



Joint Meeting of the WRCOG Executive Committee and Supporting Foundation

REVISED AGENDA

**Monday, May 6, 2024
2:00 PM**

**County of Riverside Administrative Center
4080 Lemon Street, 1st Floor, Board Chambers
Riverside, CA 92501**

Committee members are asked to attend this meeting in person unless remote accommodations have previously been requested and noted on the agenda. The below Zoom link is provided for the convenience of members of the public, presenters, and support staff.

[Public Zoom Link](#)

**Meeting ID: 893 7088 6219
Passcode: 20242024
Dial in: 669 444 9171 U.S.**

In compliance with the Americans with Disabilities Act and Government Code Section 54954.2, if special assistance is needed to participate in the Executive Committee meeting, please contact WRCOG at (951) 405-6706. Notification of at least 48 hours prior to meeting time will assist staff in assuring that reasonable arrangements can be made to provide accessibility at the meeting. In compliance with Government Code Section 54957.5, agenda materials distributed within 72 hours prior to the meeting which are public records relating to an open session agenda item will be available for inspection by members of the public prior to the meeting at 3390 University Avenue, Suite 200, Riverside, CA, 92501.

In addition to commenting at the Committee meeting, members of the public may also submit written comments before or during the meeting, prior to the close of public comment to lfelix@wrcog.us.

Any member of the public requiring a reasonable accommodation to participate in this meeting in light of this announcement shall contact Lucy Felix 72 hours prior to the meeting at (951) 405-6706 or lfelix@wrcog.us. Later requests will be accommodated to the extent feasible.

1. CALL TO ORDER (Crystal Ruiz, Chair)

2. PLEDGE OF ALLEGIANCE

3. ROLL CALL

4. PUBLIC COMMENTS

At this time members of the public can address the Committee regarding any items within the subject matter jurisdiction of the Committee that are not separately listed on this agenda. Members of the public will have an opportunity to speak on agenda items at the time the item is called for discussion. No action may be taken on items not listed on the agenda unless authorized by law. Whenever possible, lengthy testimony should be presented to the Committee in writing and only pertinent points presented orally.

5. CONSENT CALENDAR

All items listed under the Consent Calendar are considered to be routine and may be enacted by one motion. Prior to the motion to consider any action by the Committee, any public comments on any of the Consent Items will be heard. There will be no separate action unless members of the Committee request specific items be removed from the Consent Calendar.

A. Action Minutes from the April 1, 2024, Executive Committee Meeting

Requested Action(s): 1. Approve the Action Minutes from the April 1, 2024, Executive Committee meeting.

B. WRCOG Fiscal Activities Update

Requested Action(s): 1. Receive and file.

C. WRCOG Committees and Agency Activities Update

Requested Action(s): 1. Receive and file.

D. Report out of WRCOG Representatives on Various Committees

Requested Action(s): 1. Receive and file.

E. Professional Services Agreement with PFM Financial Advisors

Requested Action(s): 1. Authorize the Executive Director to enter into a Professional Services Agreement, subject to legal review and approval, with PFM Financial Advisors.

F. First Amendment to Professional Services Agreement with Best Best & Krieger for PACE Administrative and Legal Services

Requested Action(s): 1. Authorize the Executive Director to execute a First Amendment to the Professional Services Agreement with Best Best & Krieger for administrative and legal services for the WRCOG PACE Programs through June 30, 2026.

G. Annual Used Oil Payment Program Authorization - Cycle 15

Requested Action(s):

1. Adopt Resolution Number 05-24; A Resolution of the Executive Committee of the Western Riverside Council of Governments to support Regional Application – Used Oil Payment Program – 15.

H. I-REN Monthly Activities Update

Requested Action(s):

1. Receive and file.

I. Single Signature Authority Report

Requested Action(s):

1. Receive and file.

J. Approval of Fiscal Year 2023/2024 Supporting Foundation Budget Amendment and Adoption of Fiscal Year 2024/2025 Supporting Foundation Budget

Requested Action(s):

1. Approve the Fiscal Year 2023/2024 Supporting Foundation Budget Amendment.
2. Adopt Resolution 01-24; A Resolution of the Board of Directors of the Western Riverside Council of Governments Supporting Foundation adopting the Fiscal Year 2024/2025 Supporting Foundation Budget.

6. REPORTS / DISCUSSION

Members of the public will have an opportunity to speak on agenda items at the time the item is called for discussion.

A. Selection of WRCOG Executive Committee Chair, Vice-Chair, and 2nd Vice-Chair Positions for Fiscal Year 2024/2025

Requested Action(s):

1. Recommend that the General Assembly appoint Rita Rogers, Brenda Dennstedt, and Jacque Casillas to serve as WRCOG Chair, Vice-Chair, 2nd Vice-Chair, respectively, for Fiscal Year 2024/2025.

B. TUMF Nexus Study - Release Draft for Review

Requested Action(s):

1. Direct staff to release the draft TUMF Nexus Study update for a 30-day review / comment period.

7. REPORT FROM THE TECHNICAL ADVISORY COMMITTEE CHAIR

Chris Barajas, City of Jurupa Valley

8. REPORT FROM COMMITTEE REPRESENTATIVES

CALCOG, Brian Tisdale

SANDAG Borders Committee, Crystal Ruiz

SCAG Regional Council and Policy Committee Representatives

WRCOG Advocacy Committee - Access the report [here](#).

9. REPORT FROM THE EXECUTIVE COMMITTEE CHAIR

Crystal Ruiz, City of San Jacinto

10. REPORT FROM THE EXECUTIVE DIRECTOR

Dr. Kurt Wilson

Access the report [here](#).

11. ITEMS FOR FUTURE AGENDAS

Members are invited to suggest additional items to be brought forward for discussion at future Committee meetings.

12. GENERAL ANNOUNCEMENTS

Members are invited to announce items / activities which may be of general interest to the Committee.

13. NEXT MEETING

The next Joint WRCOG Executive Committee and Supporting Foundation meeting has yet to be scheduled.

The next Executive Committee meeting is scheduled for Monday, June 3, 2024, at 2:00 p.m., in the County of Riverside Administrative Center, 4080 Lemon Street, 1st Floor, Board Chambers, Riverside.

14. CLOSED SESSION

CONFERENCE WITH LEGAL COUNSEL - EXISTING LITIGATION PURSUANT TO GOVERNMENT CODE SECTION 54956.9(d)(1):

Antonio Zuniga, et al. v. Western Riverside Council of Governments, et al., Case No. 37- 2021-00007702-CU-MC-NC (San Diego County Superior Court)

15. ADJOURNMENT

Joint Meeting of the WRCOG Executive Committee and Supporting Foundation

Action Minutes

1. CALL TO ORDER

The meeting of the WRCOG Executive Committee was called to order by Chair Chris Barajas at 2:00 p.m. on April 1, 2024, at the Riverside County Administrative Center, 4080 Lemon Street, 1st Floor Board Chambers, Riverside.

2. PLEDGE OF ALLEGIANCE

Committee member Fauzia Rizvi led the Committee members and guests in the Pledge of Allegiance.

3. ROLL CALL

- City of Banning - Sheri Flynn
- City of Beaumont - Mike Lara
- City of Calimesa - Wendy Hewitt
- City of Canyon Lake - Mark Terry
- City of Corona - Tony Daddario
- City of Hemet - Jackie Peterson
- City of Jurupa Valley - Chris Barajas (Chair)
- City of Lake Elsinore - Brian Tisdale
- City of Menifee - Bob Karwin
- City of Moreno Valley - Elena Baca-Santa Cruz
- City of Norco - Kevin Bash
- City of Perris - Rita Rogers
- City of San Jacinto - Crystal Ruiz
- City of Temecula - James Stuart
- City of Wildomar - Joseph Morabito
- County, District 1 - Kevin Jeffries*
- County, District 2 - Karen Spiegel
- County, District 3 - Chuck Washington
- Eastern Municipal Water District (EMWD) - Phil Paule
- Western Water - Fauzia Rizvi

* Arrived after Roll Call

Absent:

- City of Eastvale
- City of Murrieta
- City of Riverside

- County, District 5
- Riverside Co. Superintendent of Schools

4. PUBLIC COMMENTS

There were no public comments.

5. CONSENT CALENDAR

RESULT:	APPROVED AS RECOMMENDED
MOVER:	San Jacinto
SECONDER:	Lake Elsinore
AYES:	Banning, Beaumont, Calimesa, Canyon Lake, Corona, Hemet, Jurupa Valley, Lake Elsinore, Menifee, Moreno Valley, Norco, Perris, San Jacinto, Temecula, Wildomar, District 2, District 3, EMWD, Western Water

A. Action Minutes from the March 4, 2024, WRCOG Executive Committee Meeting

Action:

1. Approved the Action Minutes from the March 4, 2024, WRCOG Executive Committee meeting.

B. Finance Department Activities Update

Action:

1. Received and filed.

C. WRCOG Committees and Agency Activities Update

Action:

1. Received and filed.

D. Report out of WRCOG Representatives on Various Committees

Action:

1. Received and filed.

E. TUMF Program Activities Update: Approval of One TUMF Reimbursement Agreement Amendment

Action:

1. Authorized the Executive Director to execute a TUMF Reimbursement Agreement Amendment No. 1 between WRCOG and the City of Calimesa for all phases of the I-10 / Singleton Road Interchange Project in an amount not to exceed \$5,000,000.

6. REPORTS / DISCUSSION

A. Regional Food Rescue & Technical Assistance Program Activities Update

Action:

1. Received and filed.

B. 2024 General Assembly Community Service Awards

Action:

1. Approved nominations from the Administration & Finance Committee for the 2024 Awards for Outstanding Service to be presented at the General Assembly & Leadership Address:

Individual:

- Dan Gonse - nominated by Council member Joseph Morabito and Mayor Bridget Moore, City of Wildomar
- Noland Turnage - nominated by Council member Rita Rogers, City of Perris
- Tracy Davis - nominated by Supervisor Karen Spiegel, County of Riverside

Group:

- Leaps and Bounds Pediatric Therapy - nominated by Mayor Kevin Bash, City of Norco
- Blue Star Mothers H.O.M.E. - nominated by Supervisor Karen Spiegel, County of Riverside

RESULT:	APPROVED AS RECOMMENDED
MOVER:	District 3
SECONDER:	San Jacinto
AYES:	Banning, Beaumont, Calimesa, Canyon Lake, Corona, Hemet, Jurupa Valley, Lake Elsinore, Menifee, Moreno Valley, Norco, Perris, San Jacinto, Temecula, Wildomar, District 1, District 2, District 3, EMWD, Western Water

C. Fiscal Year 2024/2025 Agency Budget

Action:

1. Recommended that the General Assembly adopt Resolution Number 04-24; A Resolution of the General Assembly of the Western Riverside Council of Governments adopting the Fiscal Year 2024/2025 Agency Budget.

RESULT:	APPROVED AS RECOMMENDED
MOVER:	Perris
SECONDER:	San Jacinto
AYES:	Banning, Beaumont, Calimesa, Canyon Lake, Corona, Hemet, Jurupa Valley, Lake Elsinore, Menifee, Moreno Valley, Norco, Perris, San Jacinto, Temecula, Wildomar, District 1, District 2, District 3, EMWD, Western Water

7. REPORT FROM THE TECHNIAL ADVISORY COMMITTEE CHAIR

Technical Advisory Committee (TAC) Chair Rod Butler was not present to give a report.

8. REPORT FROM COMMITTEE REPRESENTATIVES

Brian Tisdale, CALCOG representative, reported that the REAP Budget letter is still ongoing. He also noted that CALCOG is following AB 2485, which addressing current limitations with the RHNA process

specifically to increase transparency and accountability. This legislation and other bills can be tracked on the CALCOG website.

9. REPORT FROM THE EXECUTIVE COMMITTEE CHAIR

Chair Barajas reported that there is an upcoming event for California Contract Cities in Indian Wells, and encouraged interested members to reach out for more information.

10. REPORT FROM THE EXECUTIVE DIRECTOR

Chris Gray, Deputy Executive Director, reminded the Committee members to submit their Form 700s which are due on April 2, 2024. Any questions pertaining to the Form 700S can be directed to Janis Leonard. Mr. Gray reminded the Committee to read the Executive Director Report attached to the agenda, and to get a General Assembly postcard before leaving.

11. ITEMS FOR FUTURE AGENDAS

There were no items for future agendas.

12. GENERAL ANNOUNCEMENTS

Committee member Kevin Bash invited the Committee to attend events during Horse Week in Norco, April 19 and 20, 2024. Mr. Bash thanked the deputies, firefighters, and animal rescue agents in charge of the horse rescue that took place earlier this month.

13. NEXT MEETING

The next Executive Committee meeting is scheduled for Monday, May 6, 2024, at 2:00 p.m., at the Riverside County Administrative Center, 4080 Lemon Street, Riverside.

14. ADJOURNMENT

The meeting was adjourned at 2:57 p.m. in honor of Brian Nestande.



Western Riverside Council of Governments Joint Meeting of the WRCOG Executive Committee and Supporting Foundation

Staff Report

Subject: WRCOG Fiscal Activities Update
Contact: Andrew Ruiz, Chief Financial Officer, aruiz@wrcog.us, (951) 405-6741
Date: May 6, 2024

Recommended Action(s):

1. Receive and file.
-

Summary:

The Finance Department is nearing the end of the annual audit and preparing for the issuance of its Annual Comprehensive Financial Report. WRCOG has also finalized its Fiscal Year 2024/2025 budget.

Purpose / WRCOG 2022-2027 Strategic Plan Goal:

The purpose of this item is to provide information regarding Finance Department activities. This effort aligns with WRCOG's 2022-2027 Strategic Plan Goal #3 (Ensure fiscal solvency and stability of the Western Riverside Council of Governments).

Discussion:

Background

The Finance Department provides regular updates to WRCOG Committees regarding the financial status of WRCOG and also provides summaries of on-going activities that might be of interest to member agencies. The financial reports document Agency revenues and expenditures through the current fiscal year, as reported by various programs, funds, and other administrative divisions. On-going activities include the preparation of the Agency audit, budget amendments, and preparation of the WRCOG budget for consideration and approval by WRCOG Committees.

Present Situation

Fiscal Year 2024/2025 budget: WRCOG has prepared the Fiscal Year 2024/2025 budget and presented it to its various committees. The budget was recommended to the General Assembly for approval by the Executive Committee on April 1, 2024.

Fiscal Year 2022/2023 Year End and Agency Audit: WRCOG's audit was completed in April 2024 and the auditors are providing an unmodified opinion on the FY 2022/2023 Annual Comprehensive Financial Report (ACFR). An unmodified opinion is the highest form of assurance an auditing firm can provide to its client and means that the audit and associated Agency financials are both in good form and the accounting practices are solid. WRCOG has received the distinguished "Certificate of Achievement for Excellence in Financial Report" from the Government Finance Officers Association for nine consecutive years, most recently the Fiscal Year 2021/2022 Award. The Award recognizes that the Agency is transparent, has provided full disclosure of its financial statements, and that the users of the ACFR have all the information needed to draw a financial conclusion of the Agency. WRCOG will once again apply for the award for Fiscal Year 2022/2023.

Financial Documents

All of WRCOG's most recent financial statements, budget, monthly financials, amendments, etc., are located on the Agency's website [here](#).

Prior Action(s):

None.

Financial Summary:

This item is for informational purposes only; therefore, there is no fiscal impact. Finance Department activities are included in the Agency's adopted Fiscal Year 2023/2024 Budget under the Finance Department under Fund 110.

Attachment(s):

None.



Western Riverside Council of Governments Joint Meeting of the WRCOG Executive Committee and Supporting Foundation

Staff Report

Subject: WRCOG Committees and Agency Activities Update
Contact: Chris Gray, Deputy Executive Director, cgray@wrcog.us, (951) 405-6710
Date: May 6, 2024

Recommended Action(s):

1. Receive and file.

Summary:

Attached are summary recaps of actions and activities from recent WRCOG standing Committee meetings that occurred during the month of April 2024.

Purpose / WRCOG 2022-2027 Strategic Plan Goal:

The purpose of this item is to inform the Committee of actions and activities from WRCOG standing Committee meetings. This item aligns with WRCOG's 2022-2027 Strategic Plan Goal #4 (Communicate proactively about the role and activities of the Council of Governments).

Discussion:

Summaries are provided for the following meetings in April, 2024:

- April 6, 2024 - Executive Committee
- April 10, 2024 - Administration & Finance Committee
- April 11, 2024 - Planning Directors Committee
- April 11, 2024 - Public Works Directors Committee
- April 18, 2024 - Technical Advisory Committee

Prior Action(s):

None.

Financial Summary:

This item is for informational purposes only; therefore, there is no fiscal impact.

Attachment(s):

[Attachment 1 - WRCOG Committees Activities Update April 2024](#)



Western Riverside Council of Governments Executive Committee Meeting Recap

April 1, 2024

Following is a summary of key items discussed at the last Executive Committee meeting.

Agenda Packet: <https://wrcog.us/DocumentCenter/View/10209/EC-0424-AP>

PowerPoint Presentation: <https://wrcog.us/DocumentCenter/View/10212/ec-0424-ppt>

Regional Food Rescue & Technical Assistance Program Activities Update

- SB 1383 mandates rescuing 20% of surplus food by 2025. A contract was awarded to manage regional food rescue efforts, including public outreach, compliance, and education plans.
- The project scope involves creating plans, authorizations, and inspections for Tier I & Tier II Edible Food Generators (EFGs) and Food Rescue Organizations (FROs), as well as deploying the Careit app for food rescue.
- Inspections are conducted to ensure compliance with SB 1383, educate businesses on food rescue efforts, and promote the use of the Careit app, with ongoing tasks including identification of EFGs, marketing, and continued education on food rescue methods.
- Year two of the program includes tasks such as continued identification of EFGs, marketing, education, and scheduling inspections of EFGs & FROs to maintain compliance.
- The amount of food collected between January to March was 6,588 lbs.

2024 General Assembly Community Service Awards

- WRCOG's Community Service Awards highlight community members that have gone above and beyond their respective roles and responsibilities to support western Riverside County.
- The following groups and individuals for this year's awards are:
 - Leaps and Bounds Pediatric Therapy
 - Blue Star Mothers H.O.M.E
 - Dan Gonse
 - Noland Turnage
 - Tracy Davis
- The awardees will be honored at the 33rd annual General Assembly & Leadership Address.

Fiscal Year 2024/2025 Agency Budget

- The draft FY 2024/2025 Agency budget currently has revenues of \$20,449,609 against \$19,815,397 in expenditures.
- Compared to the FY2023/2024 budget, this represents a 2.9% increase in revenues and 7.9% increase in expenditures.
- This is largely attributable to the I-REN budget and the REAP grant funding being withdrawn by the State.

Next Meeting

The next Executive Committee meeting is scheduled for Monday, May 6, 2024, at 2:00 p.m., at the County of Riverside Administrative Center, 4080 Lemon Street, 1st Floor Board Chambers, Riverside.



Western Riverside Council of Governments
Administration & Finance Committee
Meeting Recap
April 10, 2024

Following is a summary of key items discussed at the last Administration & Finance Committee meeting.

Agenda Packet: <https://wrcog.us/DocumentCenter/View/10213/af-0424-ap>

PowerPoint Presentation: <https://wrcog.us/DocumentCenter/View/10221/af-ppt-0424>

Leadership Nominations

- The following persons were nominated for WRCOG leadership positions in Fiscal Year 2024/2025:
 - o Rita Rogers - City of Perris (Chair)
 - o Brenda Dennstedt - Western Water (Vice-Chair)
 - o Jacque Casillas - City of Corona (2nd Vice-Chair)
- These nominations will be forwarded to the Executive Committee for consideration at its May 6, 2024, meeting.

TUMF Nexus Study – Release Draft for Review

- The most recent update has been underway since 2021.
- WRCOG staff and consultants have been working to finalize the Study over the past several months to prepare a draft Study for public release.
- The Administration & Finance Committee recommended that the Executive Committee release the study for a 30-day public comment period.

Request For Proposal – WRCOG General Legal Services

- The item was tabled for further discussion at a subsequent Executive Committee meeting.

Next Meeting

The next Administration & Finance Committee meeting is scheduled for Wednesday, May 8, 2024, at 12:00 p.m., in WRCOG's office at 3390 University Avenue, Suite 200.



Western Riverside Council of Governments Planning Directors Committee Meeting Recap April 11, 2024

Following is a summary of key items discussed at the last Planning Directors Committee meeting.

Agenda Packet: <https://wrcog.us/DocumentCenter/View/10214/pdc-0424-ap>

PowerPoint Presentation: <https://wrcog.us/DocumentCenter/View/10217/pdc-ppt-0424>

Local Permit-Ready Accessory Dwelling Unit Programs

- AB 1332 requires local agencies to develop a program for the pre-approval of accessory dwelling units (ADU) plans. Programs must be in place by January 1, 2025.
- Cheryl Kitzerow reviewed the City of Menifee's Permit Ready ADU Plan including the procurement process, public outreach, timeline, materials, and program success and lessons learned.
- Matt Peters reviewed the City of Temecula's Permit Ready ADU Plan including the number of floor plans, elevations, architectural designs, process, roadblocks, community concerns, and lessons learned.

TUMF Nexus Study – Release Draft for Review

- The most recent TUMF Nexus Study update has been underway since 2021.
- WRCOG staff and consultants have been working to finalize the Study over the past several months to prepare a draft Study for public release.
- The Planning Directors' Committee recommended that the Executive Committee release the study for a 30-day public comment period.

General Announcements

- David Chantarangsu with the City of Murrieta shared that the State rescinded the Town of Portola Valley's Housing Element Certification. Additional information can be found [here](#).

Next Meeting

The next Planning Directors Committee meeting is scheduled for Thursday, June 13, 2024, at 9:30 a.m., in WRCOG's office at 3390 University Avenue, Suite 200, Riverside.



Western Riverside Council of Governments Public Works Committee Meeting Recap April 11, 2024

Following is a summary of key items discussed at the last Public Works Committee meeting.

Agenda Packet: <https://wrcog.us/DocumentCenter/View/10215/PWC-0424-ap>

PowerPoint Presentation: <https://wrcog.us/DocumentCenter/View/10215/PWC-0424-ap>

I-REN Energy Fellowship Update: Member Agency Participation

- Host applications are now open for member agencies to participate in the I-REN Energy Fellowship and to receive a no-cost fellow. [24-25 - CivicSpark Partner Application \(formsite.com\)](#)
- As part of this Fellowship, member agencies will receive a 11-month, near full-time (1700 hour) Fellow to work on your identified energy efficiency projects and initiatives (example projects include but are not limited to: support cities in the prioritization and implementation of energy efficiency projects, development of building inventories, facility audits, building benchmarking, etc.)
- Year 1 Fellowship results include placement of 11 Fellows (five in WRCOG area). Half of the I-REN Fellows are being requested to stay for a second year in the program, by both the fellow and the host agency.
- Contact Tyler Masters, tmasters@wrcog.us or (951) 203-6281 if you have any questions.

Energy Resilience Plan 2.0 Update

- The Energy Resilience Plan (ERP) 2.0 will assist member agencies with increasing the resilience of their facilities, infrastructure, and community against climate hazards and power outages.
- The ERP 2.0 will assist member agencies with identifying and prioritizing facilities and infrastructure, conduct outreach and engagement with member agencies and the community, and prepare feasibility studies to identify potential for implementing microgrids and community resilience centers at agency-owned sites.
- Staff have requested locations and facility data from each member agency for sites that would be good candidates for the microgrid and community resilience center feasibility studies. Staff are setting up meetings with member agency staff to discuss the proposed sites, understand the climate hazards that impact the sites and social vulnerabilities from nearby populations, and critical energy needs and existing power infrastructure for each facility.

Santa Ana Municipal Separate Storm Sewer System Permit Compliance Program Activities Update

- On March 1, 2024, a Tentative Permit was released and on March 15, 2024, a Public Workshop was held by the Regional Board to discuss the draft permit and solicit comments. The Tentative Permit for the Santa Ana River Watershed represents a significant regulatory initiative aimed at improving water quality and managing stormwater discharges in the region. Staff from the Riverside County Flood Control and Water Conservation District provided a comprehensive review and analysis of key aspects of the Tentative Order, along with considerations for responding to the draft document.
- The Riverside County Flood Control and Water Conservation District is designated as the Principal Permittee under the Santa Ana Municipal Separate Storm Sewer System (MS4) Permit and represents the co-permittees to implement area-wide programs required by the MS4 Permit through an Implementation Agreement.

- The presentation provided an overview of the Regional Permit, the Watershed Management Plan requirements, the preliminary costs of compliance and next steps.

TUMF Nexus Study - Release Draft for Review

- The most recent TUMF Nexus Study update has been underway since 2021.
- WRCOG staff and consultants have been working to finalize the study over the past several months to prepare a Draft Study for public release.
- The Public Works Committee recommended that the Executive Committee release the study for a 30-day public comment period.

Next Meeting

The next Public Works Committee meeting is scheduled for Thursday, June 13, 2024, at 2:00 p.m., in WRCOG's office located at 3390 University Avenue, Suite 200, Riverside.



Western Riverside Council of Governments Technical Advisory Committee Meeting Recap April 18, 2024

Following is a summary of key items discussed at the last Technical Advisory Committee meeting.

Agenda Packet: <https://wrcog.us/DocumentCenter/View/10220/tac-0424-ap>

PowerPoint Presentation: <https://wrcog.us/DocumentCenter/View/10229/TAC-0424-ppt>

I-REN Energy Fellowship Update: Member Agency Participation

- Host applications are now open for member agencies to participate in the I-REN Energy Fellowship and to receive a no-cost fellow. [24-25 - CivicSpark Partner Application \(formsite.com\)](#)
- As part of this Fellowship, member agencies will receive a 11-month, near full-time (1700 hour) Fellow to work on your identified energy efficiency projects and initiatives (example projects include but are not limited to: support cities in the prioritization and implementation of energy efficiency projects, development of building inventories, facility audits, building benchmarking, etc.)
- Year 1 Fellowship results include placement of 11 Fellows (five in WRCOG area). Half of the I-REN Fellows are being requested to stay for a second year in the program, by both the fellow and the host agency.
- Contact Tyler Masters, tmasters@wrcog.us or (951) 203-6281 if you have any questions.

TUMF Nexus Study – Release Draft for Review

- The most recent TUMF Nexus Study update has been underway since 2021.
- WRCOG staff and consultants have been working to finalize the Study over the past several months to prepare a draft Study for public release.
- Chris Gray, WRCOG Deputy Executive Director, provided an update on the Study. This update was previously provided to the Administration & Finance Committee, Planning Directors Committee, and the Public Works Committee. Each of these committees recommended that the Executive Committee authorize Staff to release the Draft Study for a 30-day public comment period.
- A public comment letter was provided in advance of the meeting which is provided as an attachment.

Next Meeting

The next Technical Advisory Committee meeting is scheduled for Thursday, May 16, 2024, at 9:30 a.m. in the WRCOG office at 3390 University Avenue, Riverside.

From: Michael McCarthy <MikeM@radicalresearch.llc>

Subject: Public comment - WRCOG TAC meeting agenda item 6.B

Commissioners,

Thank you for the opportunity to comment on the TUMF Nexus Study. TUMF development impact fees are necessary and important to make growth pay its way.

The 'Fair Share' fee is currently inequitable and imbalanced due to incorrect, out-of-date assumptions about industrial development, land-use projections, and residential projections. Many of these can be fixed with updated assumptions in the planning study.

The proposed fee schedule subsidizes industrial development. A fee of \$2.36 per square foot is lower than every other category on a per square foot basis, other than multi-family residential. This is preposterous and an undesirable outcome given that warehouse distribution and fulfillment centers have extremely high trips rates per employee and a disproportionate share of highly damaging truck trips due to the weight of the vehicles.

The industrial category is incorrectly and inaccurately calculated.

- It doesn't weight the relative fraction of the types of industrial development – 90+% of the industrial development in Riverside County is High-Cube warehouses which has the lowest employee density per acre of any industrial type and a higher than average trip rate per employee (see ITE 11th edition fulfillment center trip rates).
- It doesn't scale any of the factors for heavy-duty trucks and their significantly higher damage to transportation infrastructure due to their weight
- The employment conversion factors are from studies that are 20-30 years old – warehouse (and all industrial) job density has declined significantly due to automation in the last two decades.
- There is no mention of automation and autonomous vehicles – driverless trucks and courier vehicles are coming; the City of Riverside just bought autonomous shuttles. TUMF should apply extra fees to no employee vehicles on streets to discourage autonomous vehicle congestion.
- The amount of estimated industrial development in Table 6.2 is 62M SQ FT for 2018-2045 based on SCAG 2020 Connect SoCal estimates. There are currently 120M+ SQ FT of warehouses planned/approved in the WRCOG area in CEQA.
 - o World Logistics Center (40.4M - approved)
 - o Legacy Highlands Phase II (19.8M – NOP)
 - o Stoneridge Commerce Center (9.5M - REIR)
 - o San Jacinto Commerce Center (9M - NOP)
 - o Serrano Specific Plan (6M – county pre-CEQA review)
 - o Sunset Crossroads (5.5M – EIR)
 - o Beaumont Pointe (5.5M - FEIR)
 - o Menifee Valley Specific Plan (5.5M – approved)
 - o West Campus Upper Plateau (4.7M – REIR)
 - o Southern Perris Industrial Project (3M – approved)
 - o Renaissance Ranch (2.4M – EIR)
 - o And ~110 other warehouse projects that are sub 2M SQ FT – see attached figure.

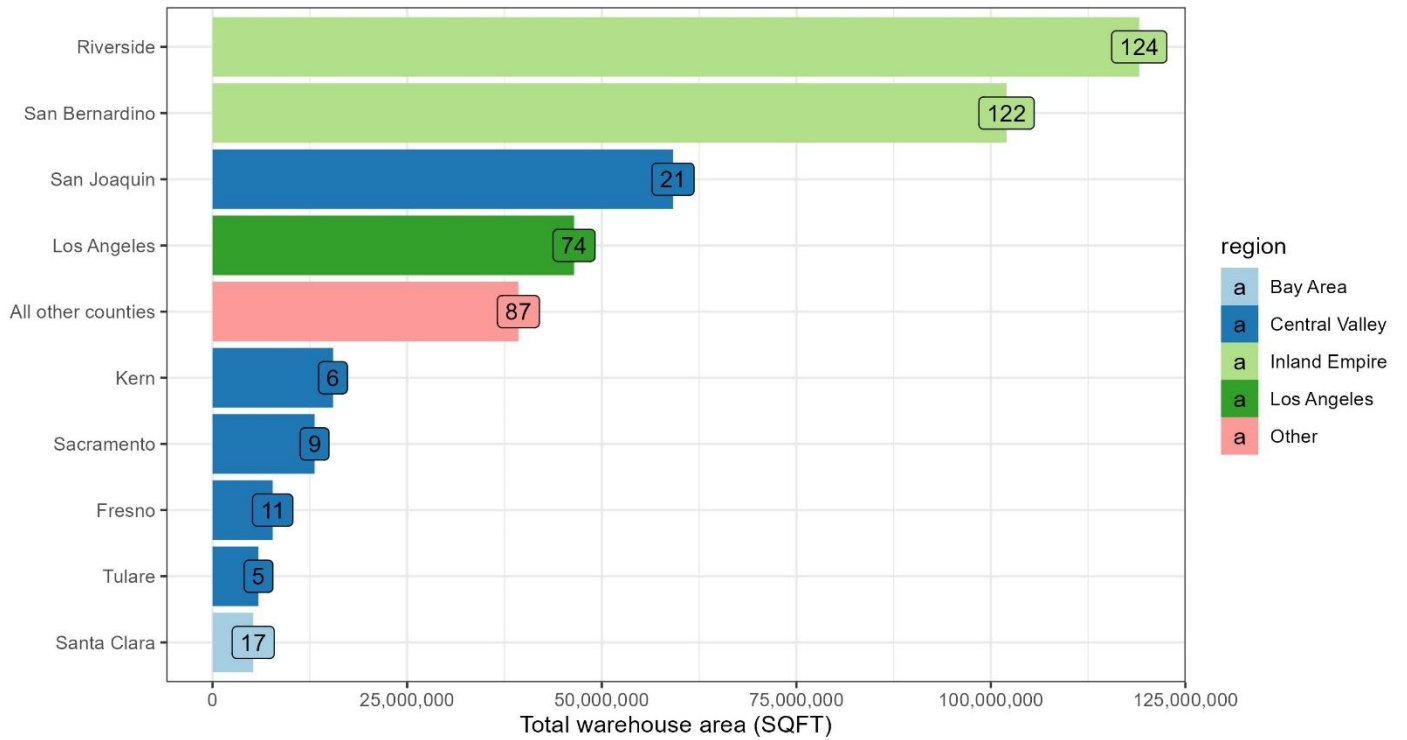
Additionally, all of the categories are based on the now obsolete 2020 Connect SoCal plan – 2024 Connect SoCal was approved and adopted this month. Please use that, as it is less incorrect than the 2020 version for a forward-looking TUMF fee.

Thank you for your attention to this matter. I will provide a detailed critique of the TUMF methodology upon release of the study and Appendix L.

Mike McCarthy

Riverside Neighbors Opposing Warehouses
92508

Planned warehouse projects by county - 2020-2024 with CEQA review





Western Riverside Council of Governments Joint Meeting of the WRCOG Executive Committee and Supporting Foundation

Staff Report

Subject: Report out of WRCOG Representatives on Various Committees
Contact: Chris Gray, Deputy Executive Director, cgray@wrcog.us, (951) 405-6710
Date: May 6, 2024

Recommended Action(s):

1. Receive and file.
-

Summary:

One key function of the Executive Committee is to appoint representatives to various external agencies, groups, and committees on behalf of WRCOG. This Staff Report provides a summary of activities related to appointments for CALCOG, the SANDAG Borders Committee, and the SAWPA OWOW Steering Committee.

Purpose / WRCOG 2022-2027 Strategic Plan Goal:

The purpose of this item to provide information regarding various external agencies, groups, and committees related to WRCOG where WRCOG has appointed one or more representative(s) to serve as its representative. This item supports WRCOG's 2022-2027 Strategic Plan Goal #4 (Communicate proactively about the role and activities of the Council of Governments).

