please complete OTHER, and specify desired method of shipment if applicable.
MEMBER AGENCY FARE MEDIA REQUEST FORM

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* All packages are shipped via FedEx Ground.
SB 953 (Roth) Vehicle Parking on Public Grounds

Issue

Senate Bill 953 introduced by Senator Richard Roth (D-Riverside) expands the definition of public transportation agency to include Riverside County Transportation Commission and authorizes transportation agencies to enforce parking restrictions.

Recommendation

Staff recommends that the Legislative and Communications Committee approve and recommend the Board adopt a “Support” position on SB 953.

Alternative

The Committee may choose to adopt an alternative position on SB 953.

Background

This bill was introduced by Senator Richard Roth (D-Riverside) on behalf of the Riverside County Transportation Commission (RCTC). The California State Vehicle Code provides explicit direction on public grounds and locations subject to parking prohibitions, as well as which entities can enforce those prohibitions. Currently, the state code does not include public transportation agencies as either a public ground or an enforcing entity. As a result, RCTC is unable to enforce parking restrictions at the Metrolink stations they own and operate. This bill seeks to amend section 21113 of the Vehicle Code to include the property of a public transportation agency as subject to regulation and grants the authority to enforce regulations to a public transportation agency.

Access to reliable parking is essential for Metrolink passengers to access our services. Maintaining a safe and orderly parking lot is also needed for attracting and retaining of customers, therefore enabling RCTC to enforce parking restrictions at their facilities is needed to best serve current and potential Metrolink riders.
Staff recommends that the Legislative and Communications Committee approve and recommend the Board adopt a Support position on SB 953. Staff will coordinate lobbying efforts with RCTC staff to ensure passage of this legislation.

**Budget Impact**

This bill does not have a direct budgetary impact on the Authority.

Prepared by: Patricia Torres Bruno, Government & Regulatory Manager
Jennifer Cohen, Government Affairs Administrator

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One Gateway Plaza, 12th Floor, Los Angeles, CA 90012

SOUTHERN CALIFORNIA REGIONAL RAIL AUTHORITY

TRANSMITTAL DATE: March 7, 2014
MEETING DATE: March 14, 2014

TO: Legislative and Communications Committee
FROM: Patricia Torres Bruno, Government and Regulatory Affairs Manager

SUBJECT: State and Federal Legislative Update

Issue
Staff will provide an update on current legislative issues in State and Federal Government Affairs.

Recommendation
The Committee may receive and file this informational item.

Alternative
The Committee may choose to act upon the information provided.

Background
Each month staff provides the Committee with a summary of recent developments emerging from the State Legislature and Congress that are of interest to the agency.

Federal
The House Transportation & Infrastructure Committee has been busy holding several hearings of interest to Metrolink:

*House Transportation & Infrastructure Rail Subcommittee – Oversight of Passenger and Freight Rail Safety*

The House Transportation & Infrastructure (T&I) Subcommittee Chairman Jeff Denham (R-Modesto) held a hearing on rail safety where positive train control implementation was discussed. The focus of the hearing was to discuss how the federal agencies and freight and rail industry are enhancing rail safety particularly after some recent tragic incidents. The Members of the Subcommittee on Rail heard testimony from Federal Railroad Administrator (FRA) Joseph Szabo, National Safety Transportation Board Member Robert Sumwalt, Vice President & National Legislative Representative of the Brotherhood of
Locomotives Engineers and Trainmen John Tolman, American Association of Railroads President Edward Hamberger and American Public Transportation Association President Michael Melaniphy.

Specific witness comments on Positive Train Control (PTC) during the hearing included:

The Honorable Joseph Szabo, Administrator outlined the pillars of the FRA’s safety vision which include:

- Continuing strong oversight and enforcement that is data driven
- Proactive safety based programs that identify and eliminate risk well in advance
- Ensuring predictable and reliable funding for rail including capital investments in new safety technologies.

Administrator Szabo also said the FRA continues to work with the industry to implement PTC, and make strides to address human factors by taking steps to ensure the competency of system engineers. He also said Congress needs to put rail funding on par with funding for other modes of transportation to ensure safety.

The Honorable Robert L. Sumwalt said PTC is an important component in improving passenger rail and freight rail safety. He said many cannot meet the December 2015 deadline and explained that NTSB should have a transparent accounting of progress made and not made so that NTSB and regulators can make informed decisions on PTC. He continued that NTSB’s files are full of accidents that could have been prevented by PTC, and said that every day PTC is delayed, the risk for an accident remains. For PTC to accomplish the intended benefits, it must be implemented by the standards set in the Rail Safety Improvement Act (RSIA).