Discussion:

CALCOG Board of Directors (Brian Tisdale)

The CALCOG Board of Directors meeting of April 12, 2024, was cancelled.

The next CALCOG Board of Directors meeting is scheduled for May 22, 2024.

SANDAG Borders Committee (Crystal Ruiz)

The SANDAG Borders Committee met on April 26, 2024. Agenda highlights include:

1. Otay Mesa Land Port of Entry Modernization and Expansion Project.
2. AB 617 International Border Communities – Community Emissions Reduction Plan.

3. Good Neighbor Environmental Board 20th Report: Water and Wastewater in the U.S. - Mexico Border Region.

The next SANDAG Borders Committee meeting is scheduled for May 24, 2024.

SAWPA OWOW Steering Committee (Wes Speake)

The SAWPA OWOW Steering Committee has not met since the last report.

The next SAWPA OWOW Steering Committee meeting is scheduled for May 23, 2024.

Prior Action(s):

None.

Financial Summary:

Appointed Committee members are paid \$150 to attend their respective meetings. WRCOG stipends are included in the Agency's adopted Fiscal Year 2023/2024 Budget under the Administration Department in the General Fund (Fund 110).

Attachment(s):

[Attachment 1 - SANDAG Borders Committee agenda 042624](#)

Attachment

SANDAG Borders Committee
meeting agenda of April 26, 2024



Borders Committee Agenda

**Friday, April 26, 2024
1 p.m.**

Welcome to SANDAG. The Borders Committee meeting scheduled for Friday, April 26, 2024, will be held in person in the SANDAG Board Room. While Borders Committee members will attend in person, members of the public will have the option of participating either in person or virtually.

For public participation via Zoom webinar, click the link to join the meeting: <https://us02web.zoom.us/j/87067008881>

Webinar ID: 870 6700 8881

To participate via phone, dial a number based on your current location in the US:

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Public Comments: Members of the public may speak to the Borders Committee on any item at the time the Borders Committee is considering the item. Public speakers are generally limited to three minutes or less per person.

Persons who wish to address the members on an item to be considered at this meeting, or on non-agendized issues, may email comments to the Clerk at clerkoftheboard@sandag.org (please reference Borders Committee meeting in your subject line and identify the item number(s) to which your comments pertain). Comments received by 4 p.m. the business day before the meeting will be provided to members prior to the meeting. All comments received prior to the close of the meeting will be made part of the meeting record.

If you desire to provide in-person verbal comment during the meeting, please fill out a speaker slip, which can be found in the lobby. If you have joined the Zoom meeting by computer or phone, please use the "Raise Hand" function to request to provide public comment. On a computer, the "Raise Hand" feature is on the Zoom toolbar. By phone, enter *9 to "Raise Hand" and *6 to unmute. Requests to provide live public comment must be made at the beginning of the relevant item, and no later than the end of any staff presentation on the item. The Clerk will call on members of the public who have timely requested to provide comment by name for those in person and joining via a computer, and by the last three digits of the phone number of those joining via telephone. Should you wish to display media in conjunction with your comments, please inform the Clerk when called upon. The Clerk will be prepared to have you promoted to a position where you will be able to share your media yourself during your allotted comment time. In-person media sharing must be conducted by joining the Zoom meeting on the personal device where the content resides. Please note that any available chat feature on the Zoom meeting platform should be used by panelists and attendees solely for procedural or other "housekeeping" matters as comments provided via the chat feature will not be retained as part of the meeting record. All comments to be provided for the record must be made in writing via email or speaker slip, or verbally per the instructions above.

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Vision Statement: *Pursuing a brighter future for all*

Mission Statement: *We are the regional agency that connects people, places, and innovative ideas by implementing solutions with our unique and diverse communities.*

Our Commitment to Equity: *We hold ourselves accountable to the communities we serve. We acknowledge we have much to learn and much to change; and we firmly uphold equity and inclusion for every person in the San Diego region. This includes historically underserved, systemically marginalized groups impacted by actions and inactions at all levels of our government and society.*

We have an obligation to eliminate disparities and ensure that safe, healthy, accessible, and inclusive opportunities are available to everyone. The SANDAG equity action plan will inform how we plan, prioritize, fund, and build projects and programs; frame how we work with our communities; define how we recruit and develop our employees; guide our efforts to conduct unbiased research and interpret data; and set expectations for companies and stakeholders that work with us.

We are committed to creating a San Diego region where every person who visits, works, and lives can thrive.

Borders Committee

Friday, April 26, 2024

Comments and Communications

1. Non-Agenda Public Comments/Member Comments

Members of the public shall have the opportunity to address the Borders Committee on any issue within the jurisdiction of the Borders Committee that is not on this agenda. Public speakers are limited to three minutes or less per person. Public comments under this agenda item will be limited to five public speakers. If the number of public comments under this agenda item exceeds five, additional public comments will be taken at the end of the agenda. Borders Committee members and SANDAG staff also may present brief updates and announcements under this agenda item.

Consent

+2. Approval of Meeting Minutes

Approve

Tessa Lero, Francesca Webb, SANDAG

The Borders Committee is asked to approve the minutes from its March 22, 2024, meeting.

[Meeting Minutes.pdf](#)

Reports

+3. Otay Mesa Land Port of Entry Modernization and Expansion Project

Information

Anthony Kleppe, U.S. General Services Administration

Anthony Kleppe will present an overview of the modernization and expansion project of the existing Otay Mesa Land Port of Entry.

[Otay Mesa Land POE Modernization and Expansion Project.pdf](#)

4. AB 617 International Border Communities – Community Emissions Reduction Plan

Information

Monique Lopez, San Diego Air Pollution Control District

Monique Lopez, San Diego Air Pollution Control District, will present an update on development of a [Community Emissions Reduction Plan \(CERP\)](#) for the region's International Border Communities. The CERP is developed as part of the AB 617 Community Air Protection Program which aims reduce exposure in communities most impacted by air pollution across the state.

5. Good Neighbor Environmental Board 20th Report: Water and Wastewater in the U.S. - Mexico Border Region

Information

Chair Paul Ganster, Good Neighbor Environmental Board - Institute for Regional Studies of the Californias at San Diego State University

Chair Ganster will present an overview of the Good Neighbor Environmental Board 20th Report that addresses unmet drinking water and wastewater needs along the U.S. border with Mexico.

[Water and Wastewater in the U.S.-Mexico Border Region: Twentieth Report of the Good Neighbor Environmental Board to the President and Congress of the United States \(epa.gov\)](#)

6. Adjournment

The next Borders Committee meeting is scheduled for Friday, May 24, 2024,
at 1 p.m.

+ next to an agenda item indicates an attachment

April 26, 2024

March 22, 2024, Meeting Minutes

[View Meeting Video](#)

Chair Jesus Eduardo Escobar (Imperial County) called the Borders Committee meeting to order at 1:08 p.m.

1. Public Comments/Communications/Member Comments

Public Comments: Truth, Blair Beekman, and The Original Dra.

Member Comments: Vice Chair Carolina Chavez (South County).

Consent

2. Approval of Meeting Minutes

The Borders Committee was asked to approve the minutes from its January 26, 2024, meeting.

Public Comments: The Original Dra.

Action: Upon a motion by Vice Chair Chavez, and a second by Councilmember Laura Koval (East County), the Borders Committee voted to approve the Consent Agenda.

The motion passed.

Yes: Chair Escobar, Vice Chair Chavez, Councilmember Koval, and Mayor Dane White (North County Inland).

No: None.

Abstain: None.

Absent: City of San Diego, County of San Diego, and North County Coastal.

Reports

3. Tijuana River Valley U.S. – Mexico Transborder Pollution Environmental Crisis

City of Imperial Beach Mayor Paloma Aguirre presented an overview of the status of the Tijuana River Valley emergency, the comprehensive plan to address the issue, and current implementation challenges.

Public Comments: The Original Dra and Blair Beekman.

Action: Information.

4. Public Health Report on Exposure Risks from Contaminated Water in the Tijuana River Valley

San Diego State University Professor Paula Stigler-Granados discussed how public health impacts may extend far further than beach closures due to sewage and toxic spill on the Tijuana River estuary.

Public Comments: The Original Dra and Blair Beekman.

Action: Discussion.

5. Cross Border Xpress Update

Jorge Goytortua, Cross Border Xpress, presented an overview of Cross Border Xpress operations, crossing volumes, and plans to meet future demand.

Public Comments: The Original Dra and Blair Beekman.

Action: Information.

6. Adjournment

The next Borders Committee meeting is Friday, April 26, 2024, at 1 p.m.

Chair Escobar adjourned the meeting at 2:39 p.m.

DRAFT

Confirmed Attendance at Borders Committee Meeting

Jurisdiction	Name	Member/ Alternate	Attended
South County	Carolina Chavez, Vice Chair	Member	Yes
	Luis Plancarte	Alternate	No
East County	Laura Koval	Member	Yes
	Patricia Dillard	Alternate	No
City of San Diego	Vivian Moreno	Member	No
	Sean Elo-Rivera	Alternate	No
County of San Diego	Joel Anderson	Member	No
	Nora Vargas	Alternate	No
Imperial County	Jesus Eduardo Escobar, Chair	Member	Yes
	Mitch McKay	Alternate	No
North County Coastal	Terry Gaasterland	Member	No
	Ryan Keim	Alternate	No
North County Inland	Dane White	Member	Yes
	Joe Garcia	Alternate	No
Riverside County	Crystal Ruiz	Member	No
	Yxstian Gutierrez	Alternate	No
Republic of Mexico	Alicia Kerber-Palma	Member	No
	Gilberto Luna	Alternate	Yes
Southern California Tribal Chairmen's Association	Raymond Welch	Member	No
	Cody Martinez	Alternate	No
Caltrans	Everett Townsend	Member	No
	Roy Abboud	Alternate	Yes
San Diego County Water Authority	Valentine Macedo, Jr.	Member	No
	Steve Casteneda	Alternate	No
Southern California Association of Governments	Naresh Amatya	Member	No
	David C. Salgado	Alternate	No
Orange County	Vacant	Member	N/A
	Vacant	Alternate	N/A



Press Release

U.S. General Services Administration

For Immediate Release
January 25, 2024

GSA Contact: Mary Simms, 415-971-2827
Email: mary.simms@gsa.gov

General Services Administration completes \$134M Construction Project to Modernize San Diego's Otay Mesa Land Port of Entry at U.S. Mexico Border

SAN DIEGO — The U.S. General Services Administration (GSA) has completed a \$134 million modernization and expansion project at the Otay Mesa Land Port of Entry (LPOE) along the U.S. Mexico border in California.

A vital regional economic engine and travel gateway, the Otay Mesa port processes over \$13.5 billion in exports and \$37.4 billion in imports, nearly 1 million commercial trucks, 2.1 million pedestrians, and 5 million privately owned vehicles annually. Its outdated and undersized 1990s infrastructure struggled to keep pace with surging traffic flows, causing traffic congestion and long wait times and impacting the ability of U.S. Customs and Border Protection (CBP) to conduct its mission.

The Otay Mesa Port of Entry is one of three land ports of entry (LPOE) in the San Diego–Tijuana metropolitan region, in the U.S. state of California, the third-busiest commercial port of entry on the Mexico–United States border.

"We are excited to deliver this modernized facility. In addition to the number of pedestrian inspection booths, the project significantly improves efficiency of inspection areas, processing flows, and the overall travel experience," said **Sukhee Kang, Regional Administrator for GSA's Pacific Rim Region**. "Investing in the infrastructure and modernization of land ports of entry is not just pivotal, but imperative for America's economic growth, national border security, and efficient cross-border transportation."

GSA has modernized and expanded the port to increase commercial vehicle and pedestrian processing capacity to support the tenant agencies' respective missions. The project doubled the number of pedestrian processing facilities to better connect travelers to a nearby transit hub, construction of a new commercial annex building, commercial truck inspection circulation improvements, an increase of commercial inspection booths from nine to 16, and construction of a visitor parking lot and secure employee parking structure. The project provides the port with adequate operational space, reduces traffic congestion, and creates a safer environment for port employees and commercial vehicles.

“CBP’s San Diego Field Office recently collaborated with GSA on the modernization and expansion of our port of entry,” stated **Rosa Hernandez, Otay Mesa Port Director**. “Expanding the footprint in cargo and reconfiguring the pedestrian crossing, will not only aid in safeguarding the homeland but also facilitate expedite processing of lawful trade and travel.”

The project consisted of two phases. Phase 1, completed in Spring 2022, improved commercial truck circulation that hampered traffic moving within the facility and increased the number of commercial inspection booths from nine to 16. GSA also moved the hazmat facility from its legacy location that impacted exports to a new location in the import lot enhancing goods movement. Finally, a binational return to Mexico lane was constructed, allowing trucks denied entry into the U.S. a dedicated lane for return to Mexico, no longer affecting entering traffic. In addition, GSA built a new commercial annex building, a 231 car parking garage providing secure parking for CBP officers and a new U.S. Department of Agriculture Animal and Plant Health Inspection facility were constructed to enhance the nation’s supply chain.

Phase 2 of the project focused on the active pedestrian processing, doubling the number of pedestrian inspection booths from six to 12 and included a pedestrian bridge, which avoided traffic and safely connected pedestrians to the nearby San Diego Metropolitan Transit System hub. Now complete, the project provides the port with adequate operational space, reduces traffic congestion, and creates a safer environment for port employees, pedestrians, and commercial vehicles.

GSA is also working on a \$1.6 million [Bipartisan Infrastructure Law](#) funded project to pave the port’s pre-primary vehicle inspection queuing area with a more sustainable low-embodied carbon (LEC) concrete. In contrast to the existing asphalt, the new LEC concrete boasts a lower carbon footprint, requires less maintenance and is longer lasting - underscoring GSA’s commitment to sustainability. The paving project is anticipated to be completed in Spring 2024.

###

About GSA: GSA provides centralized procurement and shared services for the federal government, managing a nationwide real estate portfolio of nearly 370 million rentable square feet, overseeing **over** \$100 billion in products and services via federal contracts, and delivering technology services that serve millions of people across dozens of federal agencies. GSA’s mission is to deliver the best customer experience and value in real estate, acquisition, and technology services to the government and the American people. For more information, visit [GSA.gov](https://www.gsa.gov) and follow us at [@USGSA](https://twitter.com/USGSA).



Aviso a los Medios

U.S. General Services Administration

Para su publicación inmediata
25 de enero de 2024

Contacto de GSAt: Mary Simms, 415-971-2827
Email: mary.simms@gsa.gov

La Administración de Servicios Generales completa el Proyecto de Construcción de \$134 millones para Modernizar la Garita de Otay Mesa en San Diego en la Frontera entre Estados Unidos y México.

SAN DIEGO — La Administración de Servicios Generales de EE. UU. (GSA por sus siglas en inglés) ha completado un proyecto de modernización y expansión de \$134 millones en la Garita de Otay Mesa a lo largo de la frontera entre Estados Unidos y México en California. Un motor económico regional vital y un portal de viajes, la Garita Otay Mesa procesa más de \$13.5 mil millones en exportaciones y \$37.4 mil millones en importaciones, casi 1 millón de camiones comerciales, 2.1 millones de peatones y 5 millones de vehículos particulares anualmente. Su infraestructura obsoleta y de tamaño insuficiente de la década de 1990 luchaba por mantenerse al día con los crecientes flujos de tráfico, lo que causaba congestión vehicular y largos tiempos de espera, afectando la capacidad de la Aduana y Protección Fronteriza de los Estados Unidos (CBP, por sus siglas en inglés) para llevar a cabo su misión.

La Garita de Otay Mesa es una de las tres garitas en la región metropolitana de San Diego-Tijuana, en el estado de California, siendo la tercera garita comercial más transitada en la frontera entre México y Estados Unidos.

"Estamos emocionados de entregar estas instalaciones modernizadas. Además del número de casetas de inspección peatonal, el proyecto mejora significativamente la eficiencia de las áreas de inspección, los flujos de procesamiento y la experiencia general de viaje", dijo Sukhee Kang, Administrador Regional de la Región del Pacífico de GSA. "Invertir en la infraestructura y modernización de los puertos de entrada terrestres no solo es crucial, sino imperativo para el crecimiento económico de Estados Unidos, la seguridad nacional y el transporte eficiente a través de las fronteras".

GSA ha modernizado y expandido la garita para aumentar la capacidad de procesamiento de vehículos comerciales y peatones para apoyar la capacidad de las agencias arrendatarias con sus misiones. El proyecto duplicó el número de instalaciones de procesamiento peatonal para conectar mejor a los viajeros con una estación de tránsito cercana, la construcción de un nuevo edificio anexo comercial, mejoras en la circulación de inspección de camiones comerciales, un aumento de castas de inspección comercial de nueve a 16 y la construcción de un

estacionamiento para visitantes y una estructura de estacionamiento segura para empleados. El proyecto proporciona a la garita un espacio operativo adecuado, reduce la congestión vehicular y crea un entorno más seguro para los empleados de la garita y los vehículos comerciales.

"La Oficina de Campo de CBP en San Diego colaboró recientemente con GSA en la modernización y expansión de nuestra garita", afirmó Rosa Hernández, Directora de la Garita de Otay Mesa. "La expansión del área de carga y la reconfiguración del cruce peatonal no solo ayudarán a salvaguardar la patria, sino que también facilitarán el procesamiento expedito del comercio y los viajes legales".

El proyecto constó de dos fases. La Fase 1, completada en la primavera de 2022, mejoró la circulación de camiones comerciales que obstaculizaba el tráfico dentro de la instalación e incrementó el número de casetas de inspección comercial de nueve a 16. GSA también trasladó la instalación de materiales peligrosos desde su ubicación heredada que afectaba las exportaciones a una nueva ubicación en el área de importación, mejorando el movimiento de mercancías. Finalmente, se construyó un carril binacional de retorno a México que permite a los camiones denegados la entrada a EE. UU. tener un carril dedicado para regresar a México, sin afectar el tráfico de entrada. Además, GSA construyó un nuevo edificio comercial anexo, un garaje de estacionamiento de 231 automóviles para proporcionar estacionamiento seguro para los oficiales de CBP y una nueva instalación de Inspección de Salud Animal y Vegetal del Departamento de Agricultura de EE. UU. se construyó para mejorar la cadena de suministro nacional.

La Fase 2 del proyecto se centró en el procesamiento activo de peatones, duplicando el número de casetas de inspección peatonal de seis a 12 e incluyó un puente peatonal para evitar el tráfico y conectar de manera segura a los peatones con la estación del Sistema de Tránsito Metropolitano de San Diego. Ahora completado, el proyecto proporciona a la garita un espacio operativo adecuado, reduce la congestión vehicular y crea un entorno más seguro para los empleados de la garita, peatones y vehículos comerciales.

GSA también está trabajando en un proyecto financiado por la [Ley de Infraestructura Bipartidista](#) de \$1.6 millones para pavimentar el área de espera de inspección vehicular pre-primaria de la garita con concreto de bajo contenido de carbono más sostenible. En contraste con el asfalto existente, el nuevo concreto LEC tiene una huella de carbono más baja, requiere menos mantenimiento y tiene una vida útil más larga, subrayando el compromiso de GSA con la sostenibilidad. Se espera que el proyecto de pavimentación se complete en la primavera de 2024.

###

Acerca de GSA: GSA proporciona servicios centralizados de adquisición y servicios compartidos para el gobierno federal, gestionando un portafolio inmobiliario nacional de casi 370 millones de pies cuadrados

arrendables, supervisando más de \$100 mil millones en productos y servicios a través de contratos federales y brindando servicios tecnológicos que sirven a millones de personas en docenas de agencias federales. La misión de GSA es ofrecer la mejor experiencia y valor al cliente en bienes raíces, adquisición y servicios tecnológicos para el gobierno y el pueblo estadounidense. Para obtener más información, visite [GSA.gov](https://www.gsa.gov) y síganos en [@USGSA](https://twitter.com/USGSA).



Western Riverside Council of Governments Joint Meeting of the WRCOG Executive Committee and Supporting Foundation

Staff Report

Subject: Professional Services Agreement with PFM Financial Advisors
Contact: Casey Dailey, Director of Energy & Environmental Programs, cdailey@wrcog.us, (951) 405-6720
Date: May 6, 2024

Recommended Action(s):

1. Authorize the Executive Director to enter into a Professional Services Agreement, subject to legal review and approval, with PFM Financial Advisors.
-

Summary:

WRCOG regularly contracts with and utilizes a variety of consultants that provide services to support, manage, and implement its Property Assessed Clean Energy (PACE) and Regional Streetlight Programs. Currently, PFM Financial Advisors provides financial advisory services on an as-needed basis to support WRCOG's residential PACE Program, Commercial PACE (C-PACE) Program, and the Regional Streetlight Program. Staff are seeking approval of a new Professional Services Agreement with PFM Financial Advisors that would commence on July 1, 2024, and expire on June 30, 2029.

Purpose / WRCOG 2022-2027 Strategic Plan Goal:

The purpose of this item is to authorize a new Professional Services Agreement (PSA) with PFM Financial Advisors to provide debt issuance and financial programs' development, operations, funding, ongoing management, and other financial advisory services on an as-needed basis to support WRCOG's residential PACE Program, C-PACE Program, and the Regional Streetlight Program.

This item aligns with WRCOG's 2022-2027 Strategic Plan Goal #5 (Develop projects and programs that improve infrastructure and sustainable development in our subregion).

Discussion:

Background

Over the last decade, PFM Financial Advisors (PFM) has provided debt issuance and financial programs' development, operations, funding, ongoing management, and other financial advisory services on an as-needed basis for the residential PACE, C-PACE, and Regional Streetlight Programs. The current PSA

with PFM expires on June 30, 2024, and does not have any additional term extensions permitted under WRCOG's existing contracting policy. Staff therefore determined it was appropriate to develop and release a Request for Proposals (RFP) to facilitate a new procurement.

Present Situation

On January 26, 2024, WRCOG released RFP Number 24-01, Financial Advisory Services for the Property Assessed Clean Energy (PACE) and Regional Streetlight Programs, through its online platform in PlanetBids. Proposals were due February 22, 2024. WRCOG was able to notify 54 vendors from various industries, including commercial banking, public finance activities, accounting services, and other governmental support, of the contract opportunity for financial advisory services. Only one proposal was received - that from PFM.

PFM's proposal emulates the existing services and contracted duties provided to WRCOG's residential PACE, C-PACE, and Regional Streetlight Programs. Services provided to the residential PACE and C-PACE Programs include reviewing and supporting the closing of C-PACE assessments, provide ongoing administrative and operational services for PACE bond data checks, compliance reports and fee calculations, and support of refund transactions. The Regional Streetlight Program would utilize PFM on an as-needed basis for administrative fee calculations, operations and maintenance fee calculations, preparing semi-annual invoicing for WRCOG's member agencies, review documents and ensure compliance with financing agreements, and financial analyses related to special projects and monetization opportunities.

Staff reviewed the Proposal and the only difference found between the existing contract and the proposal was updated hourly labor rates. All services and rates that would be provided to the residential PACE and C-PACE Programs remained the same as the current agreement. The Regional Streetlight Program utilizes financial advisory services on an as-needed basis and as such would be subject to the updated hourly labor rates.

Prior Action(s):

April 10, 2024: The Administration & Finance Committee recommended that the Executive Committee authorize the Executive Director to enter into a Professional Services Agreement, subject to legal review and approval, with PFM Financial Advisors.

Financial Summary:

Fees related to this PSA have a fiscal impact on three programs: Streetlights, residential PACE, and C-PACE. With respect to the Streetlight Program, fees are billed on an hourly, as-needed basis, and are included in its budget. Residential PACE fees are primarily related to the annual fee, where PFM receives \$1.50 per outstanding assessment, and is not paid through WRCOG's budget, but paid directly to PFM when the annual fees are received. Additional services, if needed, are outlined in Exhibit C of the Agreement. Lastly, C-PACE fees are paid on a scale, noted in Exhibit C of the Agreement, based on the total assessment amount. PFM also receives \$100 per outstanding assessment on an annual basis.

Attachment(s):

[Attachment 1 - WRCOG Professional Services Agreement with PFM Financial Advisors](#)

WESTERN RIVERSIDE COUNCIL OF GOVERNMENTS PROFESSIONAL SERVICES AGREEMENT

1. PARTIES AND DATE.

This Agreement is made and entered into this 6th day of May, 2024, by and between the Western Riverside Council of Governments, a California public agency ("WRCOG"), and PFM Financial Advisors LLC, a Limited Liability Company ("Consultant"). WRCOG and Consultant are sometimes individually referred to as "Party" and collectively as "Parties."

2. RECITALS.

2.1 Consultant.

Consultant desires to perform and assume responsibility for the provision of certain professional services required by WRCOG on the terms and conditions set forth in this Agreement. Consultant represents that it is experienced in providing services as a financial advisor is licensed in the State of California, and is familiar with the plans of WRCOG.

2.2 Project.

WRCOG desires to engage Consultant to render such professional services for the Property Assessed Clean Energy (PACE) Program and the Regional Streetlight Program ("Project") as set forth in this Agreement.

3. TERMS.

3.1 Scope of Services and Term.

3.1.1 General Scope of Services. Consultant promises and agrees to furnish to WRCOG all labor, materials, tools, equipment, services, and incidental and customary work necessary to fully and adequately supply the financial advisory services necessary for the Project ("Services"). The Services are more particularly described in Exhibit "A" attached hereto and incorporated herein by reference, and which are stated in the proposal to WRCOG and approved by WRCOG's Executive Committee. All Services shall be subject to, and performed in accordance with, this Agreement, the exhibits attached hereto and incorporated herein by reference, and all applicable local, state and federal laws, rules and regulations.

3.1.2 Term. The term of this Agreement shall be from July 1, 2024 to June 30, 2029 unless earlier terminated as provided herein. Consultant shall complete the Services within the term of this Agreement and shall meet any other established schedules and deadlines.

3.2 Responsibilities of Consultant.

3.2.1 Control and Payment of Subordinates; Independent Contractor. The Services shall be performed by Consultant or under its supervision. Consultant will determine the means, methods, and details of performing the Services subject to the requirements of this Agreement. WRCOG retains Consultant on an independent contractor basis and not as an employee. Consultant retains the right to perform similar or different services for others during the term of this Agreement. Any additional personnel performing the Services under this

Agreement on behalf of Consultant shall also not be employees of WRCOG and shall at all times be under Consultant's exclusive direction and control. Consultant shall pay all wages, salaries, and other amounts due such personnel in connection with their performance of Services under this Agreement and as required by law. Consultant shall be responsible for all reports and obligations respecting such additional personnel, including, but not limited to, social security taxes, income tax withholding, unemployment insurance, disability insurance, and workers' compensation insurance.

3.2.2 Schedule of Services. Consultant shall perform the Services expeditiously, within the term of this Agreement. Consultant represents that it has the professional and technical personnel required to perform the Services in conformance with such conditions. In order to facilitate Consultant's performance of the Services, WRCOG shall respond to Consultant's submittals in a timely manner.

3.2.3 Conformance to Applicable Requirements. All work prepared by Consultant shall be subject to the approval of WRCOG.

3.2.4 Substitution of Key Personnel. Consultant has represented to WRCOG that certain key personnel will perform and coordinate the Services under this Agreement. Should one or more of such personnel become unavailable, Consultant may substitute other personnel of at least equal competence upon written approval of WRCOG. In the event that WRCOG and Consultant cannot agree as to the substitution of key personnel, WRCOG shall be entitled to terminate this Agreement for cause. As discussed below, any personnel who fail or refuse to perform the Services in a manner acceptable to WRCOG, or who are determined by the WRCOG to be uncooperative, incompetent, a threat to the adequate or timely completion of the Project, or a threat to the safety of persons or property, shall be promptly removed from the Project by the Consultant at the request of the WRCOG. The key personnel for performance of this Agreement are as follows:

Michael Berwanger, Faisal Alif, Jonathan Wang, Todd Fraizer

3.2.5 WRCOG's Representative. WRCOG hereby designates Casey Dailey or his or her designee, to act as its representative for the performance of this Agreement ("WRCOG's Representative"). WRCOG's Representative shall have the power to act on behalf of WRCOG for all purposes under this Contract. Consultant shall not accept direction or orders from any person other than WRCOG's Representative or his or her designee.

3.2.6 Consultant's Representative. Consultant hereby designates Michael Berwanger, or his or her designee, to act as its Representative for the performance of this Agreement ("Consultant's Representative"). Consultant's Representative shall have full authority to represent and act on behalf of the Consultant for all purposes under this Agreement. The Consultant's Representative shall supervise and direct the Services, using his best skill and attention, and shall be responsible for all means, methods, techniques, sequences, and procedures, and for the satisfactory coordination of all portions of the Services under this Agreement.

3.2.7 Coordination of Services. Consultant agrees to work closely with WRCOG staff in the performance of Services and shall be available to WRCOG's staff, consultants, and other staff at all reasonable times.

3.2.8 Standard of Care; Performance of Employees. Consultant shall perform all

Services under this Agreement in a skillful and competent manner, consistent with the standards generally recognized as being employed by professionals in the same discipline in the State of California. Consultant represents and maintains that it is skilled in the professional calling necessary to perform the Services. Consultant warrants that all employees and sub- contractors shall have sufficient skill and experience to perform the Services assigned to them. Finally, Consultant represents that it, its employees and sub-contractors have all licenses, permits, qualifications, and approvals of whatever nature that are legally required to perform the Services, and that such licenses and approvals shall be maintained throughout the term of this Agreement. As provided for in the indemnification provisions of this Agreement, Consultant shall perform, at its own cost and expense, and without reimbursement from WRCOG, any services necessary to correct errors or omissions which are caused by the Consultant's failure to comply with the standard of care provided for herein. Any employee of the Consultant or its sub-consultants who is determined by WRCOG to be uncooperative, incompetent, a threat to the adequate or timely completion of the Project, a threat to the safety of persons or property, or any employee who fails or refuses to perform the Services in a manner acceptable to WRCOG, shall be promptly removed from the Project by the Consultant and shall not be re-employed to perform any of the Services or to work on the Project.

3.2.9 Laws and Regulations. Consultant shall keep itself fully informed of and in compliance with all local, state and federal laws, rules and regulations in any manner affecting the performance of the Project or the Services, including all Cal OSHA requirements, and shall give all notices required by law. Consultant shall be liable for all violations of such laws and regulations in connection with Services. If the Consultant performs any work knowing it to be contrary to such laws, rules, and/or regulations, and without giving written notice to WRCOG, Consultant shall be solely responsible for all costs arising therefrom. Consultant shall defend, indemnify, and hold WRCOG, its Directors, officials, officers, employees, volunteers and agents free and harmless, pursuant to the indemnification provisions of this Agreement, from any claim or liability arising out of any failure or alleged failure to comply with such laws, rules or regulations.

3.2.10 Insurance.

3.2.10.1 Time for Compliance. Consultant shall not commence the Services under this Agreement until it has provided evidence satisfactory to WRCOG that it has secured all insurance required under this section, in a form and with insurance companies acceptable to WRCOG. In addition, Consultant shall not allow any sub-contractor to commence work on any subcontract until it has provided evidence satisfactory to WRCOG that the sub-contractor has secured all insurance required under this section.

3.2.10.2 Minimum Requirements. Consultant shall, at its expense, procure and maintain for the duration of the Agreement, insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the Agreement by the Consultant, its agents, representatives, employees or sub-contractors. Consultant shall also require all of its sub-contractors to procure and maintain the same insurance for the duration of the Agreement. Such insurance shall meet at least the following minimum levels of coverage:

(A) Minimum Scope of Insurance. Coverage shall be at least as broad as the latest version of the following: (1) *General Liability*: Insurance Services Office Commercial General Liability coverage (occurrence form CG 0001 or exact equivalent); (2) *Automobile Liability*: Insurance Services Office Business Auto Coverage (form CA 0001, code 1 (any auto) or exact equivalent); and (3) *Workers' Compensation and Employer's Liability*: Workers' Compensation insurance as required by the State of California and Employer's Liability Insurance.

(B) Minimum Limits of Insurance. Consultant shall maintain limits no less than: (1) *General Liability*: \$1,000,000 per occurrence for bodily injury, personal injury and property damage. If Commercial General Liability Insurance or other form with general aggregate limit is used, either the general aggregate limit shall apply separately to this Agreement / location or the general aggregate limit shall be twice the required occurrence limit; (2) *Automobile Liability*: \$1,000,000 per accident for bodily injury and property damage; and (3) *Workers' Compensation and Employer's Liability*: Workers' Compensation limits as required by the Labor Code of the State of California. Employer's Liability limits of \$1,000,000 per accident for bodily injury or disease.

3.2.10.3 Professional Liability. Consultant shall procure and maintain, and require its sub-consultants to procure and maintain, for a period of five (5) years following completion of the Services, errors and omissions liability insurance appropriate to their profession. Such insurance shall be in an amount not less than \$2,000,000 per claim. "Covered Professional Services" as designated in the policy must specifically include work performed under this Agreement. The policy must "pay on behalf of" the insured and must include a provision establishing the insurer's duty to defend.

3.2.10.4 Insurance Endorsements. The insurance policies shall contain the following provisions, or Consultant shall provide endorsements on forms supplied or approved by WRCOG to add the following provisions to the insurance policies:

(A) General Liability.

(i) Commercial General Liability Insurance must include coverage for (1) Bodily Injury and Property Damage; (2) Personal Injury / Advertising Injury; (3) Premises / Operations Liability; (4) Products / Completed Operations Liability; (5) Aggregate Limits that Apply per Project; (6) Explosion, Collapse and Underground (UCX) exclusion deleted; (7) Contractual Liability with respect to this Agreement; (8) Broad Form Property Damage.

(ii) The policy shall contain no endorsements or provisions limiting coverage for (1) contractual liability; (2) cross liability exclusion for claims or suits by one insured against another; or (3) contain any other exclusion contrary to the Agreement.

(iii) The policy shall give WRCOG, its Directors, officials, officers, employees, volunteers and agents insured status using ISO endorsement forms 20 10 10 01 and 20 37 10 01, or endorsements providing the exact same coverage.

(iv) The additional insured coverage under the policy shall be "primary and non-contributory" and will not seek contribution from WRCOG's insurance or self-insurance and shall be at least as broad as CG 20 01 04 13, or endorsements providing the exact same coverage.

(B) Automobile Liability.

(i) The automobile liability policy shall be endorsed to state that: (1) WRCOG, its Directors, officials, officers, employees, agents and volunteers shall be covered as additional insureds with respect to the ownership, operation, maintenance, use, of any auto owned, leased, hired, or borrowed by the Consultant or for which the Consultant is

responsible; and (2) the insurance coverage shall be primary insurance as respects WRCOG, its Directors, officials, officers, employees, agents, and volunteers, or if excess, shall stand in an unbroken chain of coverage excess of the Consultant's scheduled underlying coverage. Any insurance or self-insurance maintained by WRCOG, its Directors, officials, officers, employees, agents, and volunteers shall be in excess of the Consultant's insurance and shall not be called upon to contribute with it in any way.

(C) Workers' Compensation and Employers Liability Coverage.

(i) Consultant certifies that he/she is aware of the provisions of Section 3700 of the California Labor Code which requires every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of that code, and he/she will comply with such provisions before commencing work under this Agreement.

(ii) The insurer shall agree to waive all rights of subrogation against WRCOG, its Directors, officials, officers, employees, agents, and volunteers for losses paid under the terms of the insurance policy which arise from work performed by the Consultant.

(D) All Coverages. Defense costs shall be payable in addition to the limits set forth hereunder. Requirements of specific coverage or limits contained in this section are not intended as a limitation on coverage, limits, or other requirement, or a waiver of any coverage normally provided by any insurance. It shall be a requirement under this Agreement that any available insurance proceeds broader than or in excess of the specified minimum insurance coverage requirements and/or limits set forth herein shall be available to WRCOG, its Directors, officials, officers, employees, volunteers and agents as additional insureds under said policies. Furthermore, the requirements for coverage and limits shall be (1) the minimum coverage and limits specified in this Agreement; or (2) the broader coverage and maximum limits of coverage of any Insurance policy or proceeds available to the named insured; whichever is greater.

(i) The limits of insurance required in this Agreement may be satisfied by a combination of primary and umbrella or excess insurance. Any umbrella or excess insurance shall contain or be endorsed to contain a provision that such coverage shall also apply on a primary and non-contributory basis for the benefit of WRCOG (if agreed to in a written contract or agreement) before WRCOG's own insurance or self-insurance shall be called upon to protect it as a named insured. The umbrella / excess policy shall be provided on a "following form" basis with coverage at least as broad as provided on the underlying policy(ies).

(ii) Consultant shall provide WRCOG at least thirty (30) days prior written notice of cancellation of any policy required by this Agreement, except that the Consultant shall provide at least ten (10) days prior written notice of cancellation of any such policy due to non-payment of premium. If any of the required coverage is cancelled or expires during the term of this Agreement, the Consultant shall deliver renewal certificate(s) including the General Liability Additional Insured Endorsement to WRCOG at least ten (10) days prior to the effective date of cancellation or expiration.

(iii) The retroactive date (if any) of each policy is to be no later than the effective date of this Agreement. Consultant shall maintain such coverage continuously for a period of at least three years after the completion of the work under this

Agreement. Consultant shall purchase a one (1) year extended reporting period A) if the retroactive date is advanced past the effective date of this Agreement; B) if the policy is cancelled or not renewed; or C) if the policy is replaced by another claims-made policy with a retroactive date subsequent to the effective date of this Agreement.

(iv) The foregoing requirements as to the types and limits of insurance coverage to be maintained by Consultant, and any approval of said insurance by WRCOG, is not intended to and shall not in any manner limit or qualify the liabilities and obligations otherwise assumed by the Consultant pursuant to this Agreement, including but not limited to, the provisions concerning indemnification.

(v) If at any time during the life of the Agreement, any policy of insurance required under this Agreement does not comply with these specifications or is canceled and not replaced, WRCOG has the right but not the duty to obtain the insurance it deems necessary, and any premium paid by WRCOG will be promptly reimbursed by Consultant or WRCOG will withhold amounts sufficient to pay premium from Consultant payments. In the alternative, WRCOG may cancel this Agreement. WRCOG may require the Consultant to provide complete copies of all insurance policies in effect for the duration of the Project.

(vi) Neither WRCOG nor any of its Directors, officials, officers, employees, volunteers or agents shall be personally responsible for any liability arising under or by virtue of this Agreement.

3.2.10.5 Separation of Insureds; No Special Limitations. All insurance required by this Section shall contain standard separation of insureds provisions. In addition, such insurance shall not contain any special limitations on the scope of protection afforded to WRCOG, its Directors, officials, officers, employees, agents, and volunteers.

3.2.10.6 Deductibles and Self-Insurance Retentions. Any deductibles or self-insured retentions must be declared to and approved by WRCOG. Consultant shall guarantee that, at the option of WRCOG, either: (1) the insurer shall reduce or eliminate such deductibles or self-insured retentions as respects WRCOG, its Directors, officials, officers, employees, agents, and volunteers; or (2) the Consultant shall procure a bond guaranteeing payment of losses and related investigation costs, claims, and administrative and defense expenses.

3.2.10.7 Acceptability of Insurers. Insurance is to be placed with insurers with a current A.M. Best's rating of no less than A:VII, licensed to do business in California, and satisfactory to WRCOG.

3.2.10.8 Verification of Coverage. Consultant shall furnish WRCOG with original certificates of insurance and endorsements effecting coverage required by this Agreement on forms satisfactory to WRCOG. The certificates and endorsements for each insurance policy shall be signed by a person authorized by that insurer to bind coverage on its behalf and shall be on forms provided by WRCOG if requested. All certificates and endorsements must be received and approved by WRCOG before work commences. WRCOG reserves the right to require complete, certified copies of all required insurance policies, at any time.

3.2.10.9 Sub-consultant Insurance Requirements. Consultant shall not allow any sub-contractors or sub-consultants to commence work on any sub-contract until they have provided evidence satisfactory to WRCOG that they have secured all insurance

required under this section. Policies of commercial general liability insurance provided by such sub-contractors or sub-consultants shall be endorsed to name WRCOG as an additional insured using ISO Form CG 20 38 04 13 or an endorsement providing the exact same coverage. If requested by Consultant, WRCOG may approve different scopes or minimum limits of insurance for particular sub-contractors or sub-consultants.

3.2.11 Safety. Consultant shall execute and maintain its work so as to avoid injury or damage to any person or property. In carrying out its Services, the Consultant shall at all times be in compliance with all applicable local, state, and federal laws, rules, and regulations, and shall exercise all necessary precautions for the safety of employees appropriate to the nature of the work and the conditions under which the work is to be performed. Safety precautions as applicable shall include, but shall not be limited to: (A) adequate life protection and life-saving equipment and procedures; (B) instructions in accident prevention for all employees and sub-contractors, such as safe walkways, scaffolds, fall protection ladders, bridges, gang planks, confined space procedures, trenching and shoring, equipment, and other safety devices, equipment and wearing apparel as are necessary or lawfully required to prevent accidents or injuries; and (C) adequate facilities for the proper inspection and maintenance of all safety measures.

3.3 Fees and Payments.

3.3.1 Compensation. Consultant shall receive compensation, including authorized reimbursements, for all Services rendered under this Agreement at the rates set forth in Exhibit "B" attached hereto and incorporated herein by reference. Extra Work may be authorized, as described below, and, if authorized, said Extra Work will be compensated at the rates and manner set forth in this Agreement.

3.3.2 Payment of Compensation. Consultant shall submit to WRCOG a monthly itemized statement which indicates work completed and hours of Services rendered by Consultant. The statement shall contain the invoice number and date; remittance address; Agreement number 2024-67-5000-001, and invoice total. The statement shall describe the amount of Services and supplies provided since the initial commencement date, or since the start of the subsequent billing periods, as appropriate, through the date of the statement. WRCOG shall, within 45 days of receiving such statement, review the statement and pay all approved charges thereon.

3.3.3 Reimbursement for Expenses. Consultant shall not be reimbursed for any expenses unless authorized in writing by WRCOG.

3.3.4 Extra Work. At any time during the term of this Agreement, WRCOG may request that Consultant perform Extra Work. As used herein, "Extra Work" means any work which is determined by WRCOG to be necessary for the proper completion of the Project, but which the Parties did not reasonably anticipate would be necessary at the execution of this Agreement. Consultant shall not perform, nor be compensated for, Extra Work without written authorization from WRCOG's Representative.

3.3.5 Prevailing Wages. Consultant is aware of the requirements of California Labor Code Sections 1720, et seq., and 1770, et seq., as well as California Code of Regulations, Title 8, Section 16000, et seq., ("Prevailing Wage Laws"), which require the payment of prevailing wage rates and the performance of other requirements on certain "public works" and "maintenance" projects. If the Services are being performed as part of an applicable "public works" or "maintenance" project, as defined by the Prevailing Wage Laws, and if the total

compensation is \$1,000 or more, Consultant agrees to fully comply with such Prevailing Wage Laws. WRCOG shall provide Consultant with a copy of the prevailing rates of per diem wages in effect at the commencement of this Agreement. Consultant shall make copies of the prevailing rates of per diem wages for each craft, classification, or type of worker needed to execute the Services available to interested parties upon request, and post copies at the Consultant's principal place of business and at the project site. Consultant shall defend, indemnify, and hold WRCOG, its Directors, officials, officers, employees, volunteers, and agents free and harmless from any claims, liabilities, costs, penalties or interest arising out of any failure or alleged failure to comply with the Prevailing Wage Laws.

3.4 Accounting Records.

3.4.1 Maintenance and Inspection. Consultant shall maintain complete and accurate records with respect to all costs and expenses incurred under this Agreement. All such records shall be clearly identifiable. Consultant shall allow a representative of WRCOG during normal business hours to examine, audit, and make transcripts or copies of such records and any other documents created pursuant to this Agreement. Consultant shall allow inspection of all work, data, documents, proceedings, and activities related to the Agreement for a period of three (3) years from the date of final payment under this Agreement.

3.5 General Provisions.

3.5.1 Termination of Agreement.

3.5.1.1 Grounds for Termination. WRCOG may, by written notice to Consultant, terminate the whole or any part of this Agreement at any time and without cause by giving written notice to Consultant of such termination, and specifying the effective date thereof, at least seven (7) days before the effective date of such termination. Upon termination, Consultant shall be compensated only for those services which have been adequately rendered to WRCOG, and Consultant shall be entitled to no further compensation. Consultant may terminate this Agreement for a material breach of its terms by WRCOG upon WRCOG's failure to cure such material breach within thirty (30) days after written notice thereof.

3.5.1.2 Effect of Termination. If this Agreement is terminated as provided herein, WRCOG may require Consultant to provide all finished or unfinished Documents and Data and other information of any kind prepared by Consultant in connection with the performance of Services under this Agreement. Consultant shall be required to provide such documents and other information within fifteen (15) days of the request.

3.5.1.3 Additional Services. In the event this Agreement is terminated in whole or in part as provided herein, WRCOG may procure, upon such terms and in such manner as it may determine appropriate, services similar to those terminated.

3.5.2 Delivery of Notices. All notices permitted or required under this Agreement shall be given to the respective Parties at the following address, or at such other address as the respective parties may provide in writing for this purpose:

**Consultant: PFM Financial Advisors LLC
1150 S. Olive St., 10th Floor
Los Angeles, CA 90015
Attn: Michael Berwanger**

**WRCOG: Western Riverside Council of Governments
3390 University Avenue, Suite 200
Riverside, CA 92501
Attn: Casey Dailey**

Such notice shall be deemed made when personally delivered or when mailed, forty-eight (48) hours after deposit in the U.S. Mail, first class postage prepaid and addressed to the Party at its applicable address. Actual notice shall be deemed adequate notice on the date actual notice occurred, regardless of the method of service.

3.5.3 Ownership of Materials and Confidentiality.

3.5.3.1 Documents & Data; Licensing of Intellectual Property. This Agreement creates a non-exclusive and perpetual license for WRCOG to copy, use, modify, reuse, or sub-license any and all copyrights, designs, and other intellectual property embodied in plans, specifications, studies, drawings, estimates, and other documents or works of authorship fixed in any tangible medium of expression, including but not limited to, physical drawings or data magnetically or otherwise recorded on computer diskettes, which are prepared or caused to be prepared by Consultant under this Agreement ("Documents & Data"). Consultant shall require all sub-contractors to agree in writing that WRCOG is granted a non-exclusive and perpetual license for any Documents & Data the sub-contractor prepares under this Agreement. Consultant represents and warrants that Consultant has the legal right to license any and all Documents & Data. Consultant makes no such representation and warranty in regard to Documents & Data which were prepared by design professionals other than Consultant or provided to Consultant by WRCOG. WRCOG shall not be limited in any way in its use of the Documents & Data at any time, provided that any such use not within the purposes intended by this Agreement shall be at WRCOG's sole risk.

3.5.3.2 Intellectual Property. In addition, WRCOG shall have and retain all right, title, and interest (including copyright, patent, trade secret, and other proprietary rights) in all plans, specifications, studies, drawings, estimates, materials, data, computer programs or software and source code, enhancements, documents, and any and all works of authorship fixed in any tangible medium or expression, including but not limited to, physical drawings or other data magnetically or otherwise recorded on computer media ("Intellectual Property") prepared or developed by or on behalf of Consultant under this Agreement as well as any other such Intellectual Property prepared or developed by or on behalf of Consultant under this Agreement.

WRCOG shall have and retain all right, title and interest in Intellectual Property developed or modified under this Agreement whether or not paid for wholly or in part by WRCOG, whether or not developed in conjunction with Consultant, and whether or not developed by Consultant. Consultant will execute separate written assignments of any and all rights to the above referenced Intellectual Property upon request of WRCOG.

Consultant shall also be responsible to obtain in writing separate written assignments from any sub-contractors or agents of Consultant of any and all right to the above referenced Intellectual Property. Should Consultant, either during or following termination of this Agreement, desire to use any of the above-referenced Intellectual Property, it shall first obtain the written approval of the WRCOG.

All materials and documents which were developed or prepared by the

Consultant for general use prior to the execution of this Agreement and which are not the copyright of any other party or publicly available and any other computer applications, shall continue to be the property of the Consultant. However, unless otherwise identified and stated prior to execution of this Agreement, Consultant represents and warrants that it has the right to grant the exclusive and perpetual license for all such Intellectual Property as provided herein.

WRCOG further is granted by Consultant a non-exclusive and perpetual license to copy, use, modify or sub-license any and all Intellectual Property otherwise owned by Consultant which is the basis or foundation for any derivative, collective, insurrectional, or supplemental work created under this Agreement.

3.5.3.3 Confidentiality. All ideas, memoranda, specifications, plans, procedures, drawings, descriptions, computer program data, input record data, written information, and other Documents & Data either created by or provided to Consultant in connection with the performance of this Agreement shall be held confidential by Consultant. Such materials shall not, without the prior written consent of WRCOG, be used by Consultant for any purposes other than the performance of the Services. Nor shall such materials be disclosed to any person or entity not connected with the performance of the Services or the Project unless disclosure is required by law or judicial or regulatory process. Nothing furnished to Consultant which is otherwise known to Consultant or is generally known, or has become known, to the related industry shall be deemed confidential. Consultant shall not use WRCOG's name or insignia, photographs of the Project, or any publicity pertaining to the Services or the Project in any magazine, trade paper, newspaper, television, or radio production or other similar medium without the prior written consent of WRCOG.

3.5.3.4 Infringement Indemnification. Consultant shall defend, indemnify, and hold WRCOG, its Directors, officials, officers, employees, volunteers, and agents free and harmless, pursuant to the indemnification provisions of this Agreement, for any alleged infringement of any patent, copyright, trade secret, trade name, trademark, or any other proprietary right of any person or entity in consequence of the use on the Project by WRCOG of the Documents & Data, including any method, process, product, or concept specified or depicted.

3.5.4 Cooperation; Further Acts. The Parties shall fully cooperate with one another and shall take any additional acts or sign any additional documents as may be necessary, appropriate, or convenient to attain the purposes of this Agreement.

3.5.5 Attorney's Fees. If either Party commences an action against the other Party, either legal, administrative, or otherwise, arising out of or in connection with this Agreement, the prevailing party in such litigation shall be entitled to have and recover from the losing party reasonable attorney's fees and all other costs of such action.

3.5.6 Indemnification. Consultant shall defend, indemnify, and hold WRCOG, its Directors, officials, officers, consultants, employees, volunteers, and agents free and harmless from any and all claims, demands, causes of action, costs, expenses, liability, loss, damage or injury, in law or equity, to property or persons, including wrongful death, in any manner arising out of or incident to any alleged negligent acts, omissions, or willful misconduct of Consultant, its officials, officers, employees, agents, consultants and contractors, arising out of or in connection with the performance of the Services, the Project or this Agreement, including without limitation attorneys' fees and other related costs and expenses. Consultant shall defend, at Consultant's own cost, expense, and risk, any and all such aforesaid suits, actions, or other legal proceedings of every kind that may be brought or instituted against WRCOG, its Directors, officials, officers,

consultants, employees, agents or volunteers. Consultant shall pay and satisfy any judgment, award, or decree that may be rendered against WRCOG or its Directors, officials, officers, consultants, employees, agents, or volunteers, in any such suit, action or other legal proceeding. Consultant shall reimburse WRCOG and its Directors, officials, officers, consultants, employees, agents, or volunteers, for any and all legal expenses and costs, including reasonable attorneys' fees, incurred by each of them in connection therewith or in enforcing the indemnity herein provided. Consultant's obligation to indemnify shall not be restricted to insurance proceeds, if any, received by WRCOG, its Directors, officials, officers, consultants, employees, agents, or volunteers. This section shall survive any expiration or termination of this Agreement. Notwithstanding the foregoing, to the extent Consultant's Services are subject to Civil Code Section 2782.8, the above indemnity shall be limited, to the extent required by Civil Code Section 2782.8, to claims that arise out of, pertain to, or relate to the negligence, recklessness, or willful misconduct of the Consultant.

3.5.7 Entire Agreement. This Agreement contains the entire Agreement of the Parties with respect to the subject matter hereof, and supersedes all prior negotiations, understandings or agreements. This Agreement may only be modified by a writing signed by both Parties.

3.5.8 Governing Law. This Agreement shall be governed by the laws of the State of California. Venue shall be in Riverside County.

3.5.9 Time of Essence. Time is of the essence for each and every provision of this Agreement.

3.5.10 WRCOG's Right to Employ Other Consultants. WRCOG reserves the right to employ other consultants in connection with this Project.

3.5.11 Successors and Assigns. This Agreement shall be binding on the successors and assigns of the Parties.

3.5.12 Assignment or Transfer. Consultant shall not assign, hypothecate, or transfer, either directly or by operation of law, this Agreement or any interest herein without the prior written consent of WRCOG. Any attempt to do so shall be null and void, and any assignees, hypothecates or transferees shall acquire no right or interest by reason of such attempted assignment, hypothecation or transfer.

3.5.13 Construction; References; Captions. Since the Parties or their agents have participated fully in the preparation of this Agreement, the language of this Agreement shall be construed simply, according to its fair meaning, and not strictly for or against any Party. Any term referencing time, days, or period for performance shall be deemed calendar days and not work days. All references to Consultant include all personnel, employees, agents, and sub-contractors of Consultant, except as otherwise specified in this Agreement. All references to WRCOG include its Directors, officials, officers, employees, agents, and volunteers except as otherwise specified in this Agreement. The captions of the various articles and paragraphs are for convenience and ease of reference only, and do not define, limit, augment, or describe the scope, content, or intent of this Agreement.

3.5.14 Amendment; Modification. No supplement, modification, or amendment of this Agreement shall be binding unless executed in writing and signed by both Parties.

3.5.15 Waiver. No waiver of any default shall constitute a waiver of any other default or breach, whether of the same or other covenant or condition. No waiver, benefit, privilege, or service voluntarily given or performed by a Party shall give the other Party any contractual rights by custom, estoppel, or otherwise.

3.5.16 No Third-Party Beneficiaries. There are no intended third-party beneficiaries of any right or obligation assumed by the Parties.

3.5.17 Invalidity; Severability. If any portion of this Agreement is declared invalid, illegal, or otherwise unenforceable by a court of competent jurisdiction, the remaining provisions shall continue in full force and effect.

3.5.18 Prohibited Interests. Consultant maintains and warrants that it has not employed nor retained any company or person, other than a bona fide employee working solely for Consultant, to solicit or secure this Agreement. Further, Consultant warrants that it has not paid nor has it agreed to pay any company or person, other than a bona fide employee working solely for Consultant, any fee, commission, percentage, brokerage fee, gift, or other consideration contingent upon or resulting from the award or making of this Agreement. For breach or violation of this warranty, WRCOG shall have the right to rescind this Agreement without liability. For the term of this Agreement, no member, Director, officer, official, agent volunteer, or employee of WRCOG, during the term of his or her service with WRCOG, shall have any direct interest in this Agreement, or obtain any present or anticipated material benefit arising therefrom.

3.5.19 Equal Opportunity Employment. Consultant represents that it is an equal opportunity employer, and it shall not discriminate against any sub-contractor, employee, or applicant for employment because of race, religion, color, national origin, handicap, ancestry, sex, or age. Such non-discrimination shall include, but not be limited to, all activities related to initial employment, upgrading, demotion, transfer, recruitment or recruitment advertising, layoff, or termination. Consultant shall also comply with all relevant provisions of any of WRCOG's Minority Business Enterprise Program, Affirmative Action Plan, or other related programs or guidelines currently in effect or hereinafter enacted.

3.5.20 Labor Certification. By its signature hereunder, Consultant certifies that it is aware of the provisions of Section 3700 of the California Labor Code which requires every employer to be insured against liability for Workers' Compensation, or to undertake self-insurance in accordance with the provisions of that Code, and agrees to comply with such provisions before commencing the performance of the Services.

3.5.21 Authority to Enter Agreement. Consultant has all requisite power and authority to conduct its business and to execute, deliver, and perform the Agreement. Each Party warrants that the individuals who have signed this Agreement have the legal power, right, and authority to make this Agreement and bind each respective Party.

3.5.22 Counterparts. This Agreement may be signed in counterparts, each of which shall constitute an original.

3.6 Subcontracting.

3.6.1 Prior Approval Required. Consultant shall not subcontract any portion of the work required by this Agreement, except as expressly stated herein, without prior written approval of WRCOG. Subcontracts, if any, shall contain a provision making them subject to all

provisions stipulated in this Agreement.

3.7 Municipal Advisor Provisions

3.7.1 Disclosure. Municipal Securities Rulemaking Board (the “MSRB”) Rules require that municipal advisors make written disclosures to their clients of all material conflicts of interest, certain legal or disciplinary events and certain regulatory requirements. Such disclosures are provided in Consultant’s Disclosure Statement delivered to WRCOG together with this Agreement. The parties agree that if WRCOG has designated Consultant as its independent registered municipal advisor (“IRMA”) for purposes of SEC Rule 15Ba1-1(d)(3)(vi) (the “IRMA exemption”), the services provided pursuant to such designation shall be the services described in Exhibit A hereto, subject to any agreed upon limitations. Verification of independence (as is required under the IRMA exemption) shall be the responsibility of such third party seeking to rely on such IRMA exemption. Consultant shall have the right to review and approve in advance any representation of Consultant’s role as IRMA to WRCOG.

3.7.2 Registered Municipal Advisor. Consultant is a registered municipal advisor with the Securities and Exchange Commission (the “SEC”) and the MSRB, pursuant to the Securities Exchange Act of 1934 Rule 15Ba1-2.

3.7.3 . Other Services. Upon request of WRCOG, an affiliate of Consultant or a third party referred or otherwise introduced by Consultant and/or designated by WRCOG may agree to additional services to be provided by such affiliate or third party under a separate writing, including separate scope and compensation, between WRCOG and such affiliate of Consultant or third party. For the sake of clarity, any separate agreement between Consultant and an affiliate or third party shall not in any way be deemed an amendment or modification of this Agreement.

3.7.4 Information to be Furnished to Consultant. All information, data, reports, and records in the possession of WRCOG or any third party necessary for carrying out any services to be performed under this Agreement (“Data”) shall be furnished to Consultant. Consultant may rely on the Data in connection with its provision of the services under this Agreement and the provider thereof shall remain solely responsible for the adequacy, accuracy or completeness of such Data.

[SIGNATURES ON FOLLOWING PAGE]

SIGNATURE PAGE TO
WESTERN RIVERSIDE COUNCIL OF GOVERNMENTS
PROFESSIONAL SERVICES AGREEMENT

IN WITNESS WHEREOF, the Parties hereby have made and executed this Agreement as of the date first written above.

WESTERN RIVERSIDE COUNCIL
OF GOVERNMENTS

PFM Financial Advisors LLC

By: _____
Dr. Kurt Wilson
Executive Director

By:  _____
Michael Berwanger
Title: _____
Managing Director

APPROVED AS TO FORM:

By: _____
General Counsel
Best Best & Krieger LLP

EXHIBIT “A”

SCOPE OF SERVICES

Upon written request by WRCOG, the Consultant will provide Financial Advisory Services to WRCOG’s Programs including:

A. Regional Streetlight Program:

- I. Upon request from WRCOG, provide assistance with document accuracy and compliance with lender and payment requirements.
- II. Upon request from WRCOG, assist WRCOG with invoicing, updating payment schedules, and management of ongoing expense obligations.
- III. Upon request from WRCOG, manage invoice calculations and files based on project specific model.
- IV. Upon request from WRCOG, evaluate financials and develop financial models for special projects and monetization opportunities (i.e., revenue from licensing agreements, costs for installing smart city technologies, etc.).
- V. Upon request from WRCOG, evaluate and support additional efforts of the Regional Streetlight Program.

B. Property Assessed Clean Energy (PACE) Program services, all programs:

- I. Assist WRCOG with the identification of and engagement with additional program partners, if so desired by WRCOG.
- II. Perform sizing verification for program originated assessments and aggregated bonds as needed.
- III. Provide fee, interest rate and reserve fund analysis.
- IV. Provide ongoing reporting support for internal and external purposes.
- V. Assist WRCOG in reviewing structure, sizing, timing, and negotiation of terms for additional program participants, upon WRCOG request.
- VI. Identification of refunding opportunities and full financial advisory services related to the issuance of refunding bonds, including but not limited to, data analysis and ongoing updates related to feasibility, sizing, structure and credit enhancement; identification and assistance with selection of additional financing team members; review and comment on financing documents; credit information preparation and support with rating agencies or others.
- VII. Other PACE-related services upon request.

EXHIBIT "B"

COMPENSATION BILLING RATES

Financial Advisory Hourly Rates	
PFM Employee Title	Hourly Rate
Managing Director	\$425
Director	\$375
Senior Managing Consultant	\$350
Senior Analyst	\$325
Analyst	\$300

Regional Streetlight Program: Shall be billed on an hourly basis.

Residential PACE Programs: For all residential programs administered by any other third-party residential PACE program provider engaged by WRCOG during the entire term of this contract:

- \$45 per assessment closed, payable from PACE proceeds.

Residential Ongoing PACE Services: For all residential programs administered by WRCOG, for ongoing administrative and operational assistance:

- \$1.50 per outstanding assessment, calculated each June 30, beginning June 30, 2024

Work performed to include the following:

- PACE Funding Bond Data Checks
- CDIAC Reporting Support
- CAEATFA Reporting Support
- Trustee Engagement Support
- Annual Admin Fee Calculations
- Delinquent Purchases Support
- Good Faith Estimate Calculations
- Provider Fee Change Inquiries and Calculations

Any additional work requested by WRCOG will be billed at the Hourly Rates listed above. PFM will not bill hourly work without the explicit approval of Casey Dailey or another designated member of WRCOG staff.

Commercial PACE Programs: For all commercial programs administered by any third-party commercial PACE program provider engaged by WRCOG during the entire term of this contract:

- \$2,500 per assessment closed for bonds greater than \$500,000 and less than \$2 million.
- \$5,000 per assessment closed for bonds greater than or equal to \$2 million and less than \$20 million.
- \$7,500 per assessment closed for bonds great than or equal to \$20 million.
- For any assessment less than \$500,000, PFM's fee shall be based on the following schedule:

Assessment Amount:	PFM Fee:
\$100,000	\$500
\$125,000	\$625
\$150,000	\$750
\$175,000	\$875
\$200,000	\$1,000
\$225,000	\$1,125
\$250,000	\$1,250
\$275,000	\$1,375
\$300,000	\$1,500
\$325,000	\$1,625
\$350,000	\$1,750
\$375,000	\$1,875
\$400,000	\$2,000
\$425,000	\$2,125
\$450,000	\$2,250
\$475,000	\$2,375

Commercial Ongoing PACE Services: For all commercial programs administered by WRCOG, for ongoing administrative and operational assistance:

- \$100 per outstanding assessment, calculated each June 30th

Residential PACE Program Refunding Bonds: Upon successful closing of a refunding transaction for all or a portion of outstanding PACE bonds in order to provide savings and administrative efficiency to WRCOG.

At closing, payable from transaction proceeds:

- \$65,000 for transaction par amount less than \$50 million
- \$85,000 for transaction par amount greater than \$50 million and less than \$100 million
- \$100,000 for transaction part amount greater than \$100 million and less than \$300 million
- \$200,000 for transaction par amount greater than \$300 million

Commercial PACE Program Refunding Bonds: Upon successful closing of a refunding transaction for all or a portion of outstanding Commercial PACE bonds in order to provide savings and administrative efficiency to WRCOG.

At closing, payable from transaction proceeds:

- \$65,000 for all transactions greater than \$5,000,000
- For any transactions less than \$5,000,000, a fee will be negotiated directly with WRCOG and paid out of transaction proceeds.

EXPENSES

In addition to the hourly and transaction fees described above, PFM shall be reimbursed for out-of-pocket expenses on an actual cost basis (i.e., we do not charge a multiplier on expenses). Such expenses include items such as travel, meals, postage, and express mail delivery charges.

**DISCLOSURE OF CONFLICTS OF INTEREST AND OTHER
IMPORTANT MUNICIPAL ADVISORY INFORMATION
PFM Financial Advisors LLC**

I. Introduction

PFM Financial Advisors LLC and PFM Swap Advisors LLC (hereinafter, referred to as “We,” “Us,” or “Our”) are registered municipal advisors with the Securities and Exchange Commission (the “SEC”) and the Municipal Securities Rulemaking Board (the “MSRB”), pursuant to the Securities Exchange Act of 1934 Rule 15Ba1-2. In accordance with MSRB rules, this disclosure statement is provided by Us to each client prior to the execution of its advisory agreement with written disclosures of all material conflicts of interests and legal or disciplinary events that are required to be disclosed with respect to providing financial advisory services pursuant to MSRB Rule G-42(b) and (c) (ii). We employ a number of resources to identify and subsequently manage actual or potential conflicts of interest in addition to disclosing actual and potential conflicts of interest provided herein.

How We Identify and Manage Conflicts of Interest

Code of Ethics. The Code requires that all employees conduct all aspects of Our business with the highest standards of integrity, honesty and fair dealing. All employees are required to avoid even the appearance of misconduct or impropriety and avoid actual or apparent conflicts of interest between personal and professional relationships that would or could interfere with an employee’s independent exercise of judgment in performing the obligations and responsibilities owed to a municipal advisor and Our clients.

Policies and Procedures. We have adopted policies and procedures that include specific rules and standards for conduct. Some of these policies and procedures provide guidance and reporting requirements about matters that allows Us to monitor behavior that might give rise to a conflict of interest. These include policies concerning the making of gifts and charitable contributions, entertaining clients, and engaging in outside activities, all of which may involve relationships with clients and others that are important to Our analysis of potential conflicts of interest.

Supervisory Structure. We have both a compliance and supervisory structure in place that enables Us to identify and monitor employees’ activities, both on a transaction and Firm-wide basis, to ensure compliance with appropriate standards. Prior to undertaking any engagement with a new client or an additional engagement with an existing client, appropriate municipal advisory personnel will review the possible intersection of the client’s interests, the proposed engagement, Our engagement personnel, experience and existing obligations to other clients and related parties. This review, together with employing the resources described above, allows Us to evaluate any situations that may be an actual or potential conflict of interest.

Disclosures. We will disclose to clients those situations that We believe would create a material conflict of interest, such as: 1) any advice, service or product that any affiliate may provide to a client that is directly related to the municipal advisory work We perform for such client; 2) any payment made to obtain or retain a municipal advisory engagement with a client; 3) any fee-splitting arrangement with any provider of an investment or services to a client; 4) any conflict that may arise from the type of compensation arrangement We may have with a client; and 5) any other actual or potential situation that We are or become aware of that might constitute a material conflict of interest that could reasonably expect to impair Our ability to provide advice to or on behalf of clients consistent with regulatory requirements. If We identify such situations or circumstances, We will prepare meaningful disclosure that will describe the implications of the situation and how We intend to manage the situation. We will also disclose any legal or disciplinary events that are material to a client’s evaluation or the integrity of Our management or advisory personnel. We will provide this disclosure (or a means to access this information) in writing prior to starting Our proposed engagement, and will provide such additional information or clarification as the client may request. We will also advise Our clients in writing of any subsequent material conflict of interest that may arise, as well as the related implications, Our plan to manage that situation, and any additional information such client may require.

II. General Conflict of Interest Disclosures

Disclosure of Conflicts Concerning the Firm's Affiliates

Our affiliates offer a wide variety of financial services, and Our clients may be interested in pursuing services separately provided by an affiliate. The affiliate's business with the client could create an incentive for Us to recommend a course of action designed to increase the level of the client's business activities with the affiliate or to recommend against a course of action that would reduce the client's business activities with the affiliate. In either instance, We may be perceived as recommending services for a client that are not in the best interests of Our clients, but rather are in Our interests or the interests of Our affiliates. Accordingly, We mitigate any perceived conflict of interest that may arise in this situation by disclosing it to the client, and by requiring that there be a review of the municipal securities transaction or municipal financial product to ensure that it is suitable for the client in light of various factors, after reasonable inquiry, including the client's needs, objectives and financial circumstances. Further, We receive no compensation from Our affiliates with respect to a client introduction or referral. If a client chooses to work with an affiliate, We require that the client consult and enter into a separate agreement for services, so that the client can make an independent, informed, evaluation of the services offered.