Mr. Michael Melaniphy stated that APTA’s commuter railroads face big challenges on PTC. He also emphasized that APTA’s commuter railroads support and are fully committed to implementing PTC on all of their railroads. However he does not think they can implement PTC on the entire commuter rail system by the 2015 deadline. He said APTA addressed this issue with Congress in 2010, including the $3B in implementation costs that are needed.

Mr. Edward R. Hamberger said implementation of PTC needs to be a transparent process. He also discussed an issue with the Federal Communications Commission (FCC). The FCC has told AAR to stop installing communications poles, and asked them to prove there are no cultural or historical impacts of these poles. 22,000 need to be installed on rights-of-way that the railroads own. He said there should be an exemption to allow for these poles.

Mr. John Tolman, said it is apparent that even after numerous PTC preventable accidents and an act of Congress, railroads cannot be persuaded to install PTC. He asked Congress to consider how many lives could have been saved and noted that carriers have had
adequate time to prepare for implementation. He added that there should be no blanket delay.

**The House Transportation & Infrastructure Highways & Transit Subcommittee Roundtable – Surface Transportation Reauthorization**

The House Transportation & Infrastructure Highways & Transit Subcommittee Chairman Tom Petri (R-WI) held a roundtable discussion with representatives of the transportation industry on policy issues related to the development of the surface transportation reauthorization legislation. Members of the Subcommittee heard testimony from the President of the American Trucking Association Bill Graves, President of the American Highway User Alliance Greg Cohen, Campaign Director for Transportation America James Corless, Director of Transportation with the US Chamber of Commerce, and President of the Transportation Trades Department AFL-CIO Edward Wytkind.

As you may recall, Moving Ahead for Progress in the 21st Century Act (MAP-21) authorized transportation programs in 2012 and is set to expire in September 2014. The Senate and House leadership have expressed interest in trying to adopt a surface transportation bill. Specifically, Senate Environment & Public Works Committee Chairwoman Barbara Boxer (D-CA) has expressed her intentions to have a bill approved by her Committee by April to allow the Finance Committee to address funding mechanism for the bill. House T&I Chairman Bill Shuster (R-PA) has expressed his intentions to have a transportation bill adopted by August recess.

**House Transportation & Infrastructure Committee Hearing – Improving the Nation’s Highway Freight Network**

The House Transportation & Infrastructure Highways and Transit Subcommittee Chairman Tom Petri (R-WI) held a hearing on improving the nation’s highways and freight network. The Subcommittee focused on extensive infrastructure needs of the freight industry and the key role that the highways infrastructure plays in delivering goods. Many of these policy issues will have to be addressed in the surface transportation reauthorization legislation. Subcommittee Members received testimony from Wisconsin DOT Secretary Mark Gottlieb, FedEx Ground President and CEO Henry Majer, Senior Vice President of Public Affairs at Volvo Group North America Susan Alt and Mayor Gerald Bennett from Palos Hills, Illinois on behalf of the Chicago Metropolitan Agency for Planning.

**Tax Reform & Commuter Tax Benefit Update**

The House Ways and Means Committee Chairman Dave Camp (R-MI) released a tax reform discussion draft on February 26. According to Chairman Camp, the proposal will not be considered in the Committee until after the November mid-term elections. However, this bill is a starting point for future tax reform negotiations in Congress. Key highlights of the bill include:
• Allows employers to provide $130 in monthly transit benefits and $250 in monthly parking benefits
• Dedicates $126.5B to the Highway Trust Fund (HTF) to fully fund highway and infrastructure investment through the HTF for eight years
• Maintains exemptions for municipal bonds

President’s Surface Transportation Reauthorization Proposal

On February 26, President Obama outlined a proposal for a four-year, $302B surface transportation reauthorization bill. The proposal, which will be released in detail within the President’s FY15 budget, is similar to his previous “fix it first” proposal in the FY14 budget. Of interest to Metrolink, is the proposed increased funding for high speed and intercity passenger rail. The proposal would triple funding for the FRA from $1.6B in FY 2014 enacted levels to $4.8B in the President’s proposal. In addition to $302B for existing surface transportation programs, the President proposes $4B for incentive grants to states that adopt policies favored by the Administration. The President reiterated his State of the Union proposal that additional funding for transportation programs come from comprehensive tax reform. More details will be released when the President releases his FY 2015 budget.

State

The 2014 Legislative Session is progressing with nearly 2,000 bills having been introduced in advance of the February 21st deadline. Specifically of interest to the Authority, the legislature has released several bills on carbon tax, railroad quiet zones and budget trailer bills relating to transportation. Staff is currently reviewing these key legislative proposals as well as the Legislative Analyst’s review of the 2014-15 budget proposals, and will present an oral summary of these legislative issues to the Committee.

Budget Impact

There is no immediate budget impact as a result of this update.

Prepared by: Patricia Torres Bruno, Government & Regulatory Manager
Jennifer Cohen, Government Affairs Administrator

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