Disclosure of Conflicts Related to the Firm's Compensation

From time to time, We may be compensated by a municipal advisory fee that is or will be set forth in an agreement with the client to be, or that has been, negotiated and entered into in connection with a municipal advisory service. Payment of such fee may be contingent on the closing of the transaction and the amount of the fee may be based, in whole or in part, on a percentage of the principal or par amount of municipal securities or municipal financial product. While this form of compensation is customary in the municipal securities market, it may be deemed to present a conflict of interest since We may appear to have an incentive to recommend to the client a transaction that is larger in size than is necessary. Further, We may also receive compensation in the form of a fixed fee arrangement. While this form of compensation is customary, it may also present a potential conflict of interest, if the transaction requires more work than contemplated and We are perceived as recommending a less time consuming alternative contrary to the client's best interest so as not to sustain a loss. Finally, We may contract with clients on an hourly fee basis. If We do not agree on a maximum amount of hours at the outset of the engagement, this arrangement may pose a conflict of interest as We would not have a financial incentive to recommend an alternative that would result in fewer hours. We manage and mitigate all of these types of conflicts by disclosing the fee structure to the client, and by requiring that there be a review of the municipal securities transaction or municipal financial product to ensure that it is suitable for the client in light of various factors, after reasonable inquiry, including the client's needs, objectives and financial circumstances.

Disclosure of Conflicts Related to the Firm's Compensation Structure for Our Registered Advisors. Pursuant to various employee compensation structures, from time to time We offer certain of Our registered municipal advisors ("Registered Advisors") financial benefits based on his or her business plan, client base, performance, and/or transactions closed. This provides an incentive for such Registered Advisors to seek to retain additional clients and/or transactions or services from clients. While this form of compensation may be customary in some segments of the municipal advisory market, provision of such financial benefits may be deemed to present a conflict of interest. We manage and mitigate these types of conflicts by Registered Advisor's adherence to Our Code of Ethics and Policies and Procedures, and by requiring that there be a review of the municipal securities transaction or municipal financial product to ensure that it is suitable for the client in light of various factors, after reasonable inquiry, including the client's needs, objectives and financial circumstances.

Disclosure Concerning Provision of Services to State and Local Government, and Non-Profit Clients

We regularly provide financial advisory services to state and local governments, their agencies, and instrumentalities, and non-profit clients. While Our clients have expressed that this experience in providing services to a wide variety of clients generally provides great benefit for all of Our clients, there may be or may have been clients with interests that are different from (and adverse to) other clients. If for some reason any client sees Our engagement with any other particular client as a conflict, We will mitigate this conflict by engaging in a broad range of conduct, if and as applicable. Such conduct may include one or any combination of the following: 1) disclosing the conflict to the client; 2) requiring that there be a review of the municipal securities transaction or municipal

financial product to ensure that it is suitable for the client in light of various factors, including the client's needs, objectives and financial circumstances; 3) implementing procedures that establishes an "Informational Bubble" that creates physical, technological and procedural barriers and/or separations to ensure that non-public information is isolated to particular area such that certain governmental transaction team members and supporting functions operate separately during the course of work performed; and 4) in the rare event that a conflict cannot be resolved, We will withdraw from the engagement.

Disclosure Related to Legal and Disciplinary Events

As registered municipal advisors with the Securities and Exchange Commission (the "SEC") and the Municipal Securities Rulemaking Board (the "MSRB"), pursuant to the Securities Exchange Act of 1934 Rule 15Ba1-2, Our legal, disciplinary and judicial events are required to be disclosed on Our forms MA and MA-I filed with the SEC, in 'Item 9 Disclosure Information' of form MA, 'Item 6 Disclosure Information' of form MA-I, and if applicable, the corresponding disclosure reporting page(s) ("DRP"). To review the foregoing disclosure items and material change(s) or amendment(s), if any, clients may electronically access PFM Financial Advisors LLC filed forms MA and MA-I on the SEC's Electronic Data Gathering, Analysis, and Retrieval system, listed by date of filing starting with the most recently filed, at:

PFM Financial Advisors LLC –

<http://www.sec.gov/cgi-bin/browse-edgar?company=PFM+Financial&owner=exclude&action=getcompany>

III. **Specific Conflicts of Interest Disclosures – Western Riverside Council of Governments**

To Our knowledge, following reasonable inquiry, we are not aware of any other actual or potential conflict of interest that could reasonably be anticipated to impair Our ability to provide advice to or on behalf of the client in accordance with applicable standards of conduct of MSRB Rule G-42.

IV. **Municipal Advisory Complaint and Client Education Disclosure**

The MSRB protects state and local governments and other municipal entities and the public interest by promoting fair and efficient municipal securities markets. To that end, MSRB rules are designed to govern the professional conduct of brokers, dealers, municipal securities dealers and municipal advisors. Accordingly, if you as municipal advisory customer have a complaint about any of these financial professionals, please contact the MSRB's website at www.msrb.org, and consult the MSRB's Municipal Advisory Client brochure. The MSRB's Municipal Advisory Client brochure describes the protections available to municipal advisory clients under MSRB rules, and describes the process for filing a complaint with the appropriate regulatory authority.

PFM's Financial Advisory services are provided by PFM Financial Advisors LLC. PFM's Swap Advisory services are provided by PFM Swap Advisors LLC. Both entities are registered municipal advisors with the MSRB and SEC under the Dodd Frank Act of 2010.



Western Riverside Council of Governments Joint Meeting of the WRCOG Executive Committee and Supporting Foundation

Staff Report

Subject: First Amendment to Professional Services Agreement with Best Best & Krieger for PACE Administrative and Legal Services

Contact: Tyler Masters, Program Manager, tmasters@wrcog.us, (951) 405-6732

Date: May 6, 2024

Recommended Action(s):

1. Authorize the Executive Director to execute a First Amendment to the Professional Services Agreement with Best Best & Krieger for administrative and legal services for the WRCOG PACE Programs through June 30, 2026.

Summary:

The term of the current Professional Services Agreement (PSA) with Best Best & Krieger (BB&K) for PACE administrative and legal services is active until June 30, 2024. Within the PSA, staff have options to extend the Agreement no more than two additional years. Staff is requesting to continue services with BB&K and to extend the PSA through June 30, 2026.

Purpose / WRCOG 2022-2027 Strategic Plan Goal:

The purpose of this item is to recommend that the Executive Committee authorize the Executive Director to enter into a First Amendment of the PSA with BB&K for PACE-specific administrative and legal services. This effort aligns with WRCOG's 2022-2027 Strategic Plan Goal #5 (To develop projects and programs that improve infrastructure and sustainable development in the subregion).

Discussion:

Background

In March 2015, WRCOG amended its general legal counsel agreement with BB&K to include legal services to support a statewide PACE Program, specifically, bond, special, and disclosure counsel and public finance legal services. In June 2016, this agreement was amended a third time replacing a previously amended fee schedule.

Given the number of amendments made to the contract and the number of years under contract, in accordance with WRCOG's Purchasing and Procurement Policy, staff issued a Request for Proposals

(RFP) to identify potential firms with relevant knowledge and experience to provide administrative and legal services for WRCOG's PACE Programs. The RFP was distributed on August 24, 2021. At the closure of the RFP, staff received only one proposal, from the incumbent contract holder, BB&K. On November 22, 2021, staff re-issued the RFP and received one additional interested firm. After diligent staff review and evaluation, and a report out to the Administration & Finance Committee, the Executive Committee authorized staff to enter into an agreement with BB&K.

Present Situation

Since the inception of the PACE Program, it has always been the intent that the Program pay for the services of the Program, in this case bond and legal services, through the fees of the Program. Historically, the fees that have paid for such services have come from two sources: 1) the cost of issuance of bond sales, a one-time fee provided at bond closing, and 2) annual administrative fees incurred by property owners with WRCOG PACE assessments. These fees are pass through costs paid directly from participants of the Program. With the discontinuation of WRCOG's Residential PACE Program in December 2020, this impacted the revenue to pay for bond and legal services. Bond counsel and administrative services related to the commercial portion (C-PACE) of the Program will continue to be paid through the cost of issuance of C-PACE bonds, as has been the historical practice. In 2022, this contract included a revised compensation schedule that balances and creates a consistent compensation model based upon the current assessment and prepayment volume instead of a volume of bonds issued.

	Value of Contract
Cost of Issuance	N/A
Annual Administrative Fee	\$16 per assessment
Prepayment Fee	\$20 per prepayment
Total Estimated Annual Compensation	\$486,000

One advantage to this contract is that it provides certainty as to the expenses and services to be provided. By basing the fee on the number of active assessments and prepayments, staff will be better able to project anticipated expenses associated with this contract. With roughly 21,000 residential assessments remaining, the annual Administrative Fee would be approximately \$336k. As assessments are paid off, the total number of assessments and the Fee would decline year over year. Since 2019, approximately 7,500 assessments have been prepaid each year, resulting in an approximate \$150k fee. Combined, the maximum amount of fees is approximately \$486k. This value is down from \$608k at the time of contract execution (2022) due to the decrease in outstanding assessments and decreased number of prepayments. This cost will continue to steadily decline over time as the number of outstanding assessments decline due to prepayments and fully matured assessments.

Prior Action(s):

April 10, 2024: The Administration & Finance Committee recommended that the Executive Committee authorize the Executive Director to execute a First Amendment to the Professional Services Agreement with Best Best & Krieger for administrative and legal services for the WRCOG PACE Programs through June 30, 2026.

Financial Summary:

PACE Program activities are included in the Agency's adopted Fiscal Year 2023/2024 Budget under the Energy & Environmental Department.

Attachment(s):

[Attachment 1 - First Amendment to Professional Services Agreement for PACE Administrative and Legal Services](#)

FIRST AMENDMENT TO
WESTERN RIVERSIDE COUNCIL OF GOVERNMENTS
PROFESSIONAL SERVICES AGREEMENT FOR
PACE ADMINISTRATIVE AND LEGAL SERVICES

1. PARTIES AND DATE.

This First Amendment is made and entered into this 6th day of May 2024, by and between the Western Riverside Council of Governments, a California public agency ("WRCOG") and Best Best & Krieger LLP., a bond, disclosure, and special counsel firm ("Consultant"). WRCOG and Consultant are sometimes individually referred to as "Party" and collectively as "Parties."

2. RECITALS.

2.1 Master Agreement.

WRCOG and Consultant entered into that certain Professional Services Agreement dated January 1, 2022 ("Master Agreement").

2.2 First Amendment.

WRCOG and Consultant desire to enter into this First Amendment for the purpose of extending the term of the Master Agreement.

3. TERMS.

3.1 Term.

The term of the Master Agreement shall be extended to June 30, 2026 (the "First Extended Term"), unless earlier terminated as provided in the Master Agreement.

3.2 Compensation.

Consultant shall receive compensation, including authorized reimbursements, for all Services rendered at the rates set forth in Exhibit "B" of the Master Agreement.

3.3 Continuation of Existing Provisions.

Except as amended by this First Amendment, all provisions of the Master Agreement, including without limitation the indemnity and insurance provisions, shall remain in full force and effect and shall govern the actions of the Parties under this First Amendment.

3.4 Counterparts.

This First Amendment may be executed in duplicate originals, each of which is deemed to be an original, but when taken together shall constitute one instrument.

IN WITNESS WHEREOF, the Parties hereto have made and executed this First Amendment as of the date first written above.

WESTERN RIVERSIDE COUNCIL
OF GOVERNMENTS

BEST BEST & KRIEGER LLP

By: _____
Dr. Kurt Wilson
Executive Director

By: _____
Mrunal Shah
Partner



Western Riverside Council of Governments Joint Meeting of the WRCOG Executive Committee and Supporting Foundation

Staff Report

Subject: Annual Used Oil Payment Program Authorization - Cycle 15

Contact: Mei Wu, Analyst I, mwu@wrcog.us, (951) 405-6734

Date: May 6, 2024

Recommended Action(s):

1. Adopt Resolution Number 05-24; A Resolution of the Executive Committee of the Western Riverside Council of Governments to support Regional Application – Used Oil Payment Program – 15.

Summary:

The Used Oil Payment Program (OPP) is provided by the California Department of Resources Recycling and Recovery (CalRecycle), which develops and promotes alternatives to the illegal disposal of used oil. Through the OPP grant, WRCOG's oil program performs outreach to used oil collection centers in our participating member cities. Additionally, the program conducts public education and informs the public of locally available used oil and used oil filter recycling opportunities. WRCOG prepared the online annual report for the previous fiscal year's OPP activities for all participating member agencies.

Purpose / WRCOG 2022-2027 Strategic Plan Goal:

The purpose of this item is to obtain authorization from the Executive Committee to apply for annual funding on behalf of its participating member agencies and make payments for program-related matters. This effort aligns with WRCOG's 2022-2027 Strategic Plan Goal #6.3 (Continuing to support the Solid Waste & Recycling Program).

Discussion:

Background

The California Oil Recycling Enhancement Act provides funds to cities and counties for establishing and maintaining local used oil collection programs to encourage recycling and proper disposal of used oil and oil filters. CalRecycle is responsible for administering the OPP.

WRCOG has successfully administered the regional OPP in past years on behalf of requesting member jurisdictions. OPP funds allow WRCOG to host used oil recycling events, oil filter exchanges, education

and outreach to the public, and more, on behalf of itself and the Cities of Banning, Beaumont, Calimesa, Canyon Lake, Corona, Eastvale, Hemet, Jurupa Valley, Lake Elsinore, Menifee, Murrieta, Norco, Perris, Riverside, San Jacinto, Temecula, and Wildomar.

Present Situation

Oil Payment Program - Cycle 15: During the OPP 15 cycle, WRCOG staff will host an event(s) for each participating city. Events can include an oil and used oil filter exchange (and receive a new filter at no cost) at an auto parts store where residents will receive information on where to recycle household hazardous waste (HHW), antifreeze, paint, oil, batteries, and safe medicine and sharps disposals.

Events may also be other special events that the city may provide oil recycling outreach for. WRCOG can provide participants with informational flyers, an oil drain recycling container and an oil kit that may include funnels, shop rags, microfiber rags, zip lock bags, a bucket and a bilge pad. Oil and filters may only be recycled at an auto parts store; there is no collection of oil at special events.

Adoption of the attached resolution authorizes WRCOG to act as a Regional Lead Participant on behalf of the specifically named participants and to make payments for program-related matters.

Prior Action(s):

None.

Financial Summary:

This funding pertains to the Used Oil Program activities for Fiscal Year 2024/2025, which are included in the Agency's proposed Fiscal Year 2024/2025 Budget under the Environmental Department (Fund 140).

Attachment(s):

[Attachment 1 - Resolution Number 05-24 OPP 15](#)

[Attachment 2 - Letter of Designation](#)

Attachment

A Resolution to Support Regional
Application – Used Oil Payment
Program - 15

RESOLUTION NUMBER 05-24

A RESOLUTION OF THE EXECUTIVE COMMITTEE OF THE WESTERN RIVERSIDE COUNCIL OF GOVERNMENTS TO SUPPORT REGIONAL APPLICATION - USED OIL PAYMENT PROGRAM - 15

WHEREAS, the Western Riverside Council of Governments ("WRCOG") is a joint powers authority consisting of the County of Riverside and 18 cities, the Eastern Municipal Water District, the Western Municipal Water District, and the Riverside County Superintendent of Schools, situated in Western Riverside County; and

WHEREAS, the Western Riverside Council of Governments operates on a fiscal year basis, beginning on July 1 of each year and continuing until June 30 of the succeeding year; and pursuant to Public Resource Code § 48690, the Department of Resources Recycling and Recovery (CalRecycle) has established the Used Oil Payment Program - 15 to make payments to qualifying jurisdictions for implementation of their used oil programs; and

WHEREAS, in furtherance of this authority CalRecycle is required to establish procedures governing the administration of the Used Oil Payment Program - 15; and

WHEREAS, the Used Oil Payment Program - 15 allows regional participation; and

WHEREAS, CalRecycle procedures for administering the Used Oil Payment Program - 15 require, among other things, a regional applicant's governing body to declare by resolution certain authorizations related to the administration of the Used Oil Payment Program - 15.

NOW THEREFORE, BE IT RESOLVED by the Executive Committee of the Western Riverside Council of Governments as follows:

The Western Riverside Council of Governments hereby authorizes the submittal of a regional application on behalf of itself and the Cities of Banning, Beaumont, Calimesa, Canyon Lake, Corona, Eastvale, Hemet, Jurupa Valley, Lake Elsinore, Menifee, Murrieta, Norco, Perris, Riverside, San Jacinto, Temecula and Wildomar to CalRecycle for a Local Government Used Oil Payment Program - 15.

BE IT FURTHER RESOLVED that the Executive Director, or his/her designee, is hereby authorized and empowered to execute in the name of the Western Riverside Council of Governments, all grant documents, including but not limited to, applications, agreements, annual reports including expenditure reports and amendments necessary to secure said payments to support the Used Oil Payment Program - 15; and

BE IT FURTHER RESOLVED that this authorization is effective until rescinded by the Executive Committee of the Western Riverside Council of Governments.

PASSED AND ADOPTED by the Executive Committee of the Western Riverside Council of Governments on May 6, 2024.

Chris Barajas, Chair
WRCOG Executive Committee

Dr. Kurt Wilson, Secretary
WRCOG Executive Committee

Approved as to form:

Steven DeBaun
WRCOG Legal Counsel

AYES: _____ NAYS: _____ ABSENT: _____ ABSTAIN: _____

Attachment

A Letter of Designation to Support
Regional Application – Used Oil
Payment Program - 15



Western Riverside Council of Governments

County of Riverside • City of Banning • City of Beaumont • City of Calimesa • City of Canyon Lake • City of Corona • City of Eastvale
City of Hemet • City of Jurupa Valley • City of Lake Elsinore • City of Menifee • City of Moreno Valley • City of Murrieta • City of Norco
City of Perris • City of Riverside • City of San Jacinto • City of Temecula • City of Wildomar • Eastern Municipal Water District
Western Municipal Water District • Riverside County Superintendent of Schools

May 6, 2024

Department of Resources Recycling and Recovery (CalRecycle)
P.O Box 4025
Sacramento, CA 95812-4025

Subject: Letter of Designation – Grant and Payment Programs

Dear CalRecycle:

Pursuant to Western Riverside Council of Governments' (WRCOG) Resolution Number 05-24 authorizing an application for the Used Oil Payment Program (OPP15), I am the designated Signature Authority for WRCOG. I am authorized by the Resolution to execute on behalf of WRCOG, all documents, including but not limited to, applications, agreements, amendments and requests for payment, necessary to secure funds and implement the approved project. The Resolution also authorizes me to delegate this authority. Accordingly, I hereby delegate this authority to Casey Dailey, Director of Energy & Environmental Programs.

This delegation is effective until rescinded by me or my successor.

Should you have any questions, please contact me at (951) 405-6701 or kwilson@wrcog.us.

Sincerely,

Kurt Wilson
WRCOG Executive Director



Western Riverside Council of Governments Joint Meeting of the WRCOG Executive Committee and Supporting Foundation

Staff Report

Subject: I-REN Monthly Activities Update

Contact: Casey Dailey, Director of Energy & Environmental Programs, cdailey@wrcog.us, (951) 405-6720

Date: May 6, 2024

Recommended Action(s):

1. Receive and file.
-

Summary:

The Inland Regional Energy Network (I-REN) is a coalition of three councils of government, the Western Riverside Council of Governments (WRCOG), the Coachella Valley Association of Governments (CVAG), and the San Bernardino Council of Governments (SBCOG), encompassing San Bernardino County, Riverside County, and all their respective jurisdictions within the region. These organizations have joined together to establish locally administered, designed, and delivered energy efficiency (EE) programs.

Purpose / WRCOG 2022-2027 Strategic Plan Goal:

The purpose of this item is to provide regular updates on I-REN activities. This effort aligns with WRCOG's 2022-2027 Strategic Plan Goal #6 (Develop and implement programs that support resilience for our region).

Discussion:

Background

In February 2021, I-REN applied for REN program administrator status to offer a portfolio of programs serving the Public Sector, Codes & Standards, and Workforce Education & Training (WE&T), with governance from WRCOG as the lead agency. In November 2021, I-REN was approved in Decision (D.) 21-11-013 Approval of Inland Regional Energy Network Energy Efficiency Business Plan, which funded I-REN to offer EE programs through program year 2027.

The bulk of 2022 was spent on laying the administrative groundwork by developing a Memorandum of Understanding between the COG partners, establishing a Governance and Operational structure,

developing a Program Agreement between the Investor Owned Utilities (IOU) of SoCal Gas and Southern California Edison, releasing Requests for Proposals (RFP) and selecting consultants, developing a website and branding for I-REN, establishing fiscal invoicing and tracking of I-REN's funds, establishing the I-REN Executive Committee, and much more.

Present Situation

After establishing a solid foundation for portfolio administration and governance in 2022, I-REN moved swiftly in 2023 to approve contracts, onboard consultants, and begin program development and outreach activities in earnest.

Stakeholder engagement, which played a vital role in shaping I-REN's business plan, continued to be a major focus of 2023 activities. I-REN hosted orientation workshops across its expansive territory to introduce the REN and gain insights from local and regional agency staff. Feedback from stakeholders informed I-REN's Organizational Strategic Planning process. Public and private sector building professionals provided survey responses with their needs and priorities for I-REN program designs. I-REN program teams attended and presented at events in partnership with a wide range of organizations, to strengthen existing relationships and foster new connections in the region.

Alongside stakeholder outreach efforts, crucial elements of I-REN's program portfolio were activated to provide quick benefits to the region. I-REN's Building Upgrade Concierge (BUC) was launched, and the public sector program team onboarded 28 agencies to begin receiving services. I-REN hosted its first C&S training in June 2023 and successfully delivered 12 training courses by the end of 2023. Under the WE&T Sector, 11 I-REN jurisdictions received I-REN Energy Fellows at their agencies to support capacity for EE and resiliency projects.

Public Sector (PS) Programs

I-REN's PS programs are guided by one primary goal: to build capacity and knowledge to enable local governments to effectively leverage EE services while demonstrating best practices to the greater community. To accomplish this goal, I-REN has outlined two primary strategies, aligned with its two program offerings for the PS programs. First, I-REN will develop a regional Building Upgrade Concierge (BUC) for local governments, special districts, and tribal nations and provide these jurisdictions with technical assistance and tools to inform and enable priority energy improvements. Second, I-REN will establish incentives and leverage financial mechanisms and technical assistance to assist local governments, special districts, and tribes in the implementation of EE projects in their public buildings.

I-REN will focus on two PS programs: 1) Technical Assistance and Strategic Energy Planning (TA) Program and 2) Normalized Metered Energy Consumption (NMEC) incentive program. The TA Program was developed with resource-constrained local jurisdictions, special districts, and tribes in the Inland Empire region in mind, where the EE landscape can be complicated to navigate. This program includes the development of a BUC service with resources and tools to guide member agencies through the EE process, from project development and planning, to financing, to project implementation and reporting. The BUC service is available to all member agencies now, through a software tool developed by one of I-REN's consultants, and provides Benchmarking options, energy consumption reports, financial savings reports, and data analysis and tracking reports, which will all be used in conjunction with Energy Resilience Roadmaps to assist member agencies in identifying priority of EE projects to focus on. Furthermore, this program provides a high level of personalized technical and financial assistance

support to complete energy efficiency projects. The program's tasks begin with collecting utility data and providing an Energy Resilience Roadmap to all member agencies to support strategic energy planning. Priority projects are identified to complete site visits and energy audits that identify energy and cost savings opportunities. The TA Program helps agencies secure funding and financing to implement the projects and supports through construction and project close-out.

The NMEC program (publicly known as Cash for Kilowatts) provides technical support such as eligibility screening and measurement and verification (M&V), and incentives for meter-based energy savings. The Program uses an NMEC approach to measure energy savings at the meter, incentivizing savings that have historically been excluded from EE programs or from technologies that are considered industry standard practice. The program places a special focus on whole building improvements to community-serving buildings by offering enhanced incentives for deep energy savings at critical facilities, cooling centers, and resilience centers. Combined with technical assistance and reinforcement of operations and management best practices, public agencies will experience maximized savings for their communities.

Table 1: Public Sector 2023 Achievements & 2024 Plans

Program	2023 Achievements	2024 Plans
Technical Assistance and Strategic Energy Planning Program	• 17 orientations conducted • 28 onboarding meetings with public agencies • 25 facilities benchmarked • 2 site visits performed • 2 audits in progress • 37 utility data requests initiated • 4 BUC portfolios created • 30 program collateral deliverables created • Gathered member agency feedback • Integrated feedback into project cap policy design to ensure equitable project resource distribution among member agencies	• Engage all member agencies in the region • Deliver first Initial Measure List with EE opportunities • Develop and deliver Energy Resilience Roadmap reports • Launch strategic marketing campaigns to spread awareness of project services • Begin DER audits (once Tier 3 Advice Letter approved by the CPUC)

Public Buildings Normalized Metered Energy Consumption (NMEC) Program – Cash for Kilowatts	• Gathered member agency feedback • Integrated feedback in program design • Developed tiered incentive structure to encourage deep energy savings projects at critical emergency operation, resilience, and cooling centers • Designed and developed tools and templates for effective program delivery	• Launch project development and process first incentive applications • Build robust project pipeline • Obtain utility data and track with BUC tool • Use BUC tool to provide reports and supporting data for evaluation
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Codes & Standards (C&S) Programs

The shared goal of I-REN's C&S Programs is to work closely with local building departments and the building industry to support, train, and enable long-term streamlining of energy code compliance. I-REN's programs will nurture the confidence, skills, and existing C&S knowledge of local building department staff, provide technical assistance to jurisdictions pursuing reach codes and local ordinances, and support building and construction industry actors to foster increased compliance. The 2023 achievements and 2024 plans of the two C&S programs are listed in the table below.

Table 2: Codes & Standards Sector 2023 Achievements & 2024 Plans

Program	2023 Achievements	2024 Plans
C&S Training and Education Program	• 77 public and private sector building professionals surveyed • 13 trainings held • 64 net individual attendees • 37 jurisdictions and 9 private sector building entities attended trainings • 99% satisfaction rating from participants	• 12 trainings • 2 C&S Forums • Increase number of participants, jurisdictions and private entities served through trainings • Offer a new training in Spanish
C&S Technical Support Program	• Identified key areas for greater support needed by jurisdictions • Supported Reach Code activities in Palm Springs • Launch of "Ask an Energy Code Question" on I-REN website	• Continue outreach to promote support services • Follow up with survey respondents to provide targeted support • Offer additional training around Senate Bill 379 compliance

Workforce Education & Training (WET) Programs

The goal of I-REN's WET cross-cutting sector activities is to ensure there is a trained workforce to support and realize EE savings goals across all market sectors. I-REN is committed to identifying the

most effective and accessible ways to increase the number of skilled EE workers, especially those within underserved, hard-to-reach (HTR), tribal, and disadvantaged communities (DAC). Senate Bill (SB) 350 stresses the importance of providing workforce development within underserved communities and I-REN is dedicated to targeting outreach towards those communities.

Table 3: Workforce Education & Training Sector 2023 Achievements & 2024 Plans

Program	2023 Achievements	2024 Plans
WE&T Training & Education Program	- Established partnerships with regional organizations: - Science and Technology Education Partnership Conference - Inland Empire/Desert Regional Consortium (IEDRC) - Participated in regional workforce events - Solicited proposals for workforce assessment provider	Conduct workforce assessment to guide I-REN staff on recommendations for future training programs related to energy job pathways
WE&T Workforce Development Program	11 I-REN Energy Fellows placed at member agencies 17 job fairs attended 200+ job seeker leads collected 50 potential partners identified 20 community partner meetings	- Energy Fellow activities: planned networking events and learning resource opportunities - March 2024 Energy & Infrastructure Showcase in partnership with IEDRC - California Climate and Energy Collaborative Forum

The second year of the I-REN Energy Fellowship is currently open. I-REN member agencies are available to apply for a I-REN Fellows ([24-25 - CivicSpark Partner Application \(formsite.com\)](#)).

There is no cost for I-REN member agencies to participate, I-REN will be covering the cost of the fellow.

Staff have participated in dozens of university job fairs, community career and resources fairs, and have spoken with hundreds of folks interested in I-REN Energy Fellowship. As of April 9, 2024, the application process is open ([24-25 - CivicSpark Fellow Application \(formsite.com\)](#)) Placement of fellows will occur in September for an 11-month paid fellowship.

I-REN Events/Activities Around the Region

In the coming reports, I-REN will include member agency updates and spotlights on successes from throughout the I-REN territory.

Table 4: Upcoming I-REN events/activities/sponsored events, etc.

Demystifying the Energy Code: How and Why to Comply	May 22, 2024, 9:00 AM - 12:00 PM	Online Register here!
Residential HVAC Load Calcs/Duct Design for Building Departments	May 30, 2024, 9:00 AM - 10:30 AM	Online Register here!
California Climate and Energy Collaborative Forum	June 25th – 26th, 2024	Palm Springs, CA https://eeccordinator.info/about-the-forum-2024/
Quality Insulation Installation	June 27, 2024, 9:00 AM - 10:30 AM	Online Register here!
Controlled Environment Horticulture (CEH) – 2022 Energy Code	July 25, 2024, 9:00 AM - 10:30 AM	Online Register here!

Other Activities: [Sign up for I-REN updates](#) and learn more about all the programs, services and resources I-REN has to offer by visiting www.iren.gov or emailing info@iren.gov.

Prior Action(s):

None.

Financial Summary:

All costs associated with I-REN program activities are included in WRCOG's adopted Fiscal Year 2023/2024 Agency Budget under I-REN Program (Fund 180) in the Energy & Environmental Department.

Attachment(s):

None.



Western Riverside Council of Governments Joint Meeting of the WRCOG Executive Committee and Supporting Foundation

Staff Report

Subject: Single Signature Authority Report
Contact: Julian Brambila, Analyst II, jbrambila@wrcog.us, (951) 405-6703
Date: May 6, 2024

Recommended Action(s):

1. Receive and file.

Summary:

This report offers insight into contracts facilitated by WRCOG under the jurisdiction of the Executive Director. WRCOG regularly engages in contractual agreements to support its operational functions. Contracts under \$100,000 are within the Single Signature Authority of the Executive Director. As these approvals typically happen outside of public meetings, this report serves to disseminate pertinent information. During the period from January to March 2024, two contracts were authorized by the Executive Director.

Purpose / WRCOG 2022-2027 Strategic Plan Goal:

The purpose of this item is to provide information regarding Administrative Services Department activities and to provide visibility into contracts entered by WRCOG using the authority of the Executive Director. This effort aligns with WRCOG's 2022-2027 Strategic Plan Goal #4 (Communicate proactively about the role and activities of the Council of Governments and its members).

Discussion:

Background

In the process of conducting regular business, WRCOG enters into a number of contracts on an ongoing basis. The process for approving those contracts varies, primarily by amount, and occasionally for other reasons. The Executive Committee has an uncapped level of approval authority (within the constraints of the budget approved by the General Assembly) and the Administration & Finance (A&F) Committee has a limit of \$200k.

Actions taken by either the Executive or A&F Committees are taken during public meetings and subject to public review and scrutiny. The Executive Director has Single Signature Authority for contracts up to

\$100,000, and because that process generally happens outside of a public meeting, this report is provided in order to share the information.

For the months of January 2024 to March 2024, two contracts were signed by the Executive Director. Additional information is provided below.

1. In February 2024, an Agreement was executed with 3 Point Consulting to provide strategic workshops and training for the I-REN team. The Agreement has a period of performance through June 30, 2024, at an amount not to exceed \$2,400.
2. In January 2024, an Agreement was executed with Mark Thomas & Company to provide technical assistance with transportation planning activities. The Agreement has a period of performance through June 30, 2025, at an amount not to exceed \$50,000.

Prior Action(s):

None.

Financial Summary:

This item is for informational purposes only; therefore, there is no fiscal impact. Each of the listed contracts corresponds with an existing budgeted item whose source, authority, and amount are consistent with the purpose and intent of the contract.

Attachment(s):

None.



Western Riverside Council of Governments Joint Meeting of the WRCOG Executive Committee and Supporting Foundation

Staff Report

Subject: Approval of Fiscal Year 2023/2024 Supporting Foundation Budget Amendment and Adoption of Fiscal Year 2024/2025 Supporting Foundation Budget

Contact: Louis Fernandez, Accounting Manager, lfernandez@wrcog.us, (951) 405-6744
Andrew Ruiz, Chief Financial Officer, aruiz@wrcog.us, (951) 405-6740
Bonnie Woodrome, Communications & External Affairs Manager, bwoodrome@wrcog.us, (951) 533-3726

Date: May 6, 2024

Recommended Action(s):

1. Approve the Fiscal Year 2023/2024 Supporting Foundation Budget Amendment.
 2. Adopt Resolution 01-24; A Resolution of the Board of Directors of the Western Riverside Council of Governments Supporting Foundation adopting the Fiscal Year 2024/2025 Supporting Foundation Budget.
-

Summary:

The Fiscal Year 2023/2024 Supporting Foundation Budget Amendment is presented for consideration and approval now that several key costs have been determined. Additionally, the Fiscal Year 2024/2025 Supporting Foundation Budget is also presented for approval and adoption.

Purpose / WRCOG 2022-2027 Strategic Plan Goal:

The purpose of this item is to present the Supporting Foundation Fiscal Year 2023/2024 budget amendment and the Fiscal Year 2024/2025 Supporting Foundation Budget for adoption by the Board of Directors. This item aligns with Strategic Plan Goal #3 (Ensure fiscal solvency and stability of the Western Riverside Council of Governments).

Discussion:

Background

In 2006, the Supporting Foundation was created to assist WRCOG with the implementation of its programs, primarily to provide a non-profit entity that could receive grant funds and donations which WRCOG could otherwise not accept. To that end, WRCOG established the Supporting Foundation as a 501(c)3 non-profit entity.

The Executive Committee serves as the Board of Directors for the Supporting Foundation. The Chair and Vice-Chair of the Executive Committee serve as the President and Vice-President of the Supporting Foundation, respectively. The Executive Director serves as the Secretary of the Supporting Foundation and the Chief Financial Officer (CFO) serves as the Treasurer.

Historically, the Supporting Foundation had not been directly involved in the General Assembly & Leadership Address events except in those rare instances in which a sponsor wished to use the Supporting Foundation to receive their donations. During Fiscal Year 2021/2022, WRCOG adopted resolutions to further leverage the Supporting Foundation to support the General Assembly event.

On May 2, 2022, the Supporting Foundation Board of Directors adopted a resolution to memorialize the scope of activities and expenditure authority related to the General Assembly event. This resolution adopted policies that explicitly allow the Supporting Foundation to support the General Assembly & Leadership Address and authorized the Secretary (Executive Director) and Treasurer (CFO) to 1) accept all funds, 2) transfer funds in any amount to WRCOG in order to support or reimburse any WRCOG activities, and 3) authorize expenditures in a manner consistent with the WRCOG spending policy, including the ability to authorize expenditures in amounts not to exceed \$100k.

Fiscal Year 2023/2024 Budget Amendment

The adopted Fiscal Year (FY) 2023/2024 Budget was primarily based on the known costs at the time for the 2023 General Assembly event. While this gave a reasonable basis for the overall budget amount, the individual costs for the General Assembly event are not known until certain key events occur.

Specifically, the event venue selection, speaker selection, and anticipated number of guests are the biggest variables in budgeting for the event. As the event venue, speaker, and anticipated number of guests have now been determined, staff are presenting an amendment to the FY 2023/2024 budget that more accurately depicts the costs for the event.

The revised budget for FY 2023/2024 anticipates \$331,500 in revenues (sponsorships, ticket sales and in-kind sponsorships) against \$329,750 in expenditures, which represents an increase of \$31,500 in revenues and \$56,512 in expenditures.

Fiscal Year 2024/2025 Budget

Historically the upcoming budget is based on the updated budget for the current year. Basing the upcoming year's budget with the current year's budget gives a reasonable basis for the overall budget amount. As previously noted, the individual costs for the General Assembly event are not known until certain key events occur. Of the three variables (speaker, venue, number of guests), the biggest variable has historically been the speaker fee. For planning purposes, the speaker fee is being budgeted at \$100,000, which represents an approximate average from prior years. The majority of other projected expenses are set to be the same as the 2023 General Assembly event, with minor increases and decreases in some line items. The projected revenue for FY 2024/2025 is assumed to be approximately 10% less than the current year based on the current assumptions. Once the Committee makes a speaker selection for the 2025 General Assembly event and other key events occur, a budget amendment will be brought forward to amend the FY 2024/2025 budget.

Prior Action(s):

None

Financial Summary:

The budget amendment for Fiscal Year 2023/2024 revises the budget to \$331,500 in revenues against \$329,750 in Expenditures.

The Fiscal Year 2024/2025 budget anticipates \$305,000 in revenues against \$303,250 in expenditures; however, a budget amendment will be brought forward once certain expenditures have been finalized.

As of June 30,2023 the Supporting Foundation had a fund balance of approximately \$77k. The total fund balance serves as a useful measure of the Foundation's net resources available for spending at the end of the fiscal year. The anticipated fund balance for FY 2024 is approximately \$79k.

Attachment(s):

[Attachment 1 - FY 2023/2024 Foundation Budget Amendment](#)

[Attachment 2 - Resolution 01-24 adopting FY 2024/2025 Foundation Budget](#)

Attachment

Fiscal Year 2023/2024
Supporting Foundation
Budget Amendment



**Western Riverside Council of Governments
Supporting Foundation
Fiscal Year 2023/2024 Budget Amendment**

	<u>Actual</u>	<u>FY 24 Budget</u>	<u>Variance</u>	<u>Amendment</u>	<u>Amended FY 24 Budget Amount</u>
Revenue:					
Sponsorships & Individual Tickets	\$ 184,247	\$ 250,000	\$ 65,753	\$ 25,000	\$ 275,000
Tribal Sponsorship - in-kind	-	50,000	50,000	-	50,000
Other Sponsorship - in-kind	6,500	-	(6,500)	6,500	6,500
Total Revenue	\$ 190,747	\$ 300,000	\$ 109,253	\$ 31,500	\$ 331,500
Expenditures:					
Event Support	\$ 73,385	\$ 116,738	\$ 43,353	58,012	\$ 174,750
Venue Expenses	19,270	105,000	85,730	-	105,000
Graphic Design Services	1,102	24,000	22,898	(1,500)	22,500
Pechanga Expenses	-	15,000	15,000	-	15,000
Printing Materials	-	12,500	12,500	-	12,500
Total Expenditures	\$ 93,757	\$ 273,238	\$ 179,481	\$ 56,512	\$ 329,750

Attachment

Resolution 01-24; Adopting the Fiscal
Year 2024/2025 Foundation Budget



3390 University Avenue, Ste 200
Riverside, CA 92501
(951) 405-6700
wrcog.us

WRCOG Supporting Foundation

County of Riverside • City of Banning • City of Beaumont • City of Calimesa •
City of Canyon Lake • City of Corona • City of Eastvale • City of Hemet • City of
Jurupa Valley • City of Lake Elsinore • City of Menifee • City of Moreno Valley •
City of Murrieta • City of Norco • City of Perris • City of Riverside • City of San
Jacinto • City of Temecula • City of Wildomar • Eastern Municipal Water District
Western Municipal Water District • Riverside County Superintendent of Schools

RESOLUTION NUMBER 01-24

A RESOLUTION OF THE BOARD OF DIRECTORS OF THE WESTERN RIVERSIDE COUNCIL OF GOVERNMENTS SUPPORTING FOUNDATION ADOPTING THE FISCAL YEAR 2024/2025 FOUNDATION BUDGET

WHEREAS, the Western Riverside Council of Governments Supporting Foundation (“Supporting Foundation”) was created to allow for the Western Riverside Council of Governments (“WRCOG”) to apply for and receive grant funding that supports the efforts of WRCOG’s various programs; and

WHEREAS, the Board of Directors has reviewed and approves the Supporting Foundation Fiscal Year 2024/2025 Budget.

NOW, THEREFORE, BE IT RESOLVED by the Board of Directors of the Western Riverside Council of Governments Supporting Foundation as follows:

Section 1. Recitals. The above recitals are incorporated herein by this reference.

Section 2. Final Budget. The Board of Directors hereby approves and adopts the Supporting Foundation Fiscal Year 2024/2025 Budget.

PASSED AND ADOPTED by the Board of Directors on May 6, 2024.

Chris Barajas, Chair
WRCOG Supporting Foundation

Dr. Kurt Wilson, Secretary
WRCOG Supporting Foundation

Approved as to form:

Steven DeBaun
WRCOG Legal Counsel

AYES: _____ NAYS: _____ ABSENT: _____ ABSTAIN: _____



**Western Riverside Council of Governments
Supporting Foundation
Fiscal Year 2024/2025 Budget**

	2025 Proposed Budget
Revenue:	
Sponsorships & Individual Tickets	\$ 255,000
Tribal Sponsorship - in-kind	50,000
<i>Total Revenue</i>	\$ 305,000
Expenditures:	
Event Support	\$ 142,750
Venue Expenses	110,000
Graphic Design Services	20,500
Pechanga Expenses	15,000
Printing Materials	15,000
<i>Total Expenditures</i>	\$ 303,250
Excess Revenue/(Expense)	\$ 1,750



Western Riverside Council of Governments Joint Meeting of the WRCOG Executive Committee and Supporting Foundation

Staff Report

Subject: Selection of WRCOG Executive Committee Chair, Vice-Chair, and 2nd Vice-Chair Positions for Fiscal Year 2024/2025

Contact: Dr. Kurt Wilson, Executive Director, kwilson@wrcog.us, (951) 405-6701

Date: May 6, 2024

Recommended Action(s):

1. Recommend that the General Assembly appoint Rita Rogers, Brenda Dennstedt, and Jacque Casillas to serve as WRCOG Chair, Vice-Chair, 2nd Vice-Chair, respectively, for Fiscal Year 2024/2025.

Summary:

Each year, the Executive Committee recommends to the General Assembly a list of individuals to be appointed as the WRCOG Chair, Vice-Chair, and 2nd Vice-Chair. The Administration & Finance Committee serves as the nominating Committee and forwards a list of nominated individuals to the Executive Committee for its consideration.

Purpose / WRCOG 2022-2027 Strategic Plan Goal:

The purpose of this item to provide information regarding leadership positions for Fiscal Year 2024/2025. This item supports WRCOG's 2022-2027 Strategic Plan Goal #4 (Communicate proactively about the role and activities of the Council of Governments).

Discussion:

Background

WRCOG's Bylaws (November 2021) indicate that there are three elected positions for WRCOG leadership: Chair, Vice-Chair, and 2nd Vice-Chair. As per the Bylaws, there are several requirements, including:

1. Must be a member of the Executive Committee (Article II, Section 2.A)
2. Must be from different members of the WRCOG member agencies (Article II, Section 2.B)

The Chair, Vice-Chair, and 2nd Vice-Chair all serve on an annual basis, with a term that runs through the

fiscal year (July 1 to June 30).

Present Situation

The Administration & Finance Committee acts as the nominating Committee for leadership positions on the Executive Committee. At its April 10, 2024, meeting, the Administration & Finance Committee recommended that the following persons be considered by the Executive Committee at its May 6, 2024, meeting:

Chair: Rita Rogers, City of Perris

Vice-Chair: Brenda Dennstedt, Western Water

2nd Vice-Chair: Jacque Casillas, City of Corona

Final approval of these positions will be conducted at the General Assembly meeting on June 20, 2024.

During the Administration & Finance Committee meeting, a question was raised regarding whether a representative of a Water District would be eligible to serve in a leadership position given their inability to vote on TUMF matters. Based on the Joint Powers Authority (JPA) and By-laws, there does not appear to be any limitation on a Water District representative serving in a leadership position. Language supporting this position is as follows:

- Section 2.4.1 of the JPA indicates that Water Districts shall be members of the WRCOG General Assembly.
- Section 2.4.2 states that Water Districts are also members of the WRCOG Executive Committee.
- Section 2.11 notes that the Executive Committee shall elect a Chair, a Vice-Chair, and a 2nd Vice-Chair. There is no language in this Section that specifically excludes Water District representatives from serving in a leadership position.

Further, Section 2.17 does specifically relate to how Water Districts relate to TUMF. As noted in this section:

The fee was established prior to the Water District's involvement with WRCOG and will fund transportation improvements for the benefit of the County of Riverside and the cities in Western Riverside County. As such, the Western Municipal Water District and the Eastern Municipal Water District shall not vote on any matter related to the administration of the TUMF Program or the expenditure of TUMF revenue.

There is no reference in this section that would preclude a Water District representative from presiding over the vote on a TUMF item or Chairing a meeting when TUMF items were on the agenda. Water District representatives currently do not participate in votes or discussions on TUMF matters which means there would be no deviation from current practice.

Section 2.A of the By-laws note that the General Assembly shall elect, by majority vote, the Chair, Vice-Chair, and 2nd Vice-Chair from members of the Executive Committee, provided they are nominated by either the General Assembly or the Executive Committee. That means that these positions can only be filled by current members of the Executive Committee. As noted above in the JPA, Water Districts are members of the Executive Committee.

Section 2.B states that the Chair, Vice-Chair, and 2nd Vice-Chair must represent different agencies.

Given the above, staff and General Counsel have determined that representatives of the Water Districts are eligible to serve in a leadership position for the Executive Committee. The only limitation on their service is that they are not allowed to vote on TUMF-related matters which specifically includes the administration of the TUMF Program or the expenditure of TUMF revenues.

Prior Action(s):

April 10, 2024: The Administration & Finance Committee nominated Rita Rogers, Brenda Dennstedt, and Jacque Casillas to serve as WRCOG Chair, Vice-Chair, and 2nd Vice-Chair, respectively, for Fiscal Year 2024/2025.

Financial Summary:

The action itself does not make any financial transactions; however, meeting stipends are allocated in the Fiscal Year 2024/2025 Agency Budget.

Attachment(s):

None.



Western Riverside Council of Governments Joint Meeting of the WRCOG Executive Committee and Supporting Foundation

Staff Report

Subject: TUMF Nexus Study - Release Draft for Review
Contact: Chris Gray, Deputy Executive Director, cgray@wrcog.us, (951) 405-6710
Date: May 6, 2024

Recommended Action(s):

1. Direct staff to release the draft TUMF Nexus Study update for a 30-day review / comment period.

Summary:

The TUMF Nexus Study draws a connection between the needs of the Program and the TUMF Program Fee Schedule. The Nexus Study identifies projects requiring mitigation from new development, determines anticipated project costs, and assesses fees to fund these projects. Analysis through transportation modeling work has determined a list of projects eligible for mitigation. Staff has completed a draft Nexus Study and is requesting a recommendation to the Executive Committee to release the draft for a 30-day review / comment period.

Purpose / WRCOG 2022-2027 Strategic Plan Goal:

The purpose of this item is to provide an update on the draft TUMF Nexus Study. This effort aligns with WRCOG's 2022-2027 Strategic Plan Goal #5 (Develop projects and programs that improve infrastructure and sustainable development in our subregion).

Discussion:

Background

At its October 4, 2021, meeting, the Executive Committee gave direction for staff to begin work on a Nexus Study update. The Nexus Study draws a connection between the needs of the Program and the TUMF Program Fee Schedule. The Nexus Study identifies projects requiring mitigation from new development, determines what the cost of those projects will be, and which fees need to be assessed to fund these projects. Nexus Study updates have occurred on a regular basis with updates done in 2005, 2009, 2011, and 2017.

The key reasons for a Nexus Study update include the following:

- It is considered a best practice to update on a regular basis
- Underlying growth forecasts have changed since the last update
- Travel behavior has changed, particularly viewed in light of COVID-19
- The project list has changed, with past projects completed and new projects identified
- Opportunity to add new project types, such as Intelligent Transportation System (ITS) infrastructure

Present Situation

Work has been completed on reviewing project cost data, local jurisdiction comments, and previously obligated funding. With this data, WRCOG has compiled a draft Nexus Study (Attachment 1). In order to be approved, a 30-day review / comment period is required. This period will provide WRCOG member agencies and the public an opportunity to make any comment(s) before a final draft is presented to the Executive Committee.

The draft Nexus Study satisfies the needs of the Mitigation Fee Act (AB 1600) which governs imposing development impact fees in California. The draft Nexus Study confirms the following, as per AB 1600 rules:

1. Establish a nexus or reasonable relationship between the development impact fee's use and the type of project for which the fee is required.
2. The fee must not exceed the project's proportional "fair share" of the proposed improvement and cannot be used to correct current problems or to make improvements for existing development.

This draft document describes the various assumptions, data inputs and analysis leading to the determination of each major variable in the TUMF calculation, and ultimately leads to the determination of the TUMF Schedule of Fees and the maximum "fair share" fee for each of the various use types defined in the TUMF Program. These two primary outputs are included in the draft document and represent the two main components of the Nexus Study.

The first output of the draft Nexus Study is the TUMF Network Cost Estimates (Table 4.4 of Attachment 1). This list includes all the infrastructure projects included in the TUMF Program. These infrastructures include road widening, interchanges, bridges, grade separations, transit projects, and ITS projects. Each project in this list is on the TUMF Regional System of Highways and Arterials, and will have potential TUMF funding. Eligible projects would include those that, due to congestion, have a need to be mitigated. This mitigation could be adding a lane to a road, widening a bridge, or improving an interchange. The Nexus Study also determines how much of the mitigation need is being caused by traffic from new development. From these calculations a total eligible funding figure is presented on each project, also known as a 'maximum TUMF share.' This figure represents the maximum amount of TUMF funding that the local agency can request to be allocated towards one of its projects.

The second key component of the Nexus Study is the TUMF Fee Schedule. The total cost to mitigate the TUMF Network is divided among the different types of developments in proportion to their expected traffic impacts. TUMF groups the various land use categories to simplify the administration of the Program. The main uses are Single-family Residential, Multi-family Residential, Service, Retail, and Industrial. The fee schedule represents the maximum fee permissible under California law for the purposes of the TUMF Program.

The Executive Committee has the option to adopt lower fees; however, in doing so, each use category subject to a lower fee would not be contributing a fair share of the cost of their impacts. This would in turn require project funding to come from another source to close the funding gap created. The fee calculation for residential and non-residential uses is located in Table 7.1 of Attachment 1.

WRCOG Staff will also be providing an update regarding the recent Supreme Court decision in the case of *Sheetz v. County of El Dorado* in the context of the Nexus Study update.

Prior Action(s):

April 18, 2024: The Technical Advisory Committee received and filed.

April 11, 2024: The Public Works Committee recommended that the Executive Committee release the draft Nexus Study for a 30-day review and comment period.

April 11, 2024: The Planning Directors Committee's recommended that the Executive Committee release the draft Study for a 30-day review and comment period.

April 10, 2024: The Administration & Finance Committee recommended that the Executive Committee release the draft Study for a 30-day review and comment period.

February 15, 2024: The Technical Advisory Committee received and filed.

February 14, 2024: The Administration & Finance Committee received and filed.

February 8, 2024: The Public Works Committee received and filed.

December 14, 2023: The Public Works Committee received and filed.

October 12, 2023: The Public Works Committee received and filed.

August 10, 2023: The Public Works Committee received and filed.

June 8, 2023: The Public Works Committee received and filed.

April 13, 2023: The Public Works Committee approved the updated TUMF Nexus Study Roadway Network.

July 11, 2022: The Executive Committee received and filed.

March 17, 2022: The Technical Advisory Committee received and filed.

March 10, 2022: The Public Works Committee received and filed.

October 4, 2021: The Executive Committee gave direction to 1) begin work on a TUMF Nexus Study update; 2) update the TUMF Administrative Plan to expand the TUMF-eligible project list to include Intelligent Transportation Systems projects; 3) work with the Riverside County Transportation

Commission and Riverside Transit Agency to evaluate options to mitigate VMT impacts from new development outside of the TUMF Nexus Study update; and 4) begin work on an update of the Analysis of Development Impact Fees in Western Riverside County.

Financial Summary:

Funding for TUMF activities is included in the Fiscal Year 2023/2024 budget under the TUMF Program (1148) in the General Fund (110). 4% of all TUMF collections are allocated for administrative purposes. If the Nexus study is approved, the fiscal impact would likely occur in Fiscal Year 2024/2025, which would increase and decrease revenues across the various land use types. At that time, a budget amendment will be brought forward to amend the budget accordingly.

Attachment(s):

[Attachment 1 - Draft TUMF Nexus Study 2024](#)



TRANSPORTATION UNIFORM MITIGATION FEE NEXUS STUDY 2024 UPDATE

FINAL REPORT

Prepared for the Western Riverside Council of Governments

In Cooperation with

The City of Banning
The City of Beaumont
The City of Calimesa
The City of Canyon Lake
The City of Corona
The City of Eastvale
The City of Hemet
The City of Jurupa Valley
The City of Lake Elsinore
The City of Menifee
The City of Moreno Valley
The City of Murrieta
The City of Norco
The City of Perris
The City of Riverside
The City of San Jacinto
The City of Temecula
The City of Wildomar
The County of Riverside
Eastern Municipal Water District
March Joint Powers Authority
Morongo Band of Mission Indians
Riverside County Superintendent of Schools
Riverside Transit Agency
Western Municipal Water District

DRAFT

Prepared by GHD

DRAFT March 7, 2024



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1.0 INTRODUCTION AND PURPOSE OF THE NEXUS STUDY

1.1 Background

Western Riverside County includes 18 incorporated cities and the unincorporated county covering an area of approximately 2,100 square miles. Through the mid 2000's, this portion of Riverside County was growing at a pace exceeding the capacity of existing financial resources to meet increasing demand for transportation infrastructure. Although the economic recession of the late 2000's, and the associated crises in the mortgage and housing industries, slowed this rate of growth, the regional economy has recovered and the projected rate of development in Western Riverside County remains high. Similarly, the impact of the COVID-19 pandemic on travel demand in the region has also passed, with travel demands, especially for the highway network, surpassing pre-pandemic levels.

Continued high growth in households and jobs in Western Riverside County could significantly increase congestion and degrade mobility if substantial investments are not made in transportation infrastructure. This challenge is especially critical for arterial roadways of regional significance, since traditional sources of transportation funding (such as the gasoline tax and local general funds) will not be nearly sufficient to fund the needed improvements. Development exactions only provide improvements near the development site, and the broad-based county-level funding sources (i.e., Riverside County's half-cent sales tax known as Measure A) designate only a small portion of their revenues for arterial roadway improvements.

In anticipation of the continued future growth projected in Riverside County, several county-wide planning processes were initiated in 1999. These planning processes include the Riverside County General Plan Update, the Community Environmental Transportation Acceptability Process (CETAP) and the Multi-Species Habitat Conservation Plan (MSHCP). Related to these planning processes is the need to fund the mitigation of the cumulative regional transportation impacts of future new development.

Regional arterial highways in Western Riverside County are forecast to carry significant traffic volumes by 2045. While some localized fee programs exist to mitigate the local impacts of new development on the transportation system in specific areas, and while these programs are effective locally, they are insufficient in their ability to meet the regional demand for transportation infrastructure. Former Riverside County Supervisor Buster recognized the need to establish a comprehensive funding source to mitigate the cumulative regional transportation impacts of new development on regional arterial highways. The need to establish a comprehensive funding source for arterial highway improvements has evolved into the development of the Transportation Uniform Mitigation Fee (TUMF) for Western Riverside County.

In February 1999, the cities of Temecula, Murrieta and Lake Elsinore, the Western Riverside Council of Governments (WRCOG), the Riverside County Transportation Commission (RCTC) and the Building Industry Association (BIA) met to discuss the

concept of a TUMF. The intent of this effort was to have the southwest area of Western Riverside County act as a demonstration for the development of policies and a process for a regional TUMF Program before applying the concept countywide. From February 1999 to September 2000, the Southwest Area Transportation Infrastructure System Funding Year 2020 (SATISFY 2020) Program progressed with policy development, the identification of transportation improvements, traffic modeling, cost estimates, fee scenarios and a draft Implementation Agreement.

In May 2000, Riverside County Supervisor Tavaglione initiated discussions in the northwest area of Western Riverside County to determine the level of interest in developing a TUMF for that area of the county. Interest in the development of a northwest area fee program was high. In August 2000, the WRCOG Executive Committee took action to build upon the work completed in the southwest area for the SATISFY 2020 program and to develop a single consolidated mitigation fee program for all of Western Riverside County. This action was predicated on the desire to establish a single uniform mitigation fee program to mitigate the cumulative regional impacts of new development on the regional arterial highway system, rather than multiple discrete and disparate fee programs with varying policies, fees and improvement projects. A TUMF Policy Committee comprising regional elected officials was formed to recommend and set policies for staff to develop the TUMF Program and provide overall guidance to all other staff committees.

While the TUMF cannot fund all necessary transportation system improvements, it is intended to address a current transportation funding shortfall by establishing a new revenue source that ensures future new development will contribute toward addressing its indirect cumulative traffic impacts on regional transportation infrastructure. Funding accumulated through the TUMF Program will be used to construct transportation improvements such as new arterial highway lanes, reconfigured freeway interchanges, railroad grade separations and new regional express bus services that will be needed to accommodate future travel demand in Western Riverside County. By levying a fee on new developments in the region, local agencies will be establishing a mechanism by which developers and in turn new county residents and employees will effectively contribute their “fair share” toward sustaining the regional transportation system.

This TUMF Nexus Study is intended to satisfy the requirements of California Government Code Chapter 5 Section 66000-66008 Fees for Development Projects (also known as California Assembly Bill 1600 (AB 1600) or the Mitigation Fee Act), which governs imposing development impact fees in California. The Mitigation Fee Act requires that all local agencies in California, including cities, counties, and special districts follow two basic rules when instituting impact fees. These rules are as follows:

- 1) Establish a nexus or reasonable relationship between the development impact fee's use and the type of project for which the fee is required.
- 2) The fee must not exceed the project's proportional “fair share” of the proposed improvement and cannot be used to correct current problems or to make improvements for existing development.

1.2 TUMF Nexus Study History

The TUMF Program is implemented through the auspices of WRCOG. As the council of governments for Western Riverside County, WRCOG provides a forum for representatives from 18 cities, the Riverside County Board of Supervisors, the Eastern and Western Municipal Water Districts, the Riverside County Superintendent of Schools, the March Joint Powers Authority, the Riverside Transit Agency and the Morongo Band of Mission Indians to collaborate on issues that affect the entire subregion, such as air quality, solid waste, transportation and the environment. WRCOG strives to "respect local control, provide regional perspective, and make a difference" to elevate the quality of life throughout the subregion. A current list of the standing WRCOG TUMF related committees and committee membership is included in **Appendix A**.

The initial WRCOG TUMF Nexus Study was completed in October 2002 and adopted by the WRCOG Executive Committee in November 2002. Its purpose was to establish the nexus or reasonable relationship between new land development projects in Western Riverside County and the proposed development impact fee that would be used to improve regional transportation facilities. It also identified the proportional "fair share" of the improvement cost attributable to new development.

Consistent with the provisions of the Mitigation Fee Act, the WRCOG Executive Committee has established that the TUMF Nexus Study will be subject of a comprehensive review of the underlying program assumptions at least every five years to confirm the Nexus. Acknowledging the unprecedented and unique nature of the TUMF Program, the Executive Committee determined that the first comprehensive review of the Program should be initiated within two years of initial adoption of the Program primarily to validate the findings and recommendations of the study and to correct any program oversights. The results of the first review of the Program were documented in the TUMF Nexus Study 2005 Update adopted by the WRCOG Executive Committee on February 6, 2006. A second comprehensive review of the TUMF Program was conducted in 2008 and 2009 in part to address the impacts of the economic recession on the rate of development within the region and on transportation project costs. The findings of the 2009 review of the program were adopted by the WRCOG Executive Committee on October 5, 2009.

A third comprehensive review of the TUMF Program was conducted in 2014 and 2015 leading to a Draft Nexus Study document being distributed for review in August 2015. The WRCOG Executive Committee subsequently considered comments related to the Draft Nexus Study 2015 Update at the meeting held on September 14, 2015, where it was resolved to "delay finalizing the Nexus Study for the TUMF Program Update until the 2016 Southern California Association of Governments' 2016 Regional Transportation Plan / Sustainable Communities Strategy growth forecast is available for inclusion in the Nexus Study". The Southern California Association of Governments (SCAG) adopted the 2016-2040 Regional Transportation Plan/ Sustainable Communities Strategy (2016 RTP/SCS) on April 7, 2016, enabling WRCOG staff to proceed with finalizing the update of the TUMF Nexus Study. The WRCOG TUMF Nexus Study 2016 Update Report was ultimately adopted by the WRCOG Executive Committee on July 10, 2017.

On September 3, 2020, SCAG adopted Connect SoCal; The 2020-2045 Regional Transportation Plan/Sustainable Communities Strategy of the Southern California Association of Governments (2020 RTP/SCS). As stated in the plan document “Connect SoCal embodies a collective vision for the region’s future, through the horizon year of 2045. It is developed with input from a wide range of constituents and stakeholders within the Counties of Imperial, Los Angeles, Orange, Riverside, San Bernardino and Ventura, including public agencies, community organizations, elected officials, tribal governments, the business community and the general public. Connect SoCal is an important planning document for the region, allowing public agencies who implement transportation projects to do so in a coordinated manner, while qualifying for federal and state funding.”

The adoption of the 2020 RTP/SCS confirmed new growth forecasts for the region that were used as the basis to develop the Connect SoCal plan. These forecasts also provide a foundational element for updating the TUMF program and the associated nexus determination prompting WRCOG to initiate the current program update. The 2020 RTP/SCS growth forecasts are used directly in the fee calculation as the basis for determining the anticipated growth in households and employment in the region through the program horizon year of 2045. These forecasts are also integrated into the Riverside County Transportation Analysis Model (RivCoM) used to forecast the cumulative regional traffic impacts of new development on the arterial highway network in Western Riverside County.

Completed in 2021 to succeed the Riverside County Traffic Analysis Model (RIVTAM), RivCoM provides a valuable tool for supporting a variety of transportation planning activities in Riverside County, including the update of the TUMF Nexus Study. RivCoM was developed under the leadership of WRCOG in conjunction with regional partners with the intent to provide jurisdictions in Riverside County with a traffic forecasting tool that, while consistent with the SCAG regional travel demand model, provides a more appropriate level of detail to support transportation planning at the County or City level.

RivCoM is a critical tool for quantifying the cumulative regional traffic impacts of new development as part of the TUMF Nexus Study Update. Utilizing the 2020 RTP/SCS growth forecasts, RivCoM is used to quantify changes in travel demand and traffic conditions on the regional highway network, with a specific focus on the TUMF Network. RivCoM outputs are used to analyze project eligibility and quantify the fair share of traffic growth that is attributable to new development as inputs to determining the fee. The adoption of the Connect SoCal plan and the availability of RivCoM to serve as a critical tool for quantifying network impacts for the TUMF Nexus Study Update were key factors driving the schedule for this update of the fee.

To ensure new development continues to contribute a fair share of the cost to mitigate its cumulative regional transportation impacts in the period between the comprehensive review of program assumptions completed at least every five years, the WRCOG Executive Committee has also established that the TUMF Schedule of Fees will be reviewed annually, and adjusted, as needed, on July 1st to reflect current costs. The revised schedule of fees will typically be recalculated in February of each year based

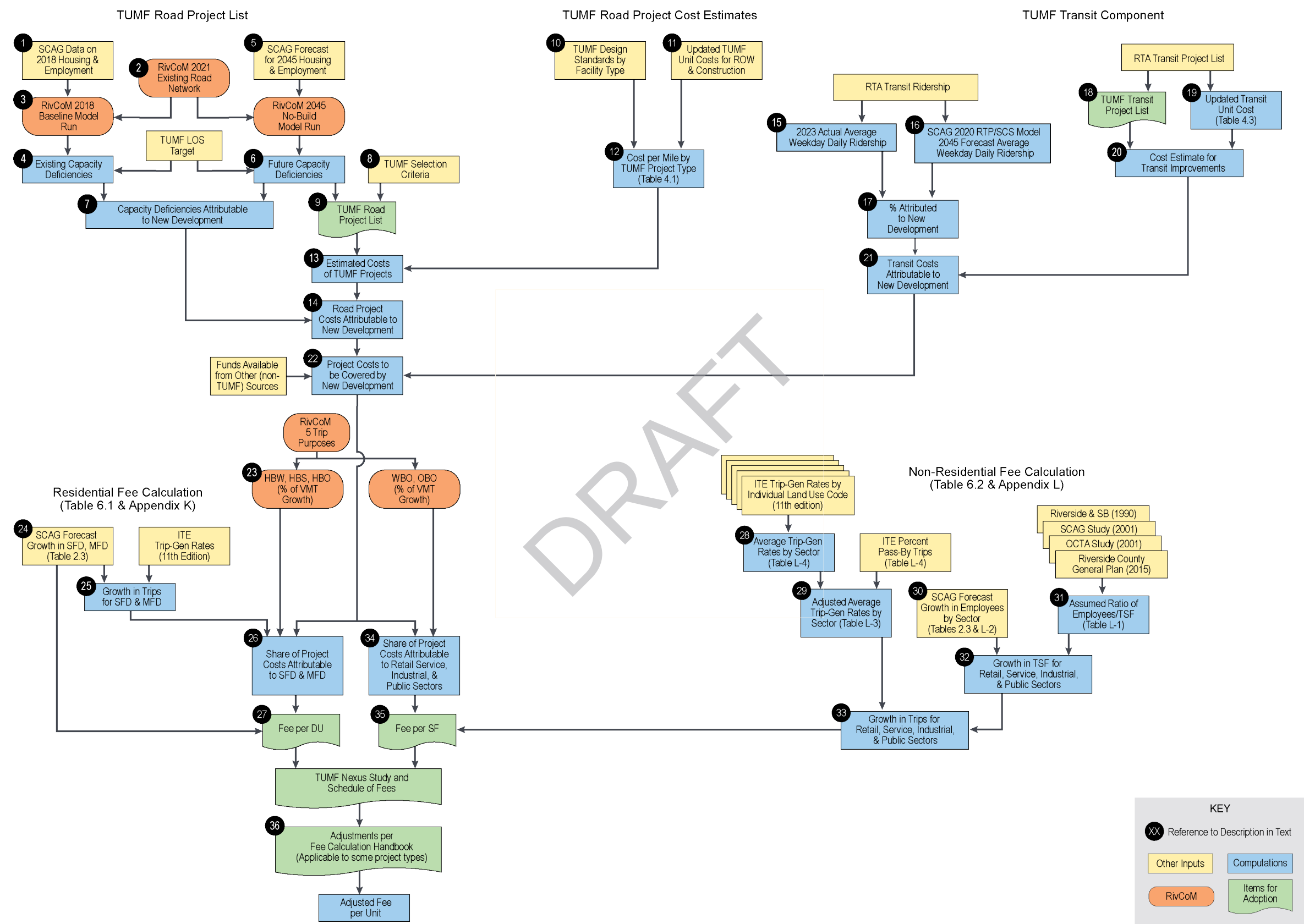
on the percentage increase or decrease in the Engineering News Record (ENR) Construction Cost Index (CCI) for the twelve (12) month period from January of the prior year to January of the current year, and the percentage increase or decrease in the National Association of Realtors (NAR) Median Sales Price of Existing Single Family Homes in the Riverside/San Bernardino Metropolitan Statistical Area for the twelve (12) month period from the 3rd Quarter of the second year prior to the 3rd Quarter of the prior year (to coincide with the publication of the most recently updated index). If approved by the Executive Committee, the resultant percentage change for each of the indices will be applied to the unit cost assumptions for roadway and bus transit costs, and land acquisition costs, respectively, to reflect the combined effects of changes in eligible project costs on the resultant per unit fee for each defined land use category. The most recent annual cost adjustment to the TUMF Schedule of Fees was adopted by the WRCOG Executive Committee on July 12, 2021.

1.3 TUMF Nexus Study Process

In coordination with WRCOG, city and county representatives and other interested parties have reviewed the underlying assumptions of the Nexus Study as part of this comprehensive program review. In particular, the most recent socioeconomic forecasts developed by SCAG as the basis for the 2020 RTP/SCS were incorporated. This use of the most recent SCAG forecasts resulted in a shift of the program base year from 2012 to 2018, as well as a shift in the program horizon year from 2040 to 2045. Furthermore, the TUMF Network was re-examined in detail based on travel demand forecasts derived from the most recent version of the Riverside County Model (RivCoM) to more accurately reflect future project needs to address the cumulative regional impacts of new development in Western Riverside County as well as eliminating those projects having been completed prior to the commencement of the Nexus review in 2021.

The subsequent chapters of this Nexus Study document describe the various assumptions, data inputs and analysis leading to the determination of each major variable in the TUMF calculation, and ultimately leading to the determination of the TUMF Schedule of Fees that indicates the maximum "fair share" fee for each of the various use types defined in the TUMF program. The overall process for establishing the TUMF nexus is summarized in this section, including the flow chart in **Figure 1.1** that illustrates the various technical steps in this fee calculation process. Each technical step that was followed to determine the TUMF Schedule of Fees and establish the program nexus is summarized below, with the numbers denoted on the flow chart correlating to the steps described. The flow chart also incorporates color coding of the steps to indicate those steps that involved the application of RivTAM, steps that utilized other input data, steps that are computations of various inputs, and steps that required specific actions of the various WRCOG committees to confirm major variables. Where appropriate, the flow chart also includes specific cross references to the sections or tables included in this Nexus Study document that correlate to the particular step.

Figure 1.1 - Flowchart of Key Steps in the TUMF Nexus Study Process



1.3.1. Establish the TUMF Network Project List

The roadway network in Western Riverside County must be evaluated to determine how new development activity will impact the performance of the network, and how the resultant traffic impacts can be mitigated by completing various roadway improvements. The following steps integrate the latest SCAG socio-economic forecasts into RivCoM as the basis for determining future roadway deficiencies and identifying the list of eligible improvements to address these future deficiencies. The rational and methodology for accomplishing these steps is further explained in **Chapters 2 and 3** of this report, with the resultant TUMF Network described in **Chapter 4**.

- 1) The SCAG 2020 RTP/SCS was developed using housing and employment data for 2018 as its base year. This adopted dataset was integrated into RivCoM providing a critical analytic tool to support the Nexus Study Update.
- 2) The RivCoM model¹ has datasets available that represent the capacity of the different facilities in the road network for several different study years. For this nexus update, the RivCoM 2018 base network that was developed following the adoption of the SCAG 2020 RTP was selected as the one most closely resembling current conditions. This network was subsequently reviewed and updated, including a detailed review by WRCOG staff and participating jurisdictions, to identify projects that were completed on the arterial network in the period between 2016 and December 2021. The arterial network was then recoded to reflect the changes to the TUMF Network to create a 2021 Existing Network as the base network for analysis. A second version of the base network was also developed adding only those facilities that had been identified on the 2016 TUMF network that did not currently exist and therefore were not represented by a link(s) in RivCoM. The Supplemental 2021 Existing Network was utilized as the basis for assessing only those projects that did not currently exist on the TUMF Network.
- 3) RivCoM was run using the 2018 socio-economic data (SED) and the 2021 Existing Networks to produce the baseline volumes on the roads in the TUMF Network.
- 4) The baseline volume-to-capacity (V/C) ratio was then determined. The target LOS for TUMF facilities is "D", meaning that facilities with LOS "E" or "F", i.e. those with a V/C ratio of 0.9 or higher, are deemed to have inadequate capacity. The result of this step is a list of roads that have existing capacity deficiencies.

¹ The macro-level traffic forecasting was conducted using the Riverside County Transportation Analysis Model (RivCoM). RivCoM is consistent of SCAG's six-county model with additional detail (traffic analysis zones and local roads) added within Riverside County. It was developed for use in traffic studies in Riverside County as a replacement for the Riverside County Transportation and Analysis Model (RivTAM) integrating an updated modeling platform to improve run time and reliability, as well as a more focused model area, more detailed network and zone structure, and post processors to satisfy more recent legislative requirements. RivCoM has both the geographic scope needed to analyze all TUMF facilities and conformity with regional planning assumptions. There is a memorandum of understanding among the jurisdictions of Riverside County that encourages the use of the RivCoM model for use in regional traffic studies.

- 5) The SCAG 2020 RTP/SCS was developed using housing and employment data for 2045 as its forecast horizon year. This adopted dataset was also used as the future base year for the TUMF update calculation.
- 6) RivTAM was run using the 2021 Existing Networks with the land use assumptions for 2045. These “Future No-Build” scenarios was used to determine where deficiencies would occur in the roadway system if development occurred as expected but no roadway improvements were implemented.
- 7) Comparing the existing capacity deficiencies with the future deficiencies showed where new deficiencies would occur that are entirely attributable to growth in households and employment. Comparing the existing and future traffic volume to capacity ratio on the roads that are currently deficient shows the portion of the future deficiency that is attributable to growth.
- 8) It is generally acknowledged that the TUMF program cannot and should not attempt to fund every roadway improvement needed in Western Riverside County. WRCOG has adopted a set of selection criteria that was used to choose which roadway improvements would be eligible for TUMF funding.
- 9) The selection criteria were applied to the forecast deficiencies to identify projects for the TUMF Project List. The project list was subsequently reviewed to confirm the eligibility of proposed projects, including projects previously included in the TUMF program, as well as additional projects requested for inclusion as part of the current update. The project list was then subsequently updated to reflect those projects considered eligible for TUMF funding as part of the 2024 Nexus Study Update.

1.3.2. Determine the TUMF Network Project Costs

The estimated costs of proposed improvements on the TUMF Network are calculated based on the prices of construction materials, labor and land values for the various eligible project types included as part of the TUMF program. The approach and outcomes of the following steps is described in **Chapter 4** of this report.

- 10) The TUMF program has design standards covering the road project components that are eligible for TUMF funding. This ensures that projects in jurisdictions with different design standards are treated equally².
- 11) Current cost values for labor and materials such as cement, asphalt, reinforcing steel, etc., as derived from Caltrans cost database, RCTC and other sources, were tabulated and updated to December 2023. Additionally, the ROW cost components per square foot for various land use types were also updated based on current property valuations in Riverside County as researched by Overland, Pacific and Cutler.

² A jurisdiction may choose to design to a higher standard, but if it does so, TUMF will only fund up to the equivalent of what costs would have been had the TUMF design standards been followed.

- 12) The cost values for the contributing labor, materials and land components were applied to estimated quantities of these components for the various roadway project types that are eligible under TUMF to generate aggregate unit cost values for each project type (road costs per lane-mile, typical costs per arterial-freeway interchange, bridge costs per linear foot, etc.).
- 13) The unit costs from the previous step were then applied to the project list to estimate the costs of the improvements on the TUMF project list.
- 14) The percentage of each project that was attributable to new development was then applied to the costs of TUMF road projects to find the total road project cost that is attributable to new development.

1.3.3. Determine the TUMF Transit Component

A portion of the TUMF funding is made available for transit services that provide an alternative to car travel for medium-to-long distance intra-regional trips. The eligible transit projects and their associated costs are determined using the following steps, with additional explanation provided in **Chapter 4** of this report.

- 15) Actual average weekday daily ridership for Riverside Transit Agency (RTA) transit bus services was tabulated for 2023.
- 16) Forecast average weekday daily ridership for RTA bus transit services was retrieved from the SCAG 2020 RTP/SCS Model for horizon year 2045.
- 17) The growth in ridership between 2023 and 2045 was compared to determine the portion of 2045 average weekday daily ridership that is attributable to existing passengers and the portion attributable to new growth.
- 18) A proposed transit project list was provided by RTA staff and was reviewed to confirm the validity of the project list to establish a final recommended transit project list to be included as part of the program. The result was the TUMF Transit Project List.
- 19) RTA provided information on current costs for the listed transit infrastructure.
- 20) The cost information was then used to determine the cost of the items on the TUMF Transit Project List.
- 21) The percent attribution from Step 17 was applied to the project cost estimates from the previous step to determine the cost of transit improvements that are attributable to new development.
- 22) The costs for road and transit projects that are attributable to new development are then combined along with information on other (non-TUMF) funds to determine the total cost for TUMF projects that is to be covered by new development through the imposition of the fees. The available alternate funding sources were reviewed as part of the Nexus update, specifically including the completion of a detailed review of available federal, state and local funding sources administered by RCTC.

1.3.4. Computing the Fee for Residential Developments

Having determined the total project costs to be covered by new development under the TUMF program, it is necessary to divide these costs among different types of developments roughly in proportion to their expected traffic impacts. The following steps describes the process for determining the proportion attributable to new residential development. The approach for accomplishing these steps along with the findings of this analysis are described in detail in **Chapter 5** and **Chapter 6** of this report.

- 23) California legislation encourages the use of vehicle miles of travel (VMT) as the primary indicator of traffic impacts because it combines the number of vehicle trips and the average length of those trips to reflect the proportional impact to the roadway network. As a result, the methodology for determining the relative distribution of traffic impacts between residential and non-residential uses for the purposes of TUMF utilizes a VMT based approach. The RivCoM 2021 Existing Network and 2045 No-Build model runs were examined to determine the VMT of various trip types that would take place in Western Riverside County (excluding through trips). The results were compared to determine the growth in VMT for each trip type. Per WRCOG policy (based on National Cooperative Highway Research Program (NCHRP) recommended practice) trips originating in or destined for a home are attributed to residential development while trips where neither the origin nor the destination are a home are attributed to non-residential development.
- 24) The SCAG 2020 RTP/SCS socio-economic forecasts were used to estimate the number of single-family and multi-family dwelling units that will be developed during the 2018 to 2045 period.
- 25) The Institute of Transportation Engineers' (ITE's) trip generation rates, which come from surveys of existing sites for various development types, were then used to estimate the daily number of trips that will be generated by future single- and multi-family developments that will occur in the region from 2018 to 2045.
- 26) The cost to be covered by residential development was divided into the portion attributable to new single-family dwellings and portion attributable to new multi-family development to calculate the cost share for each use.
- 27) The cost share for single-family dwellings and multi-family dwellings was divided by the number of dwellings of each type to determine the fee level required from each new dwelling unit to cover their fair share of the cost to mitigate the impacts of new developments.

1.3.5. Computing the Fee for Non-Residential Developments

A process similar to that used for residential units was used to determine the fee level for non-residential development. However, the determination of fees for non-residential development involves additional steps due to the additional complexity of accounting for a greater variety of development types within each use category. **Chapter 5** and **Chapter 6** of this report provide additional explanation regarding the methodology for accomplishing these steps along with the results of this analysis.

- 28) Like most impact fee programs, TUMF groups similar development projects together into general use categories to simplify the administration of the program. TUMF groups the various land use categories found in ITE's Trip Generation Manual into four non-residential categories (industrial, retail, service, and government/public sector) based on the North American Industry Classification System (NAICS), which is also used by the U.S. Census Bureau and SCAG for demographic classifications, and is the basis for such classifications in the SCAG Regional Travel Demand Model as well as and the RivCoM model. The ITE trip generation rates for all uses were reviewed for accuracy updated to reflect the most current ITE published rates. The median value for the trip-generation rates for all uses within each category was used in the nexus study to represent the trip-generation characteristics for the category as a whole.
- 29) The trip-generation rates of retail uses and service uses were adjusted to take into account the share of pass-by trips these uses generate. Pass by trip rates for various retail and service uses were derived from the ITE Trip Generation Manual to determine the median value of all uses as the basis for the adjustment. The ITE pass by trip rates for all uses were reviewed for accuracy and updated to reflect the most current ITE published rates.
- 30) The SCAG 2020 RTP/SCS socio economic forecasts included non-residential employment for 2018 and 2045. These forecasts were used to estimate the growth in employment in each of the four non-residential uses.
- 31) The SCAG employment forecasts are denominated in jobs while development applications are typically denominated in square feet of floorspace. The ratio of floorspace per employee was determined as a median value derived from four studies, including a comprehensive study San Bernardino and Riverside Counties conducted in 1990, an OCTA study conducted in 2001, a SCAG study (including a specific focus on Riverside County) conducted in 2001, and the Riverside County General Plan adopted in 2015.
- 32) The forecast growth in employees was multiplied by the floorspace per employee to produce a forecast of the floorspace that will be developed for each of the four non-residential use types.
- 33) The trip-generation rate for each of the four uses was multiplied by the forecast of new floorspace to estimate the number of trips generated by each use.
- 34) The amount of project costs to be covered by non-residential development was split between the four non-residential uses to determine the TUMF cost share for each.
- 35) The TUMF cost share for each of the four non-residential uses was divided by the forecast growth in floorspace to determine the fee level required from each new square foot of non-residential development to cover their fair share of the cost to mitigate the impacts of new developments.
- 36) WRCOG has adopted a TUMF Fee Calculation Handbook that allows for fee adjustments to be made to account for unusual circumstances for certain types of residential and non-residential development (fuel filling stations, golf courses, high-cube warehouses, wineries, electric charging stations, etc.) These

adjustments are intended to calculate a fairer proportional fee based on the unique trip generation characteristics of these particular development types.

The outcome of this process is a schedule of fees for the various use categories identified as part of the TUMF program. The study conclusions including the Schedule of Fees is presented in **Chapter 7** of this report. The schedule of fees represents the **maximum** fee permissible under California law for the purposes of the TUMF program. The WRCOG Executive Committee has the option to adopt lower fees, however, in doing so each use category subject to a lower fee would not be contributing a fair share of the cost of their impacts. This would in turn create a funding gap for the program that would necessitate identifying additional project funding from some other source in order to ensure the cumulative regional impacts of new development are being mitigated fully in accordance with the program.



2.0 FUTURE GROWTH

2.1 Recent Historical Trend

Western Riverside County experienced robust growth in the period from the late 1990's to the mid 2000's. The results of Census 2000 indicate that in the year 2000, Western Riverside County had a population of 1.187 million representing a 30% increase (or 2.7% average annual increase) from the 1990 population of 912,000. Total employment in Western Riverside County in 2000 was estimated by the SCAG to be 381,000 representing a 46% increase (or 3.9% average annual increase) over the 1990 employment of 261,000.

Despite the impacts of the Great Recession and the associated residential mortgage and foreclosure crisis, and more recently with the shifting of population during and following the COVID-19 pandemic, Western Riverside County has continued to grow due to the availability of relatively affordable residential and commercial property, and a generally well-educated workforce. By 2010, the population of the region had grown to 1.742 million, a further 47% growth in population from 2000. Similarly, total employment in the region had also grown from 2000 to 2010 with 434,000 employees estimated to be working in Western Riverside County. This represents a 12% increase from the 381,000 employees working in the region in 2000.

2.2 Available Demographic Data

A variety of alternate demographic information that quantifies future population, household and employment growth is available for Western Riverside County. For earlier versions of the TUMF Nexus Study, the primary available source of consolidated demographic information for Western Riverside County was provided by SCAG. SCAG is the largest of nearly 700 Councils of Government (COG) in the United States and functions as the Metropolitan Planning Organization (MPO) for six counties in Southern California including Los Angeles, Orange, San Bernardino, Riverside, Ventura and Imperial. SCAG is mandated by the federal government to research and plan for issues of regional significance including transportation and growth management. As part of these responsibilities, SCAG maintains a comprehensive database of regional socioeconomic data and develops demographic projections and travel demand forecasts for Southern California.

In preparation for the 2020 RTP/SCS, SCAG undertook robust stakeholder engagement, including participation by WRCOG, Riverside County and the various cities in Western Riverside County, to develop regional demographic forecasts. Using input from regional stakeholders regarding anticipated patterns and rates of development, SCAG compiled and disseminated the forecasts that were ultimately adopted in 2020, including those specific to Western Riverside County. The SCAG forecasts adopted for the 2020 RTP/SCS were subsequently used as the basis for RivCoM and are used as the basis for this TUMF Nexus Study Update.

2.3 Demographic Assumptions Used for the Nexus Study Analysis

A major distinction between data used for the TUMF Nexus Study 2016 Update and the SCAG 2020 RTP/SCS data used for this 2024 Update is the change in the base year from 2012 to 2018, as well as the change in the horizon year from 2040 to 2045. This shift in the base year and horizon year demographic assumptions of the program carries through all aspects of the nexus analysis, including the travel demand forecasting, network review and fee calculation.

The SCAG 2020 RTP/SCS data were compared to the 2016 RTP/SCS data used in the TUMF Nexus Study 2016 Update. As can be seen in **Table 2.1** and **Figure 2.1**, the 2018 data reflects an increase in population and single-family households, and a very slight decline in multi-family households. Employment grew substantially overall, with significant growth in industrial employment, largely attributable to the rapid expansion of warehousing and logistics facilities in Western Riverside County. In contrast, there was a notable decline in government and public sector employment in the region from 2012 to 2018

Table 2.1 - Base Year Socioeconomic Estimates for Western Riverside County

SED Type	2016 Update (2012)	2024 Update (2018)	Change	Percent
Total Population	1,773,935	1,905,440	131,505	7%
Total Households	525,149	554,573	29,424	6%
Single-Family	366,588	397,407	30,819	8%
Multi-Family	158,561	157,166	-1,395	-1%
Total Employment	460,787	570,420	109,633	24%
Industrial	120,736	169,334	48,598	40%
Retail	65,888	73,814	7,926	12%
Service	253,372	308,703	55,331	22%
Government/Public Sector	20,791	18,569	-2,222	-11%

Source: SCAG 2016 RTP/SCS; SCAG 2020 RTP/SCS

Figure 2.1 – Base Year Socioeconomic Estimates for Western Riverside County

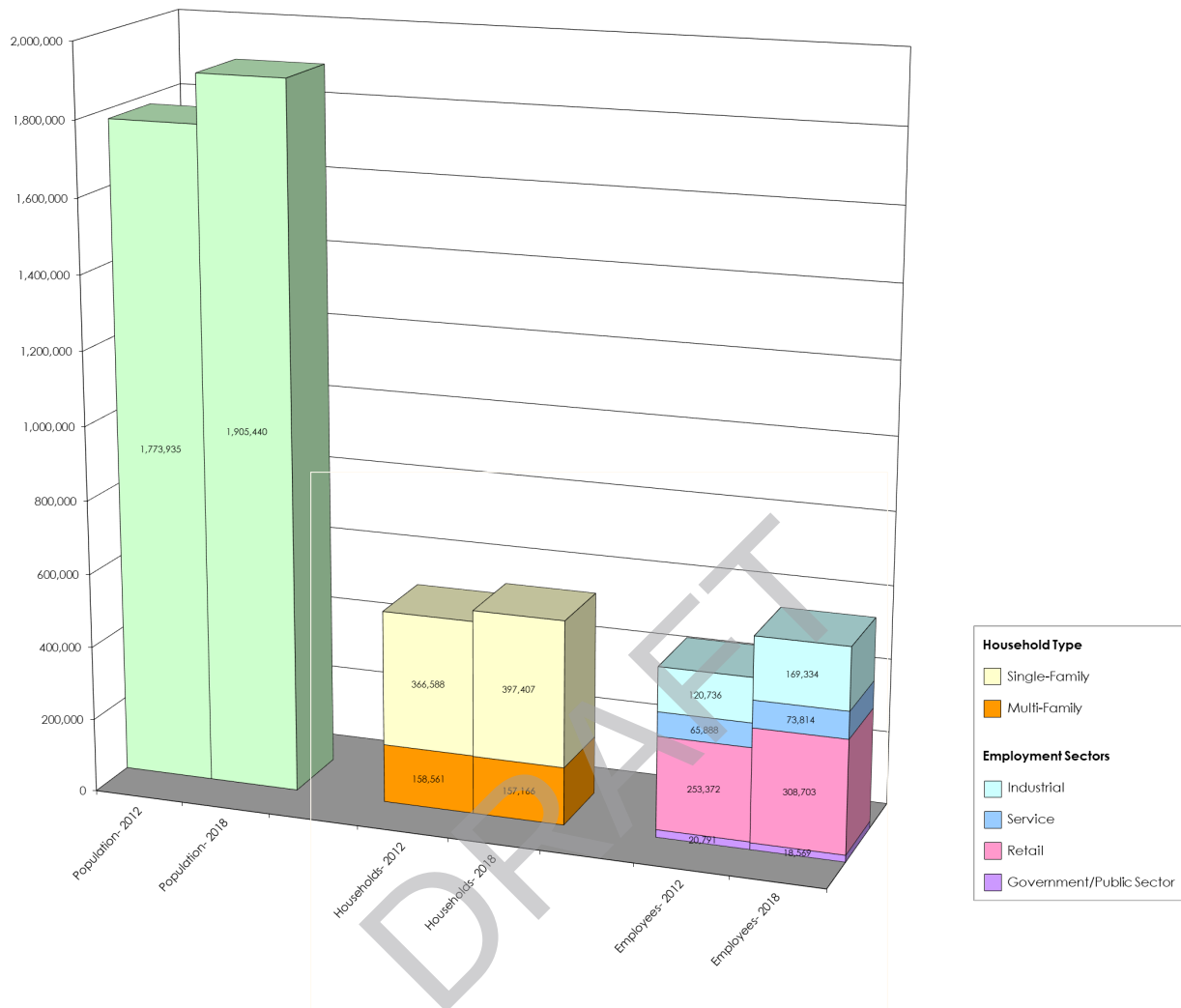


Table 2.2 and **Figure 2.2** compare the socioeconomic forecasts for the program horizon year of 2045 used in the TUMF Nexus Study 2016 Update and 2045 for this study. The most recent forecasts reflect an increase in the horizon year population and households, and a decrease in overall employment in Western Riverside County. The change in employment was not, however, consistent across sectors. The retail employment forecast has decreased approximately 15% from 2040 to 2045, while the industrial employment forecast has increased over 20%. This shift is consistent with the emergence of e-commerce as an alternative to traditional “brick and mortar” retail.

Table 2.2 - Horizon Year Socioeconomic Estimates for Western Riverside County

SED Type	2016 Update (2040)	2024 Update (2045)	Change	Percent
Total Population	2,429,633	2,533,876	104,243	4%
Total Households	775,231	812,399	37,168	5%
Single-Family	539,631	564,898	25,267	5%
Multi-Family	235,600	247,501	11,901	5%
Total Employment	861,455	846,442	-15,013	-2%
TUMF Industrial	201,328	245,915	44,587	22%
TUMF Retail	101,729	86,929	-14,800	-15%
TUMF Service	528,092	482,958	-45,134	-9%
TUMF Government/Public Sector	30,306	30,640	334	1%

Source: SCAG 2016 RTP/SCS; SCAG 2020 RTP/SCS

Figure 2.2 - Horizon Year Socioeconomic Estimates for Western Riverside County

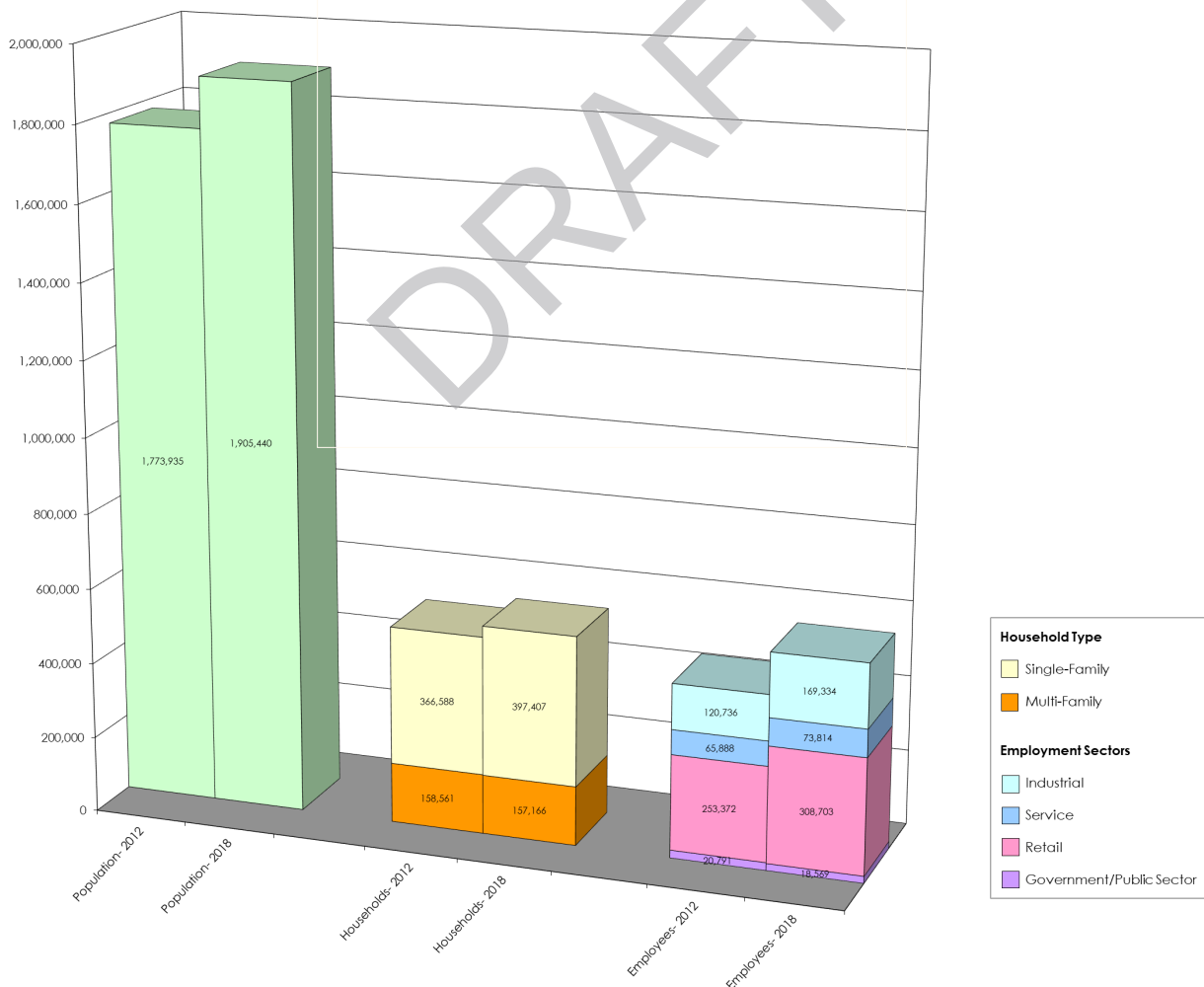


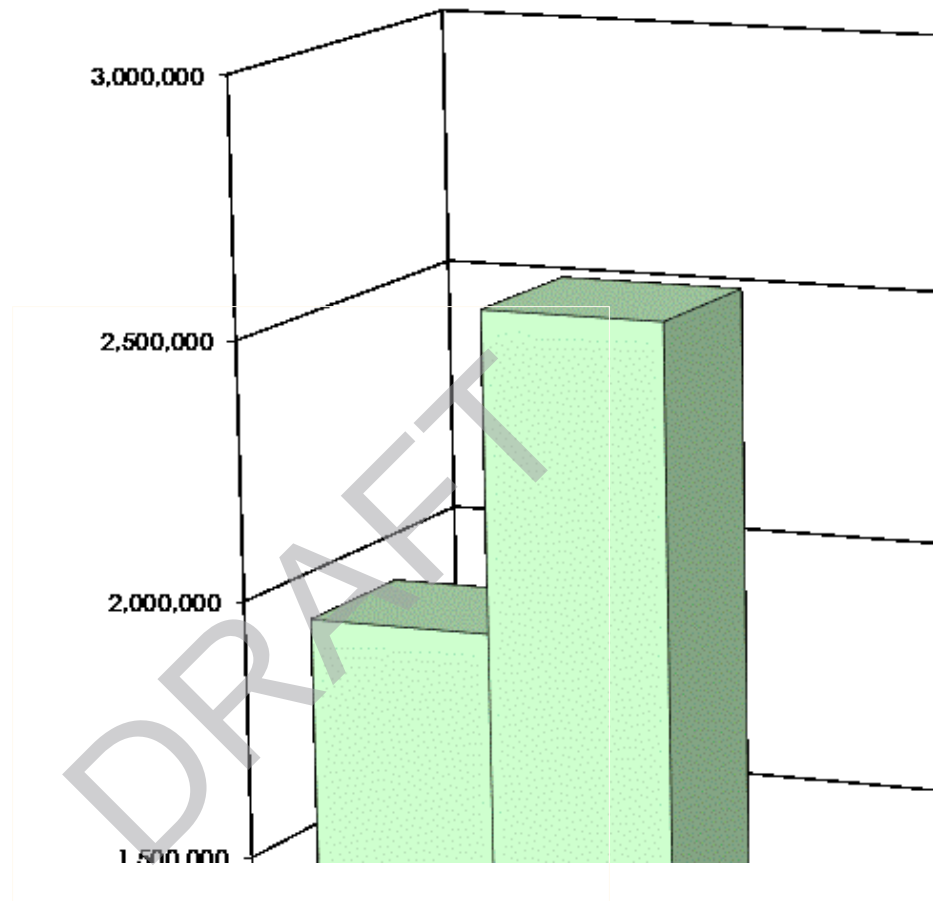
Table 2.3 and **Figure 2.3** summarize the socioeconomic data obtained from SCAG and used as the basis for completing this Nexus Study analysis. The SCAG employment data for 2018 and 2045 was provided for thirteen employment sectors consistent with the California Employment Development Department (EDD) Major Groups including: Farming, Natural Resources and Mining; Construction; Manufacturing; Wholesale Trade; Retail Trade; Transportation, Warehousing and Utilities; Information; Financial Activities; Professional and Business Service; Education and Health Service; Leisure and Hospitality; Other Service; and Government. For the purposes of the Nexus Study, the EDD Major Groups were aggregated to Industrial (Farming, Natural Resources and Mining; Construction; Manufacturing; Wholesale Trade; Transportation, Warehousing and Utilities), Retail (Retail Trade), Service (Information; Financial Activities; Professional and Business Service; Education and Health Service; Leisure and Hospitality; Other Service) and Government/Public Sector (Government). These four aggregated sector types were used as the basis for calculating the fee as described in **Section 6.2**. **Appendix B** provides a table detailing the EDD Major Groups and corresponding North American Industry Classification System (NAICS) Categories that are included in each non-residential sector type.

Table 2.3 - Population, Households and Employment in Western Riverside County (2018 to 2045)

SED Type	2018	2045	Change	Percent
Total Population	1,905,440	2,533,876	628,436	33%
Total Households	554,573	812,399	257,826	46%
Single-Family	397,407	564,898	167,491	42%
Multi-Family	157,166	247,501	90,335	57%
Total Employment	570,420	846,442	276,022	48%
TUMF Industrial	169,334	245,915	76,581	45%
TUMF Retail	73,814	86,929	13,115	18%
TUMF Service	308,703	482,958	174,255	56%
TUMF Government/Public Sector	18,569	30,640	12,071	65%

Source: SCAG 2020 RTP/SCS

**Figure 2.3 - Population, Households and Employment in Western Riverside County
(2016 to 2045)**



The combined effects of the changes in the base year and horizon year socioeconomic data are modest reductions in the total growth in population and single-family households, but a notable increase in multi-family households. The change in total employment is reduced by 31%, with the most significant reduction in employment growth in the retail sector (-63%), while the industrial sector saw only a slight reduction in total employment growth compared to the 2016 Nexus Update (5%). The Government/public sector employment growth has increased by 27% from the 2016 Nexus Study to the 2024 Nexus Study, although the total number of jobs increased is relatively small as a share of the total employment. **Table 2.4** and **Figure 2.4** provide a comparison of the changes in population, households and employment between the 2016 Nexus Update and the 2024 Nexus Update. The table and figure clearly illustrate the reduction in the rate of growth in Western Riverside County largely attributable to the effects of the economic recession. This reduced rate of growth in the region will serve as the basis for reevaluating the level of impact of new development on the

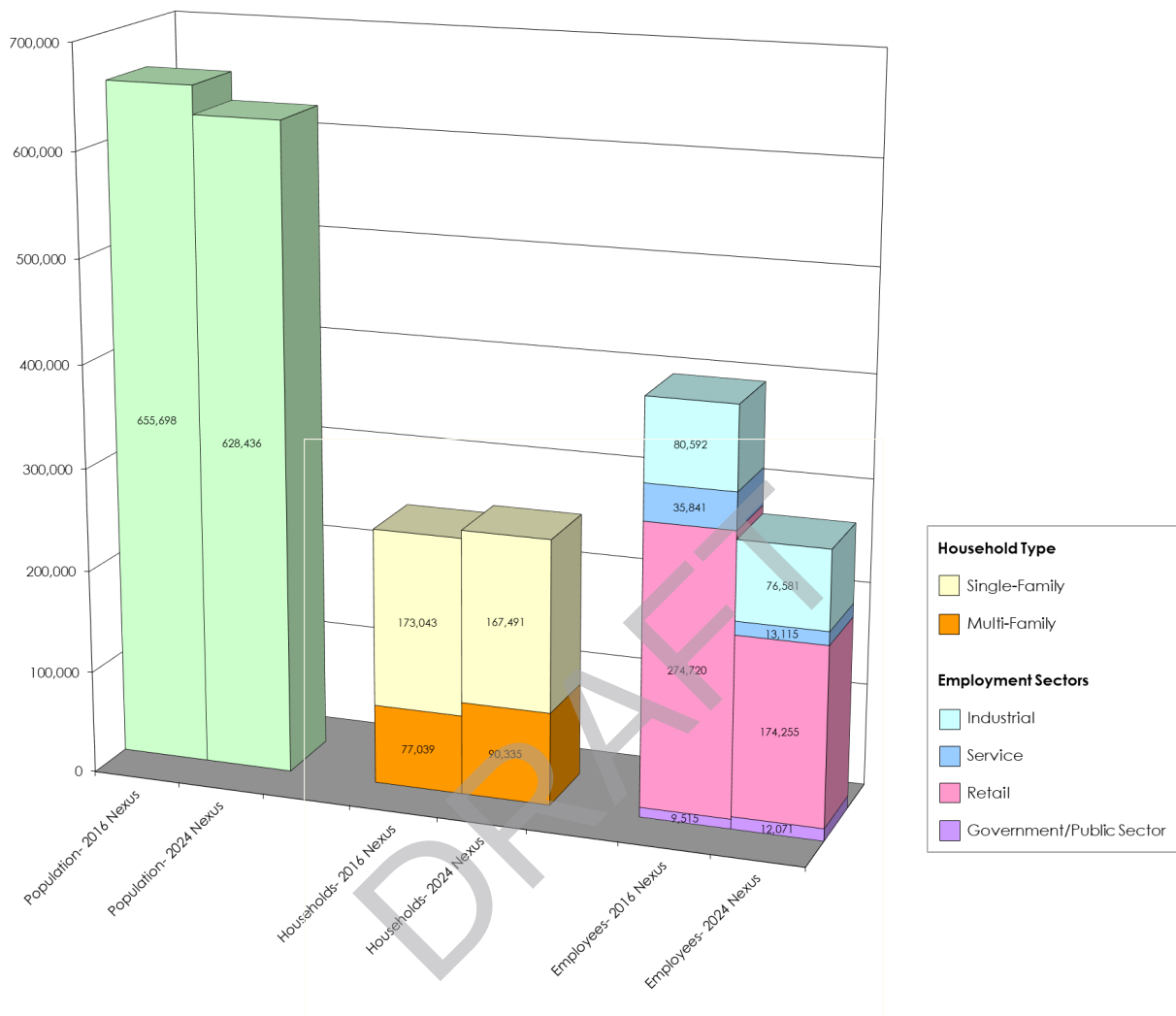
transportation system in the next section, as well as providing the basis for the determination of the fair share fee for each land use type.

**Table 2.4 - Population, Households and Employment in Western Riverside County
(Existing to Future Change Comparison)**

SED Type	2016 Update (2012-2040)	2024 Update (2018-2045)	Difference	Percent
Total Population	655,698	628,436	-27,262	-4%
Total Households	250,082	257,826	7,744	3%
Single-Family	173,043	167,491	-5,552	-3%
Multi-Family	77,039	90,335	13,296	17%
Total Employment	400,668	276,022	-124,646	-31%
TUMF Industrial	80,592	76,581	-4,011	-5%
TUMF Retail	35,841	13,115	-22,726	-63%
TUMF Service	274,720	174,255	-100,465	-37%
TUMF Government/Public Sector	9,515	12,071	2,556	27%

Source: SCAG 2016 RTP/SCS; SCAG 2020 RTP/SCS

**Figure 2.4 - Population, Households and Employment in Western Riverside County
(Existing to Future Change Comparison)**



3.0 NEED FOR THE TUMF

All new developments have some effect on the transportation infrastructure in a community, city or county due to an increase in travel demand. Increasing usage of the transportation facilities leads to more traffic, progressively increasing VMT, traffic congestion and decreasing the level of service (LOS)³. To meet the increased travel demand and keep traffic flowing, improvements to transportation facilities become necessary to sustain pre-development traffic conditions.

The projected growth in Western Riverside County (33% growth in population and 48% growth in employment in 27 years) and the related growth in VMT can be expected to increase congestion and degrade mobility if substantial investments are not made in the transportation infrastructure. This challenge is especially critical for arterial highways and roadways that carry a significant number of the trips between cities, since traditional sources of transportation improvement funding (such as the gasoline tax and local general funds) will not be nearly sufficient to fund the improvements needed to serve new development. Development exactions generally provide only a fraction of the improvements with those being confined to the area immediately adjacent to the respective development, and the broad-based county-level funding sources (i.e., Riverside County's half-cent sales tax known as Measure A) designate only a small portion of their revenues for arterial roadway improvements.

This section documents the existing and future congestion levels that demonstrate the need for future improvements to the transportation system to specifically mitigate the cumulative regional transportation impacts of new development. It then describes the TUMF concept that has been developed to fund future new developments' fair share of needed improvements.

The forecast of future congestion levels is derived from Year 2045 No-Build travel demand forecasts for Western Riverside County developed using RivCoM. The Year 2045 No-Build scenario evaluates the effects of 2045 population, employment and resultant traffic generation on the 2021 existing arterial highway network.

3.1 Future Highway Congestion Levels

To support the evaluation of the cumulative regional impacts of new development on the existing arterial highway system in Western Riverside County, existing (2018) and future (2045) SED were modeled on the existing (2021) arterial highway network using RivCoM. To quantify traffic growth impacts, various traffic measures of effectiveness were calculated for the AM and PM peak periods for each of the two scenarios. The

³ The Highway Capacity Manual 6th Edition – A Guide for Multimodal Mobility Analysis (Transportation Research Board, National Academy of Sciences, Washington, D.C., 2016, Volume 1 – Concepts, pp 5-3) describes LOS as a “quantitative stratification of performance measure or measures representing quality of service....HCM defines six levels of service, ranging from A to F, for each service measure or combination of measures. LOS A represents the best operating conditions from the traveler's perspective and LOS F the worst.”

WRCOG TUMF study area was extracted from the greater regional model network for the purpose of calculating measures for Western Riverside County only. Peak period performance measures for the Western Riverside County TUMF study area included total VMT, total vehicle hours of travel (VHT), total combined vehicle hours of delay (VHD), and total VMT experiencing unacceptable level of service (LOS E). These results were tabulated in **Table 3.1**. Plots of the Network Extents are attached in **Appendix C**.

Total Arterial VMT, VHT, VHD and LOS E Threshold VMT were calculated to include all principal arterials, minor arterials and major connectors, respectively. Regional values for each threshold were calculated for a total of all facilities including arterials, freeways, freeway ramps and High-Occupancy Vehicle (HOV) lanes.

Table 3.1 - Regional Highway System Measures of Performance (2018 Existing to 2045 No-Build)

Measure of Performance*	Peak Periods (Total)			
	2018 Existing	2045 No-Build	% Change	% Annual
VMT - Total ALL FACILITIES	23,284,724	29,897,254	28%	0.9%
VMT - FREEWAYS	13,514,522	15,490,284	15%	0.5%
VMT - ALL ARTERIALS	9,770,202	14,406,970	47%	1.4%
TOTAL - TUMF ARTERIAL VMT	6,216,985	8,597,200	38%	1.2%
VHT - TOTAL ALL FACILITIES	541,350	915,439	69%	2.0%
VHT - FREEWAYS	263,792	399,128	51%	1.5%
VHT - ALL ARTERIALS	277,558	516,311	86%	2.3%
TOTAL TUMF ARTERIAL VHT	174,455	320,869	84%	2.3%
VHD - TOTAL ALL FACILITIES	108,900	338,056	210%	4.3%
VHD - FREEWAYS	66,156	170,649	158%	3.6%
VHD - ALL ARTERIALS	42,745	167,407	292%	5.2%
TOTAL TUMF ARTERIAL VHD	33,249	124,863	276%	5.0%
VMT LOS E - TOTAL ALL FACILITIES	5,605,070	13,369,483	139%	3.3%
VMT LOS E - FREEWAYS	4,725,471	9,316,891	97%	2.5%
VMT LOS E & F - ALL ARTERIALS	879,599	4,052,592	361%	5.8%
TOTAL TUMF ARTERIAL VMT w/ LOS E or worse	765,782	3,184,133	316%	5.4%
% of TUMF ARTERIAL VMT w/ LOS E or worse	12%	37%		

* Based on RivCoM 2018 base network and SCAG 2020 RTP/SCS SED with updated 2021 arterial network as existing in December 2021

NOTES:

Volume is adjusted by PCE factor

VMT = vehicle miles of travel (the total combined distance that all vehicles travel on the system)

VHT = vehicle hours of travel (the total combined time that all vehicles are traveling on the system)

VHD = vehicle hours of delay (the total combined time that all vehicles have been delayed on the system based on the difference between forecast travel time and free-flow (ideal) travel time)

LOS = level of service (based on forecast volume to capacity ratios).

LOS E or Worse was determined by V/C ratio that exceeds 0.9 thresholds as indicated in the Riverside County General Plan.

The following formulas were used to calculate the respective values:

$VMT = \text{Link Distance} * \text{Total Daily Volume}$

$VHT = \text{Average Loaded (Congested) Link Travel Time} * \text{Total Daily Volume}$

$VHD = VHT - (\text{Free-flow (Uncongested) Link Travel Time} * \text{Total Daily Volume})$

$VMT \text{ LOS E or F} = VMT \text{ (on links where Daily V/C exceeded 0.90)}$

Note: Volume to capacity (v/c) ratio thresholds for LOS E are based on the Transportation Research Board 2010 Edition of the Highway Capacity Manual (HCM 2010) LOS Maximum V/C Criteria for Multilane Highways with 45 mph Free Flow Speed (Exhibit 14-5, Chapter 14, Page 14-5).

The calculated values were compared to assess the total change between 2018 Existing and 2045 No-Build scenarios, and the average annual change between 2018 Existing and 2044 No-Build. As can be seen from the RivCoM outputs summarized in **Table 3.1**, the additional traffic generated by new development will cause peak period VMT on the arterial highway network to increase by approximately 47% by the year 2045 (approximately 1.4% per year). In the absence of additional improvements to the transportation network in Western Riverside County, the growth in VMT will cause congestion on the highway system to increase almost exponentially, with the most significant increase in congestion observed on the arterial highway system that includes the TUMF Network. Many facilities will experience a significant increase in vehicle delay and deterioration in LOS to unacceptable levels because of new development and the associated growth in traffic. According to the Highway Capacity Manual 6th Edition – A Guide for Multimodal Mobility Analysis (Transportation Research Board, National Academy of Sciences, Washington, D.C., 2016), “LOS E describes operation at or near capacity. Operations...at this level are highly volatile because there are virtually no usable gaps within the traffic stream, leaving little room to maneuver within the traffic stream. Any disruption to the traffic stream, such as vehicles entering...or a vehicle changing lanes, can establish a disruption wave that propagates throughout the upstream traffic stream....the physical and psychological comfort afforded drivers is poor.”

The Congestion Management Program for Riverside County (CMP) published by the Riverside County Transportation Commission (RCTC) in 2011 designates LOS E as the “traffic standards must be set no lower than LOS E for any segment or intersection along the CMP System of Highways and Roadways” in Riverside County. “The intent of the CMP is to more directly link land use, transportation, and air quality, thereby prompting reasonable growth management programs that will effectively utilize new transportation funds, alleviate traffic congestion and related impacts, and improve air quality.”⁴ The CMP provides a mechanism for monitoring congestion on the highway system and, where congestion is observed, establishes procedures for developing a deficiency plan to address improvement needs. The reactive nature of the CMP to identify and remediate existing congestion differs from the proactive nature of the TUMF program to anticipate and provide for future traffic needs. For this reason, the TUMF

⁴ Congestion Management Program for Riverside County – Executive Summary (Riverside County Transportation Commission, 2011) Page ES-3, ES-1

program follows the guidance of the Highway Capacity Manual in establishing LOS E as the threshold for unacceptable level of service, and subsequently as the basis for measuring system performance and accounting for existing needs. This approach ensures a more conservative accounting of existing system needs as part of the determination of the “fair share” of mitigating the cumulative regional impacts of future new development on the transportation system.

The continuing need for a mitigation fee on new development is shown by the adverse impact that new development will have on Western Riverside County's transportation infrastructure, and particularly the arterial highway network. As a result of the new development and associated growth in population and employment in Western Riverside County, additional pressure will be placed on the transportation infrastructure with the total peak period VMT on the Western Riverside County Regional System of Highways and Arterials (RSHA; also referred to as the TUMF Network) estimated to increase by approximately 38% or 1.2% compounded annually.

As shown in **Table 3.1**, the peak period VMT on arterial facilities within the TUMF Network experiencing LOS E or worse will increase by approximately 316% or 5.4% compounded annually in Western Riverside County in the period between 2018 and 2045. By 2045, 37% of the total VMT on the TUMF arterial highway system is forecast to be traveling on facilities experiencing daily LOS E or worse. Without improvements to the TUMF arterial highway system, the total vehicle hours of delay (VHD) experienced by area motorists on TUMF arterial highways during the peak periods will increase by approximately 5.0% per year. The combined influences of increased travel demand and worsened LOS that manifest themselves in severe congestion and delay highlighting the continuing need to complete substantial capacity expansion on the TUMF arterial highway system to mitigate the cumulative regional impact of increased travel demand resulting from new development.

The RivCoM outputs summarized in **Table 3.1** clearly demonstrate that the travel demands generated by future new development in the region will lead to increasing levels of traffic congestion, especially on the arterial roadways. The need to improve these roadways to accommodate the anticipated growth in VMT and relieve future congestion is therefore directly linked to the future development which generates the additional travel demand.

3.2 Future Transit Utilization Levels

In addition to the roadway network, public transportation will play a role in serving future travel demand in the region. Transit represents a critical component of the transportation system by providing an alternative mode choice for those not wanting to use an automobile, and particularly for those who do not readily have access to an automobile. As population and employment in Western Riverside County grows because of new development, demand for regional transit services in the region is also expected to grow.

While some future transit trips will be accommodated by inter-regional transit services such as Metrolink, a substantial number of the trips within Western Riverside County will be served by bus transit services and for this reason the provision of regional bus transit service is considered integral to addressing the cumulative regional transportation impacts of new developments. Regional bus transit services within Western Riverside County are primarily provided by RTA.

In 2023, RTA reported average weekday daily ridership of 16,575 on their network of buses⁵. The SCAG 2020 RTP/SCS forecasts for RTA average weekday daily ridership in 2045 is 57,282. These values were used to represent the existing and future transit trips consistent with the analysis of highway trips described in **Section 3.1**. The existing and future transit ridership were compared to assess the impact of new development on transit demand. Average weekday daily ridership would be expected to grow by 40,707 between 2023 and 2045, or an average increase of 1,850 weekday daily riders each year. Average weekday daily system ridership is summarized in **Appendix D**.

The future growth in demand for public transit services is reflective of the cumulative regional impacts of new development, and the associated increase in demand for all types of transportation infrastructure and services to accommodate this growth. Furthermore, bus transit ridership is expected to grow as the improved services being planned and implemented by RTA attract new riders and encourages existing riders to use transit more often as an alternative to driving. Attracting additional riders to bus transit services contributes to the mitigation of the cumulative regional transportation impacts of new development by reducing the number of trips that need to be served on the highway system. The need to provide additional bus transit services within Western Riverside County to satisfy this future demand is therefore directly linked to the future development that generates the demand.

3.3 The TUMF Concept

A sizable percentage of trip-making for any given local community extends beyond the bounds of the individual community as residents pursue employment, education, shopping and entertainment opportunities elsewhere. As new development occurs within a particular local community, this dispersal of trips of all purposes by new residents and the new business that serve them generates additional travel demand and contributes to the need for transportation improvements within their community and in the other communities of Western Riverside County. The idea behind a uniform mitigation fee is to have new development throughout the region contribute uniformly to paying the fair share cost of improving the transportation facilities that serve these trips between communities. Thus, the fee is intended to be used primarily to improve

⁵ RTA, like most public transportation agencies, have seen significant short-term declines in transit ridership resulting from changes in travel demands, mode choice and trip distribution following the COVID-19 pandemic. RTA's 2016 actual average weekday daily ridership was 30,700. Post COVID-19, the RTA actual average weekday daily ridership in 2023 was 16,575, a decline of almost 50% of pre-pandemic ridership levels. These levels would be expected to continue to recover toward pre-pandemic levels as potential riders resume more regular work schedules, and apprehension toward the use of transit services for public health reasons wane.

transportation facilities that serve trips between communities within the region (in particular, arterial roadways and regional bus transit services).

Some roadways serve trips between adjacent communities, while some also serve trips between more distant communities within the region. The differing roadway functions led to the concept of using a portion of the fee revenues for a backbone system of arterial roadways that serve the longer-distance trips (i.e. using TUMF revenues from the entire region), while using a second portion of the fee revenues for a secondary system of arterials that serve inter-community trips within a specific subregion or zone (i.e. using TUMF revenues from the communities most directly served by these roads – to some extent, a return-to-source of that portion of the funds). Reflecting the importance of public transit to provide an alternative to highway travel as part of a balanced regional transportation strategy, a third portion of fee revenues was reserved for improvements to regional bus transit services (i.e. using TUMF revenues from the entire region).

Much, but not all, of the new trip-making in a given area is generated by residential development (i.e. when people move into new homes, they create new trips on the transportation system as they travel to work, school, shopping or entertainment). Some of the new trips are generated simply by activities associated with new businesses (i.e. new businesses will create new trips through the delivery of goods and services, etc.). Apart from commute trips by local residents coming to and from work, and the trips of local residents coming to and from new businesses to get goods and services, the travel demands of new businesses are not considered to be directly attributable to residential development. The consideration of different sources of new travel demand is therefore reflected in the concept of assessing both residential and non-residential development for their related transportation impacts.

In summary, the TUMF concept includes the following:

- A uniform fee that is levied on new development throughout Western Riverside County.
- The fee is assessed roughly proportionately on new residential and non-residential development based on the relative impact of each new use on the transportation system.
- A portion of the fee is used to fund capacity improvements on a backbone system of arterial roadways that serve longer-distance trips within the region; a portion of the fee is returned to the subregion or zone in which it was generated to fund capacity improvements on a secondary system of arterial roadways that link the communities in that area; and a portion of the fee is used to fund improvements to regional bus transit services that serve trips between the communities within the region.

4.0 THE TUMF NETWORK

4.1 Identification of the TUMF Roadway Network

An integral element of the initial Nexus Study was the designation of the Western Riverside County Regional System of Highways and Arterials. This network of regionally significant highways represents those arterial and collector highway and roadway facilities that primarily support inter-community trips in Western Riverside County and supplement the regional freeway system. As a result, this system also represents the extents of the network of highways and roadways that would be eligible for TUMF funded improvements. The TUMF Network does **not** include the freeways of Western Riverside County as these facilities primarily serve longer distance inter-regional trips and a significant number of pass-through trips that have no origin or destination in Western Riverside County⁶.

The TUMF Network is the system of roadways that serve inter-community trips within Western Riverside County and therefore are eligible for improvement funding with TUMF funds. The RSHA for Western Riverside County was identified based on several transportation network and performance guidelines as follows:

1. Arterial highway facilities proposed to have a minimum of four lanes at ultimate build-out (not including freeways).
2. Facilities that serve multiple jurisdictions and/or provide connectivity between communities both within and adjoining Western Riverside County.
3. Facilities with forecast traffic volumes in excess of 20,000 vehicles per day in the future horizon year.
4. Facilities with forecast volume to capacity ratio of 0.90 (LOS E) or greater in the future horizon year.
5. Facilities that accommodate regional fixed route transit services.
6. Facilities that provide direct access to major commercial, industrial, institutional, recreational or tourist activity centers, and multi-modal transportation facilities (such as airports, railway terminals and transit centers).

Appendix E includes exhibits illustrating the various performance measures assessed during the definition of the RSHA.

Transportation facilities in Western Riverside County that generally satisfied these guidelines were initially identified, and a skeletal regional transportation framework evolved from facilities where several guidelines were observed. Representatives of all WRCOG constituent jurisdictions reviewed this framework in the context of current local transportation plans to define the TUMF Network, which was subsequently endorsed by

⁶ Since pass-through trips have no origin or destination in Western Riverside County, new development within Western Riverside County cannot be considered responsible for mitigating the impacts of pass-through trips. The impact of pass-through trips and the associated cost to mitigate the impact of pass-through trips (and other inter-regional freeway trips) is addressed in the Riverside County Transportation Commission (RCTC) Western Riverside County Freeway Strategic Plan, Phase II – Detailed Evaluation and Impact Fee Nexus Determination, Final Report dated May 31, 2008.

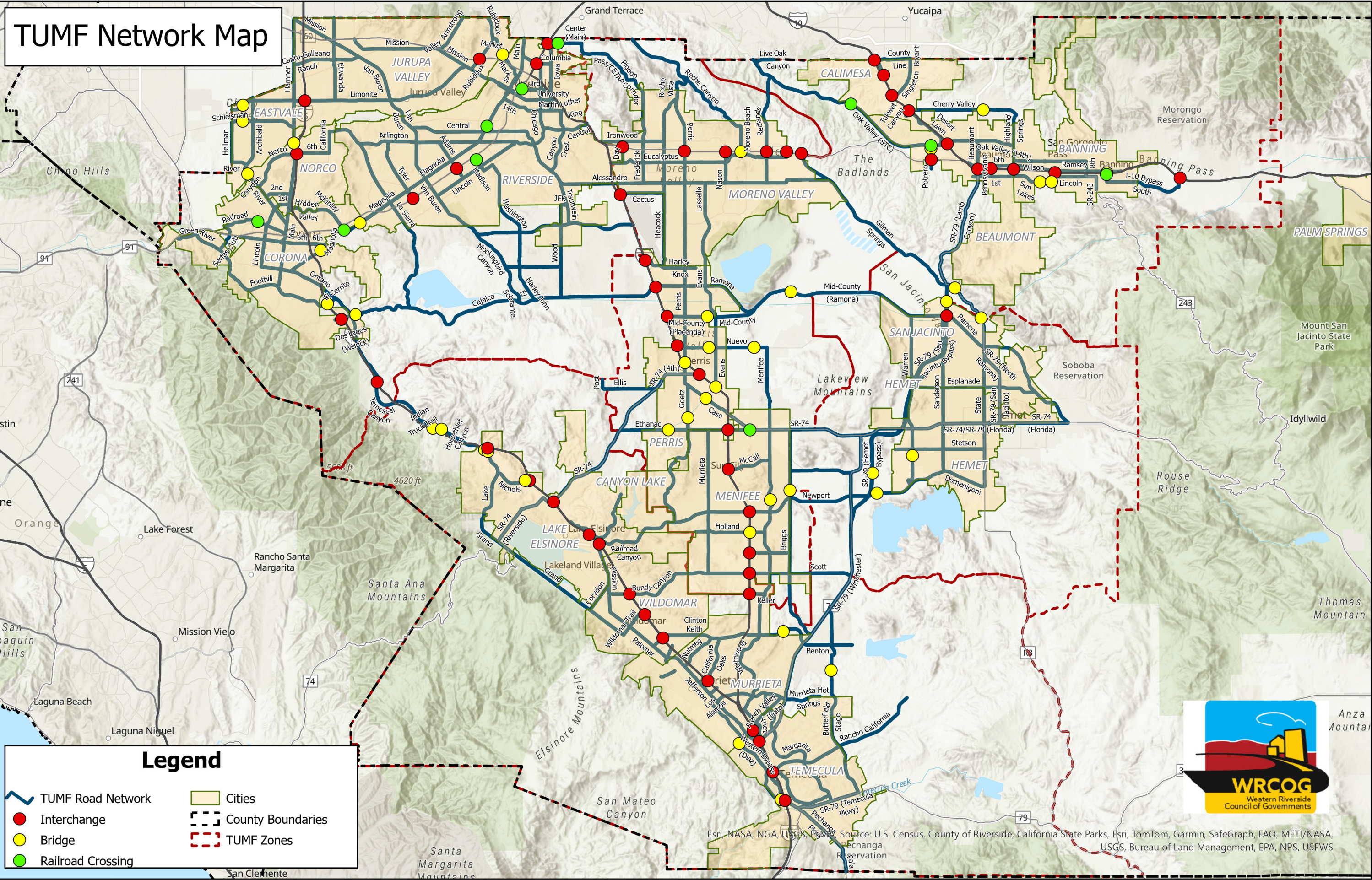
the WRCOG Public Works Committee, WRCOG Technical Advisory Committee, TUMF Policy Committee and the WRCOG Executive Committee.

The RSHA is illustrated in **Figure 4.1**. As stated previously, the RSHA represents those regional significant highway facilities that primarily serve inter-community trips in Western Riverside County and therefore also represents the extents of the network of highways and roadways that would be eligible for TUMF funded improvements.

The TUMF Network was reviewed as part of the 2024 Nexus Update to ensure facilities generally still met the previously described performance guidelines, and/or that the scope and magnitude of specific improvements to the TUMF Network were roughly proportional to the impacts needing to be mitigated. This review process resulted in the removal of various facilities from the TUMF Network, as well as various changes in the scope and magnitude of specific improvements to the TUMF Network. The resulting TUMF Network used as the basis for this Nexus Update is discussed in **Section 4.3** of this report.



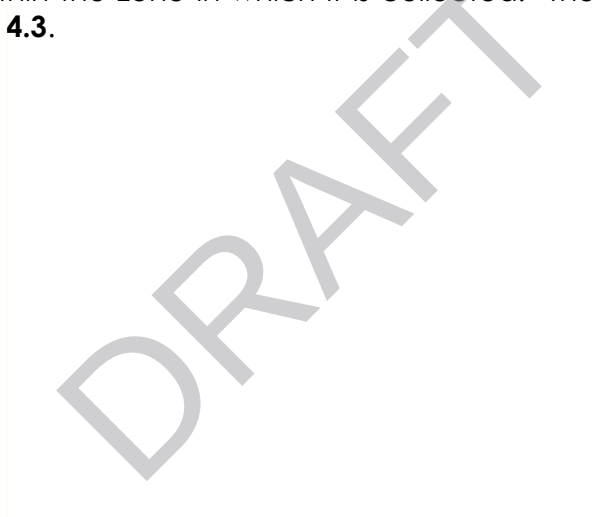
Figure 4.1 - Regional System of Highways and Arterials for Western Riverside County



4.2 Backbone Network and Secondary Network

As indicated previously, the TUMF roadway network was refined to distinguish between facilities of “Regional Significance” and facilities of “Zonal Significance.” Facilities of Regional Significance were identified as those that typically are proposed to have a minimum of six lanes at general plan build-out⁷, extend across and/or between multiple Area Planning Districts⁸, and are forecast to carry at least 25,000 vehicles per day in 2045. The Facilities of Regional Significance have been identified as the “backbone” highway network for Western Riverside County. A portion of the TUMF fee is specifically designated for improvement projects on the backbone system. The backbone network is illustrated in **Figure 4.2**.

Facilities of Zonal Significance (the “secondary” network) represent the balance of the RSHA for Western Riverside County. These facilities are typically within one zone and carry comparatively lesser traffic volumes than the backbone highway network, although they are considered significant for circulation within the respective zone. A portion of the TUMF is specifically designated for improvement projects on the secondary network within the zone in which it is collected. The WRCOG APD or zones are illustrated in **Figure 4.3**.



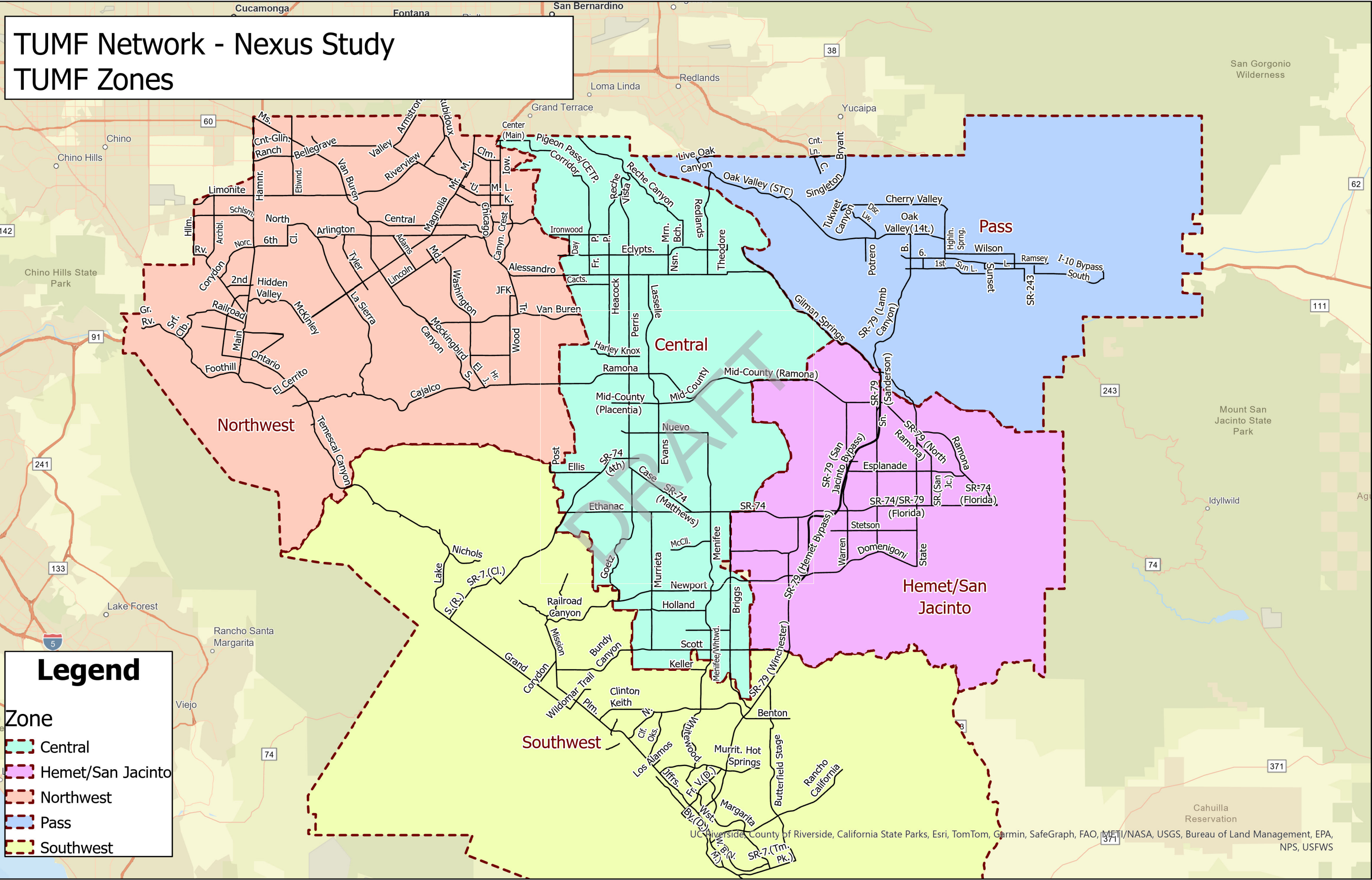
⁷ Although facilities were identified based on the minimum number of lanes anticipated at general plan buildout, in some cases it was determined that there was not sufficient demand for all additional lanes on some facilities until beyond the current timeframe of the TUMF Program (2045). As a result, only a portion of the additional lanes on these facilities have currently been identified for funding with TUMF revenues, reflecting the cumulative impact of new development through the current duration of the TUMF Program.

⁸ Area Planning Districts (APD) are the five aggregations of communities used for regional planning functions within the WRCOG area. Area Planning Districts are interchangeably referred to as TUMF Zones.

Figure 4.2 - The Backbone Network of Highways and Arterials for Western Riverside County



Figure 4.3 - WRCOG TUMF Zones



4.3 Future Roadway Transportation Needs

For the purpose of calculating a “fair share” fee for new development, it is necessary to estimate the cost of improvements on the TUMF system that will be needed to mitigate the cumulative regional impacts of future transportation demands created by new development. Estimates of the cost to improve the network to mitigate the cumulative impacts of new development were originally developed based on unit costs prepared for the Coachella Valley Association of Governments (CVAG) Regional Arterial Cost Estimate (RACE)⁹, and the WRCOG Southwest District SATISFY 2020 Summary of Cost Estimates¹⁰ (TKC/WRCOG 2000). The RACE cost estimates were developed based on a summary of actual construction costs for projects constructed in Riverside County in 1998.

The initial unit cost estimates for the TUMF (based on inflated RACE cost estimates) were reviewed in the context of the SATISFY 2020 Draft Cost Estimates and were consolidated to provide typical improvement costs for each eligible improvement type. The refinement of unit costs was completed to simplify the process of estimating the cost to improve the entire TUMF network. Based on RACE and SATISFY 2020, consolidated cost estimates included typical per mile or lump sum costs for each of the improvement types eligible under the TUMF Program. The resultant revised unit cost estimates were used as the basis for estimating the cost to complete the necessary improvements to the TUMF network to mitigate the cumulative regional transportation impacts of new development.

Variations in the consolidated cost estimates for specific improvement types were provided to reflect differences in topography and land use across the region. Unit costs for roadway construction were originally varied to account for variations in construction cost (in particular, roadway excavation and embankment cost) associated with construction on level (code 1) rolling (code 2) and mountainous (code 3) terrain, respectively. Right-of-way acquisition costs which originally included consideration for land acquisition, documentation and legal fees, relocation and demolition costs, condemnation compensation requirements, utility relocation, and environmental mitigation costs were also varied to account for variations in right-of-way costs associated with urban (developed commercial/residential mixed uses – code 1), suburban (developed residential uses – code 2) and rural (undeveloped uses – code 3) land uses, respectively. Lump sum costs for interchange improvements were originally varied to account for variations in cost associated with new complex, new standard (or fully reconstructed), or major (or partially reconstructed) or minor (individual ramp improvements) interchange improvements.

As part of the 2024 TUMF Nexus Update, the original unit cost categories were revised to generate entirely new unit cost values based on the most recent available construction cost, labor cost and land acquisition cost values for comparable projects within

⁹ Parsons Brinckerhoff/Coachella Valley Association of Governments, 1999, Regional Arterial Cost Estimate (RACE)

¹⁰ TKC/Western Riverside Council of Governments, 2000, SATISFY 2020 Summary of Cost Estimates

Riverside County. The recalculation of the TUMF unit cost components was completed as part of the 2024 Nexus Update to reflect the effects of significant changes in materials, labor and land acquisition costs including the influences of supply chain disruptions during and following the COVID-19 pandemic, and the elevated rates of inflation prevailing in the past few years. **Appendix F** provides a detailed outline of the assumptions and methodology leading to the revised TUMF unit cost assumptions developed as part of the 2024 Nexus Update. A new category was also added to the cost assumptions to facilitate the use of intelligent transportation systems (ITS) to enhance traffic flows in arterial corridors that require mitigation but cannot accommodate construction of additional lane capacity.

Section 8.5.1 of the Riverside County Integrated Project (RCIP) Multiple Species Habitat Conservation Plan (MSHCP) adopted by the Riverside County Board of Supervisors on June 17, 2003 states that “each new transportation project will contribute to Plan implementation. Historically, these projects have budgeted 3% - 5% of their construction costs to mitigate environmental impacts.” This expectation is reiterated in the Western Riverside County Multiple Species Habitat Conservation Plan Nexus Fee Study Update (Economic & Planning Systems, Inc., October 2020) Section 6 which indicates that “about 44% of the revenue for the program” is expected to be derived from non-fee sources, including “the Measure A sales tax which is authorized through 2039 and other transportation funding sources such as the Transportation Uniform Mitigation Fees (TUMF).” Consistent with the MSHCP Nexus Report, an amount equal to 5% of the construction cost for new TUMF network lanes, bridges and railroad grade separations will be specifically included as part of TUMF Program with revenues to be provided to the Western Riverside County Regional Conservation Authority (RCA) for the acquisition of land identified in the MSHCP. The relevant sections of the MSHCP document and the most recent MSHCP Nexus Report are included in **Appendix F**.

Table 4.1 summarizes the unit cost estimate assumptions used to develop the TUMF network cost estimate as part of the current Nexus Update. **Table 4.1** also includes a comparison of the original TUMF unit cost assumptions and the 2016 Nexus Study unit cost assumptions that demonstrates the significant increases in unit costs observed during recent years. In most cases the unit cost assumptions have more than doubled from those used for the 2016 Nexus Study. Cost estimates are provided in current year values as indicated.

To estimate the cost of improving the regional network to provide for traffic growth from new development, the network characteristics and performance guidelines (outlined in **Section 4.1**) were initially used as a basis for determining the needed improvements. The initial list of improvements was then compared with local General Plan Circulation Elements to ensure that the TUMF network included planned arterial roadways of regional significance. A consolidated list of proposed improvements and the unit cost assumptions were then used to establish an initial estimate of the cost to improve the network to mitigate for future traffic growth associated with new development. This initial list of proposed improvements has since been revised and updated as part of each subsequent Nexus Update to reflect the completion of projects, changing levels of development and associated changes in travel demand and transportation system impacts to be mitigated as part of the TUMF program.

Table 4.1 - Unit Costs for Arterial Highway and Street Construction

Component Type	Original Cost Assumptions as published October 18, 2002	Cost Assumptions per 2016 Nexus Study July 10, 2017	Cost Assumptions per 2024 Nexus Update	Description
Terrain 1	\$550,000	\$692,000	\$1,132,000	Construction cost per lane mile - level terrain
Terrain 2	\$850,000	\$878,000	\$1,740,000	Construction cost per lane mile - rolling terrain
Terrain 3	\$1,150,000	\$1,064,000	\$2,350,000	Construction cost per lane mile - mountainous terrain
Landuse 1	\$900,000	\$2,509,000	\$7,830,000	ROW cost factor per lane mile - urban areas
Landuse 2	\$420,000	\$2,263,000	\$5,440,000	ROW cost factor per lane mile - suburban areas
Landuse 3	\$240,000	\$287,000	\$490,000	ROW cost factor per lane mile - rural areas
Interchange 1	n/a	\$50,032,000	\$84,190,000	Complex new interchange/interchange modification cost
Interchange 2	\$20,000,000	\$25,558,000	\$43,490,000	New interchange/interchange modification total cost
Interchange 3	\$10,000,000	\$12,343,000	\$22,550,000	Major interchange improvement total cost
Bridge 1	\$2,000	\$3,180	\$4,800	Bridge total cost per lane per linear foot
RRXing 1	\$4,500,000	\$6,376,000	\$18,200,000	New Rail Grade Crossing per lane
RRXing 2	\$2,250,000	\$2,733,000	\$6,900,000	Existing Rail Grade Crossing per lane
ITS 1			\$686,400	Infrastructure for ITS of roadway segments per route mile
Planning	10%	10%	10%	Planning, preliminary engineering and environmental assessment costs based on construction cost only
Engineering	25%	25%	25%	Project study report, design, permitting and construction oversight costs based on construction cost only
Contingency	10%	10%	10%	Contingency costs based on total segment cost
Administration		4%	4%	TUMF program administration based on total TUMF eligible network cost
MSHCP		5%	5%	TUMF component of MSHCP based on total TUMF eligible construction cost

As indicated in **Table 2.4** and **Figure 2.4**, the anticipated rate of forecasted growth in Western Riverside County has been reduced by 4% for population, 3% for single-family residential and 31% for employment. This reduced rate of forecasted socioeconomic growth has a commensurate impact on the forecasted daily traffic in the region as demonstrated by the 2016 Nexus Study VMT compared to the 2024 Nexus Update VMT in **Table 4.2**. As shown in the table, the forecast peak period VMT on the TUMF arterial network in the year 2045 as the basis for the 2024 Nexus Update is more than 5% less than the comparable peak period VMT for 2040 used for the 2016 Nexus Study.

Table 4.2 – Forecasted Daily Traffic in Western Riverside County

Measure of Performance	2024 Nexus Update		2016 Nexus Study	
	Peak Period		Peak Period	
	2018 Existing	2045 No-Build	2012 Existing	2040 No-Build
VMT - Total ALL FACILITIES	23,284,724	29,897,254	19,532,437	29,277,587
VMT - FREEWAYS	13,514,522	15,490,284	11,019,155	14,487,570
VMT - ALL ARTERIALS	9,770,202	14,406,970	8,513,282	14,790,016
TOTAL - TUMF ARTERIAL VMT	6,216,985	8,597,200	5,585,202	9,089,495

Source: RivCoM 2018 base network and SCAG 2020 RTP/SCS SED with updated 2021 arterial network as existing in December 2021; RivTAM 2012 network and SCAG 2016 RTP/SCS SED with updated 2015 arterial network completed by WSP, September 2016

As a result of the reduced forecast traffic growth in the region, it is anticipated that the cumulative regional impacts of new development on the arterial highway and transit systems in the region is also reduced necessitating a reduction in the projects identified on the TUMF Network to mitigate the impacts of new development. As part of the 2024 Nexus Update, the list of proposed improvements included in the initial Nexus Study and validated during the subsequent Nexus updates was reviewed for accuracy and, where necessary, amended to remove or modify projects that have changed in need to mitigate impacts based on changes in the patterns of growth and travel demand within the region. Projects completed since the adoption of the 2016 Nexus Update were also removed from the network to reflect the fact that mitigation at these locations is no longer required. The specific network changes were screened by the WRCOG Public Works Committee for consistency with TUMF network guidelines including travel demand and traffic performance.

Based on the findings of the network screening, elements of specific projects were revised to reflect necessary network corrections and modifications to project assumptions. A matrix summarizing the disposition of the requests received as part of the 2024 TUMF Nexus Update was developed and is included in **Appendix G**.

Eligible arterial highway and street improvement types to mitigate the cumulative regional transportation impacts of new development on Network facilities include:

1. Construction of additional Network roadway lanes
2. Construction of new Network roadway segments
3. Expansion of existing Network bridge structures
4. Construction of new Network bridge structures
5. Expansion of existing Network interchanges with freeways
6. Construction of new Network interchanges with freeways
7. Grade separation of existing Network at-grade railroad crossings
8. Installation of ITS along Network roadway segments

All eligible improvement types, with the exception of ITS, provide additional capacity to Network facilities to accommodate future traffic growth generated by new development in Western Riverside County. ITS provides the ability to improve traffic

flows along corridors where capacity expansion is not possible. Following the comprehensive update of the TUMF Program, the estimated total cost to improve the RSHA for Western Riverside County is \$4.8 billion with this cost including all arterial highway and street planning, engineering, design, right-of-way acquisition and capital construction costs, but not including transit, MSHCP or program administration costs that will be subsequently described. It should be noted that the full cost to improve the TUMF Network cannot be entirely attributed to new development and must be adjusted to account for the previous obligation of other funds to complete necessary improvements and unfunded existing needs. **Sections 4.5 and 4.6** describe the adjustments to the total TUMF Network improvement need to account for existing needs and obligated funds.

In addition to the arterial highway and street improvement costs indicated above, the TUMF Nexus Update included specific consideration for the TUMF Program obligation to the MSHCP program to mitigate the impact of TUMF network improvements on species and habitat within Western Riverside County. The TUMF obligation to MSHCP was calculated at a rate of 5% of the total construction (capital) cost of new lane segments, bridges and railroad grade separations on the TUMF Network. The total obligation to the MSHCP as indicated in the TUMF Network cost fee table is approximately \$64.3 million, although the total obligation specific to the TUMF program is reduced to account for MSHCP obligations associated with improvements addressing existing needs and therefore excluded from TUMF.

The TUMF 2024 Nexus Update similarly includes specific consideration of the costs associated with WRCOG administration of the TUMF Program. The average cost for WRCOG to administer the TUMF Program was calculated at a rate of 4% of the total eligible cost of new lane segments (including interchanges, bridges and railroad grade separations) on the TUMF Network and new transit services. Administration costs incurred by WRCOG include direct salary, fringe benefit and overhead costs for WRCOG staff assigned to administer the program and support participating jurisdictions, and costs for consultant, legal and auditing services to support the implementation of the TUMF program. The total cost for WRCOG administration of the TUMF Program as indicated in the TUMF Network cost fee table is approximately \$163.1 million.

The detailed TUMF network cost calculations are provided in **Section 4.7**, including each of the individual segments and cost components considered as part of the TUMF Program, and the maximum eligible TUMF share for each segment following adjustments for obligated funding and unfunded existing needs as described in subsequent sections.

4.4 Public Transportation Component of the TUMF System

In addition to the roadway network, public transportation plays a key role in serving future travel demand in the region. Public transportation serving inter-community trips is generally provided in the form of public bus transit services and in particular express bus or other high frequency services between strategically located community transit

centers. In Western Riverside County, these bus transit services are typically provided by RTA. Transit needs to serve future regional travel in Western Riverside County via bus transit include vehicle acquisitions, transit centers, express bus stop upgrades, maintenance facilities and other associated capital improvements to develop express bus or other high frequency inter-community transit bus services within the region. Metrolink commuter rail service improvements were not included in the TUMF Program as they typically serve longer inter-regional commute trips equivalent to freeway trips on the inter-regional highway system.

The network of regionally significant bus transit services represents those express bus and other high frequency transit bus services that primarily support inter-community trips in Western Riverside County and supplement the regional highway system and inter-regional commuter rail services. As a result, this portion of the bus transit system also represents the extents of the network of bus services that would be eligible for TUMF funded improvements.

The TUMF Bus Transit Network is the system of bus services that serve inter-community trips within Western Riverside County and therefore are eligible for improvement funding with TUMF funds. The Bus Transit Network for Western Riverside County was identified based on several transit network and performance guidelines as follows:

1. Bus transit routes (or corridors comprised of multiple overlapping routes) proposed to have a frequency of greater than three buses per direction during peak hours at ultimate build out.
2. Routes or corridors that serve multiple jurisdictions and/or provide connectivity between communities, both within and adjoining western Riverside County.
3. Routes or corridors with forecast weekday bus ridership in excess of 1,000 person trips per day by 2040.
4. Routes or corridors that are proposed to provide timed interconnections with at least four other routes or corridors at ultimate build out.
5. Routes or corridors that utilize the majority of travel along the TUMF RSHA.
6. Routes or corridors that provide direct access to areas of forecast population and employment growth, major commercial, industrial, institutional, recreational or tourist activity centers, and multi-modal transportation facilities (such as airports, railway terminals and transit centers).

Express bus routes and other high-frequency bus transit routes and corridors in Western Riverside County that generally satisfied the respective guidelines were identified by RTA. Updated cost estimates for improving the infrastructure serving public transportation, including construction of transit centers and transfer facilities, express bus stop upgrades, and capital improvements needed to develop express bus and other high frequency bus transit service within the region were also provided by RTA. The updated transit unit cost data provided by RTA are shown in **Table 4.3**.

Table 4.3 - Unit Costs for Transit Capital Expenditures

Component Type*	Original Cost Assumptions as published October 18, 2002	Cost Assumptions per 2016 Nexus Study July 10, 2017	Cost Assumptions per 2024 Nexus Update	Description
Transit Center 1		\$6,000,000	\$7,465,000	Relocation/expansion of existing Regional Transit Center with up to 14 bus bays and park and ride
Transit Center 2	\$6,000,000	\$9,000,000	\$11,195,000	New Regional Transit Center with up to 14 bus bays and park and ride
Transfer Facility		\$1,000,000	\$1,245,000	Multiple route transfer hub
O & M Facility		\$50,000,000	\$62,186,000	Regional Operations and Maintenance Facility
Green Technology			\$100,000	ZEB technology enhancements
Bus Stop	\$10,000	\$40,000	\$50,000	Bus Stop Amenities Upgrade on TUMF Network
BRT Service Capital	\$540,000	\$60,000	\$75,000	BRT/Limited Stop Service Capital (per stop**)
Vehicle Fleet 1***			\$160,000	Small Sized Bus/Van Contract Operated
Vehicle Fleet 2		\$155,000	\$300,000	Medium Sized Bus Contract Operated
Vehicle Fleet 3	\$325,125	\$585,000	\$1,271,000	Large Sized Bus Directly Operated
COA Study		\$950,000	\$1,150,000	Comprehensive Operational Analysis Study component of Nexus Study Update

* Transit Cost Component Types were restructured as part of the 2016 Nexus Update in accordance with the RTA Comprehensive Operational Analysis (January 2015)

** BRT Service Capital Cost Assumption was based on a per mile unit prior to the 2016 Nexus Update. 2016 Nexus Update uses a per stop unit cost for BRT Service Capital

*** Vehicle Fleet component was restructured as part of the 2024 Nexus Update with the inclusion of Small Sized Bus/Van Contract Operated as Vehicle Fleet 1 and subsequent renumbering of Vehicle Fleet 2 and 3, respectively

The estimated total cost for future RTA bus transit services to accommodate forecast transit demand is approximately \$217.9 million with this cost including all planning, engineering, design and capital improvement costs. Detailed transit component cost estimates are included in **Section 4.7**. The full cost to improve RTA bus transit services cannot be entirely attributed to new development and must be adjusted to account for existing needs. **Section 4.6** describes the adjustments to the total transit cost to account for existing needs.

4.5 Existing Obligated Funding

For some of the facilities identified in the TUMF network, existing obligated funding has previously been secured through traditional funding sources to complete necessary improvements. Since funding has been obligated to provide for the completion of needed improvements to the TUMF system, the funded cost of these improvements will not be recaptured from future developments through the TUMF Program. As a result, the TUMF network cost was adjusted accordingly to reflect the availability of obligated funds.

To determine the availability of obligated funds, WRCOG staff, in conjunction with RCTC staff, completed a review of the current Federal Transportation improvement Program (FTIP) to identify TUMF eligible projects that were also programmed to receive funding from alternate sources. A table summarizing the obligated funds for segments of the TUMF network is included in **Appendix H**. A total of \$277.3 million in obligated funding was identified for improvements to the TUMF system. The estimated total TUMF network project cost was subsequently reduced by this amount.

4.6 Unfunded Existing Improvement Needs

A review of the existing traffic conditions on the TUMF network (as presented in **Table 3.1**) indicates that some segments of the roadways on the TUMF system currently experience congestion and operate at unacceptable levels of service. In addition, demand for inter-community transit service already exists and future utilization of proposed inter-community transit services will partially satisfy this existing demand. The need to improve these portions of the system is generated, at least in part, by existing demand, rather than solely the cumulative regional impacts of future new development, so future new development cannot be assessed for the equivalent cost share of improvements providing for this existing need.

To account for existing need in the TUMF Network, the cost for facilities identified as currently experiencing LOS E or F was adjusted. This was done by identifying the portion of any segment of the TUMF Network with a volume to capacity (v/c) ratio of greater than 0.9 (the threshold for LOS E) in the RivCoM 2018 Existing scenario and extracting the share of the overall facility cost to improve that portion. This cost adjustment provides for the mitigation of incremental traffic growth on those TUMF segments with an existing high level of congestion. The following approach was applied to account for incremental traffic growth associated with new development as part of the existing need methodology:

1. Facilities with an existing need were identified by reviewing the RivCoM 2018 Existing scenario assigned traffic on the 2021 existing network and delineating

those facilities included on the TUMF Cost Fee Summary Table that have an average directional v/c exceeding 0.90¹¹.

- a. Weighted directional v/c values were used to determine existing need for network segments, which was calculated by:
 - i. Determining the length for the portion of each segment (model link), and calculating the ratio of link length to the overall segment length
 - ii. Generating the average directional v/c for each link, for both directions in AM and PM periods, and multiplying by link/segment length ratio
 - iii. Determining the maximum peak-period peak-direction v/c for each link, representing the highest directional v/c in either AM or PM
 - iv. Calculating weighted average v/c for each TUMF segment, based on the sum of all weighted max v/c values of each link within a segment
 - b. A similar method was used to determine existing need for spot improvements including interchanges, railroad crossings and bridges. However, no weighting was used in the calculation of existing need for spot improvements. For these facilities, the peak-period peak-direction v/c values (highest directional v/c in either AM or PM) were utilized in the existing need calculation. This was based on the individual link within a network segment where a bridge or railroad crossing is located, or on- and off-ramps in the case of interchanges.
2. Initial costs of addressing the existing need were calculated by estimating the share of a particular roadway segments "new lane" cost, or individual spot improvement cost (including all associated ROW and soft costs).
 3. Incremental growth in v/c was determined by comparing the average directional existing year v/c for the TUMF facilities (delineated under step one) with the horizon year v/c for the corresponding segments and spot improvements calculated based on the RivCoM 2045 No-Build scenario assigned traffic on the 2021 existing network using the same methodology as the existing year v/c.

¹¹ The RivCoM 2021 Existing Network used for the TUMF Nexus Study analyses reflects the RivCoM 2018 base year network augmented to include highways facilities on the TUMF Network as they existed in December 2021. A second version of the base network was also developed adding only those facilities that had been identified on the 2016 TUMF Nexus study 2040 Build scenario that did not currently exist in December 2021 and therefore were not represented by a link(s) in the RivCoM base network. The Supplemental 2021 Existing Network was utilized as the basis for determining existing and future v/c for only those projects that did not currently exist on the 2021 TUMF Network.

4. The proportion of the incremental growth attributable to new development was determined by dividing the result of step three with the total 2045 No-Build scenario v/c in excess of LOS E.
5. For those segments experiencing a net increase in v/c over the base year, TUMF will 'discount' the cost of existing need improvements by the proportion of the incremental v/c growth through 2045 No-Build compared to the 2018 Baseline v/c (up to a maximum of 100%).

The unfunded cost of existing highway improvement needs (including the related MSHCP obligation) totals \$586.6 million. **Appendix H** includes a detailed breakdown of the existing highway improvement needs on the TUMF network, including the associated unfunded improvement cost estimate for each segment and spot improvement experiencing unacceptable LOS.

For transit service improvements, the cost to provide for existing demand was determined by multiplying the total transit component cost by the share of future transit trips representing existing demand. The cost of existing transit service improvement needs is \$63.0 million representing 28.9% of the TUMF transit component. **Appendix H** includes tables reflecting the calculation of the existing transit need share and the existing transit need cost.

4.7 Maximum TUMF Eligible Cost

A total of \$277.3 million in obligated funding was identified for improvements to the TUMF system. Since these improvements are already funded with other available revenue sources, the funded portion of these projects cannot also be funded with TUMF revenues. Furthermore, the total cost of the unfunded existing improvement need is \$586.6 million. These improvements are needed to mitigate existing transportation deficiencies and therefore their costs cannot be assigned to new development through TUMF.

Based on the estimated costs described in **Sections 4.3** and **4.4**, the total value to complete the identified TUMF network and transit improvements, and administer the program is \$5.2 billion. Having accounted for obligated funds and unfunded existing needs as described in **Sections 4.5** and **4.6**, respectively, the estimated maximum eligible value of the TUMF Program is \$4.3 billion. The maximum eligible value of the TUMF Program includes approximately \$3.9 billion in eligible arterial highway and street related improvements and \$154.8 million in eligible transit related improvements. An additional \$57.2 million is also eligible as part of the TUMF Program to mitigate the impact of eligible TUMF related arterial highway and street projects on critical native species and wildlife habitat, while \$163.1 million is provided to cover the costs incurred by WRCOG to administer the TUMF Program.

Figure 4.4 illustrates the various improvements to the RSHA included as part of the TUMF network cost calculation. **Table 4.4** summarizes the TUMF network cost calculations for each of the individual segments. This table also identifies the maximum eligible TUMF share for each segment having accounted for obligated funding and unfunded

existing need. A detailed breakdown of the individual cost components and values for the various TUMF Network segments is included in **Appendix H. Table 4.5** outlines the detailed transit component cost estimates. It should be noted that the detailed cost tables (and fee levels) are subject to regular review and updating by WRCOG and therefore WRCOG should be contacted directly to obtain the most recently adopted version of these tables (and to confirm the corresponding fee level).



Figure 4.4 - Regional System of Highways and Arterials–TUMF Network Improvements



Figure 4.4

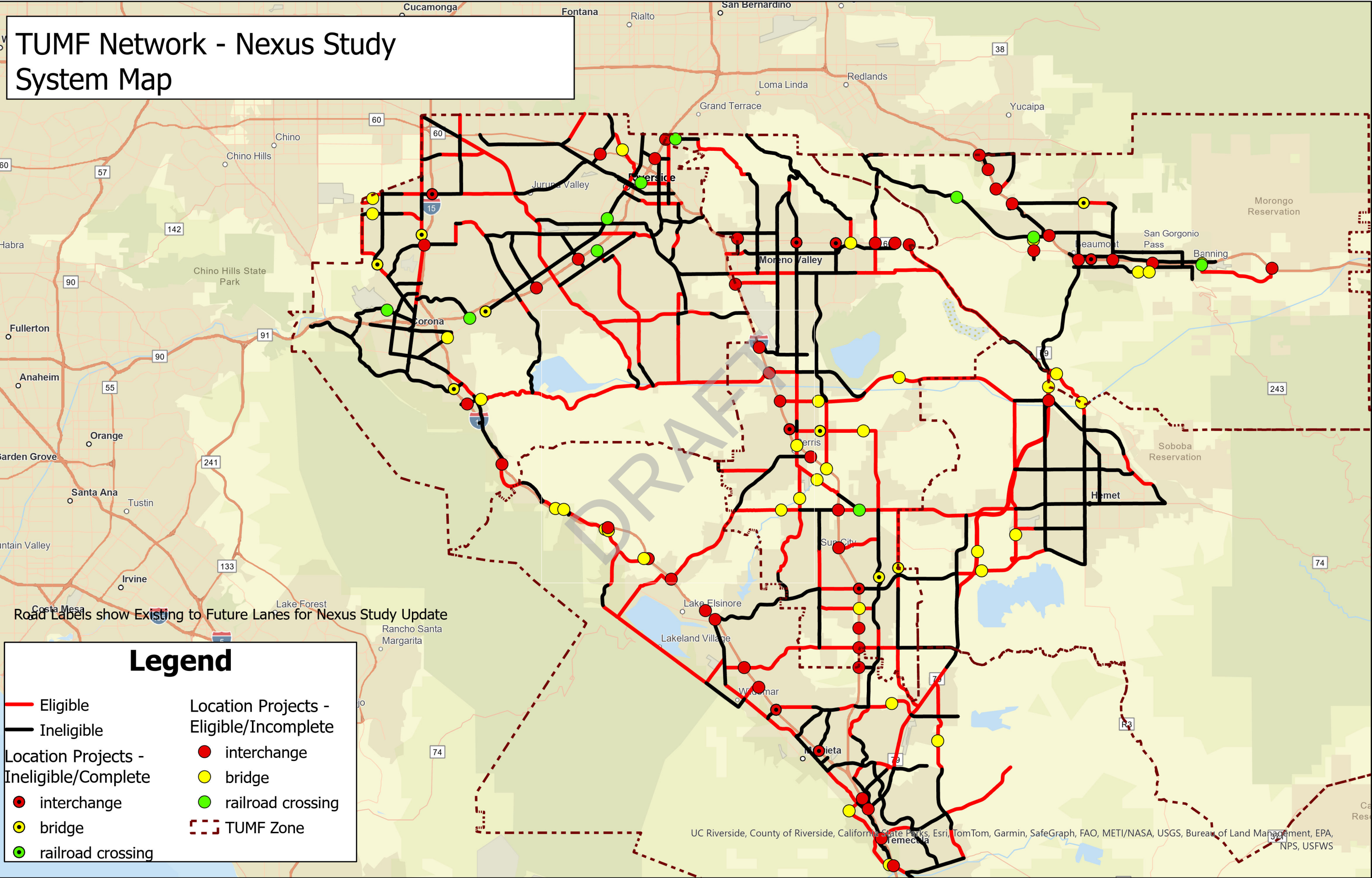


Table 4.4 - TUMF Network Cost Estimates

AREA	PLAN	DIST	CITY	STREETNAME	SEGMENTFROM	SEGMENTTO	TOTAL COST	MAXIMUM TUMF SHARE
Central			Menifee	Ethanac	Goetz	Murrieta	\$0	\$0
Central			Menifee	Ethanac	I-215	I-215	\$0	\$0
Central			Menifee	Ethanac	I-215	interchange	\$32,698,000	\$32,698,000
Central			Menifee	Ethanac	Sherman	Matthews	\$2,674,000	\$2,674,000
Central			Menifee	Ethanac	BNSF San Jacinto Branch	railroad crossing	\$105,560,000	\$105,560,000
Central			Menifee	Menifee	SR-74 (Pinacate)	Simpson	\$1,307,000	\$1,307,000
Central			Menifee	Menifee	Salt Creek	bridge	\$4,384,000	\$4,384,000
Central			Menifee	Menifee	Simpson	Aldergate	\$0	\$0
Central			Menifee	Menifee	Aldergate	Newport	\$0	\$0
Central			Menifee	Menifee	Newport	Holland	\$0	\$0
Central			Menifee	Menifee	Holland	Garbani	\$0	\$0
Central			Menifee	Menifee	Garbani	Scott	\$4,353,000	\$4,353,000
Central			Menifee	Menifee/Whitewood	Scott	Murrieta City Limit	\$0	\$0
Central			Menifee	Newport	Goetz	Murrieta	\$0	\$0
Central			Menifee	Newport	Murrieta	I-215	\$1,130,000	\$1,130,000
Central			Menifee	Newport	I-215	Menifee	\$0	\$0
Central			Menifee	Newport	Menifee	Lindenberger	\$0	\$0
Central			Menifee	Newport	Lindenberger	SR-79 (Winchester)	\$0	\$0
Central			Menifee	Scott	I-215	Briggs	\$8,635,000	\$8,635,000
Central			Menifee	Scott	I-215	interchange	\$0	\$0
Central			Menifee	Scott	Sunset	Murrieta	\$4,388,000	\$4,388,000
Central			Menifee	Scott	I-215	Murrieta	\$16,949,000	\$12,949,000
Central			Menifee	SR-74	Matthews	Briggs	\$8,254,000	\$8,254,000
Central			Moreno Valley	Alessandro	I-215	Perris	\$13,420,000	\$13,420,000
Central			Moreno Valley	Alessandro	Perris	Nason	\$0	\$0
Central			Moreno Valley	Alessandro	Nason	Moreno Beach	\$0	\$0
Central			Moreno Valley	Alessandro	Moreno Beach	Gilman Springs	\$18,019,000	\$18,019,000
Central			Moreno Valley	Gilman Springs	SR-60	Alessandro	\$7,291,000	\$7,291,000
Central			Moreno Valley	Gilman Springs	SR-60	interchange	\$0	\$0
Central			Moreno Valley	Perris	Reche Vista	Ironwood	\$0	\$0
Central			Moreno Valley	Perris	Ironwood	Sunnymead	\$0	\$0
Central			Moreno Valley	Perris	SR-60	interchange	\$32,698,000	\$11,192,000
Central			Moreno Valley	Perris	Sunnymead	Cactus	\$0	\$0
Central			Moreno Valley	Perris	Cactus	Harley Knox	\$0	\$0
Central			Moreno Valley	Reche Vista	Country	Heacock	\$7,486,000	\$3,799,000
Central			Perris	11th/Case	Perris	Goetz	\$4,582,000	\$4,582,000
Central			Perris	Case	Case	I-215	\$20,876,000	\$20,876,000
Central			Perris	Case	San Jacinto River	bridge	\$1,740,000	\$1,235,000
Central			Perris	Ethanac	Goetz	Goetz	\$6,056,000	\$6,056,000
Central			Perris	Ethanac	San Jacinto River	bridge	\$5,568,000	\$5,568,000
Central			Perris	Ethanac	I-215	Sherman	\$5,316,000	\$5,316,000
Central			Perris	Goetz	Case	Ethanac	\$284,000	\$188,000
Central			Perris	Goetz	San Jacinto River	bridge	\$5,568,000	\$3,398,000
Central			Perris	Mid-County (Placentia)	I-215	Perris	\$15,655,000	\$15,655,000
Central			Perris	Mid-County (Placentia)	I-215	interchange	\$63,061,000	\$63,061,000
Central			Perris	Mid-County (Placentia)	Perris	Evans	\$22,985,000	\$22,985,000
Central			Perris	Mid-County (Placentia)	Perris Valley Storm Channel	bridge	\$8,352,000	\$8,352,000
Central			Perris	Perris	Harley Knox	Ramona	\$0	\$0
Central			Perris	Perris	Ramona	Citrus	\$7,063,000	\$7,063,000
Central			Perris	Perris	Citrus	Nuevo	\$0	\$0
Central			Perris	Perris	Nuevo	11th	\$6,927,000	\$6,927,000
Central			Perris	Perris	I-215 overcrossing	bridge	\$0	\$0
Central			Perris	Ramona	I-215	Perris	\$5,039,000	\$5,039,000
Central			Perris	Ramona	I-215	interchange	\$32,698,000	\$7,725,000
Central			Perris	Ramona	Perris	Evans	\$0	\$0
Central			Perris	Ramona	Evans	Mid-County (2,800 ft E of Rider)	\$0	\$0
Central			Perris	SR-74 (4th)	I-215	I-215	\$0	\$0
Central			Unincorporated	Ethanac	SR-74	Keystone	\$4,666,000	\$4,666,000
Central			Unincorporated	Gilman Springs	Alessandro	Bridge Road	\$30,601,000	\$30,601,000
Central			Unincorporated	Menifee	Nuevo	SR-74 (Pinacate)	\$16,684,000	\$16,684,000
Central			Unincorporated	Mid-County	Evans	Ramona (2,800 ft E of Rider)	\$12,156,000	\$12,156,000
Central			Unincorporated	Mid-County (Ramona)	Ramona (2,800 ft E of Rider)	Pico Avenue	\$0	\$0
Central			Unincorporated	Mid-County (Ramona)	Pico Avenue	Bridge Road	\$47,769,000	\$47,769,000
Central			Unincorporated	Mid-County (Ramona)	San Jacinto River	bridge	\$36,192,000	\$36,192,000
Central			Unincorporated	Reche Canyon	San Bernardino County	Reche Vista	\$0	\$0
Central			Unincorporated	Reche Vista	Reche Canyon	Country	\$0	\$0
Central			Unincorporated	Scott	Briggs	SR-79 (Winchester)	\$0	\$0
Central			Unincorporated	SR-74	Ethanac	Ellis	\$0	\$0
Northwest			Corona	Cajalco	I-15	Temescal Canyon	\$0	\$0
Northwest			Corona	Cajalco	I-15	interchange	\$0	\$0
Northwest			Corona	Foothill	Paseo Grande	Lincoln	\$0	\$0
Northwest			Corona	Foothill	Wardlow Wash	bridge	\$0	\$0
Northwest			Corona	Foothill	Lincoln	California	\$0	\$0
Northwest			Corona	Foothill	California	I-15	\$0	\$0
Northwest			Corona	Green River	SR-91	Dominguez Ranch	\$0	\$0
Northwest			Corona	Green River	Dominguez Ranch	Palisades	\$0	\$0
Northwest			Corona	Green River	Palisades	Paseo Grande	\$0	\$0
Northwest			Eastvale	Schleisman	San Bernardino County	600' e/o Cucamonga Creek	\$648,000	\$648,000
Northwest			Eastvale	Schleisman	Cucamonga Creek	bridge	\$0	\$0
Northwest			Eastvale	Schleisman	600' e/o Cucamonga Creek	Harrison	\$866,000	\$866,000
Northwest			Eastvale	Schleisman	Harrison	Sumner	\$488,000	\$488,000
Northwest			Eastvale	Schleisman	Sumner	Scholar	\$7,625,000	\$7,625,000
Northwest			Eastvale	Schleisman	Scholar	A Street	\$2,364,000	\$2,364,000
Northwest			Eastvale	Schleisman	A Street	Hammer	\$4,167,000	\$4,167,000

Table 4.4 - TUMF Network Cost Estimates (continued)

AREA	PLAN	DIST	CITY	STREETNAME	SEGMENTFROM	SEGMENTTO	TOTAL COST	MAXIMUM TUMF SHARE
Northwest	Jurupa Valley	Van Buren			SR-60	Bellegrave	\$23,928,000	\$10,461,000
Northwest	Jurupa Valley	Van Buren			Bellegrave	Santa Ana River	\$60,900,000	\$0
Northwest	Riverside	Alessandro			Arlington	Trautwein	\$2,410,000	\$2,410,000
Northwest	Riverside	Arlington			La Sierra	Magnolia	\$0	\$0
Northwest	Riverside	Arlington			Magnolia	Alessandro	\$46,465,000	\$46,465,000
Northwest	Riverside	Van Buren			Santa Ana River	SR-91	\$5,230,000	\$4,392,000
Northwest	Riverside	Van Buren			SR-91	Mockingbird Canyon	\$39,493,000	\$21,292,000
Northwest	Riverside	Van Buren			Wood	Trautwein	\$0	\$0
Northwest	Riverside	Van Buren			Trautwein	Orange Terrace	\$7,574,000	\$7,574,000
Northwest	Unincorporated	Alessandro			Trautwein	Vista Grande	\$0	\$0
Northwest	Unincorporated	Alessandro			Vista Grande	I-215	\$0	\$0
Northwest	Unincorporated	Cajalco			El Sobrante	Harley John	\$10,580,000	\$9,817,000
Northwest	Unincorporated	Cajalco			Harvil	Harvil	\$166,492,000	\$166,492,000
Northwest	Unincorporated	Cajalco			I-215	I-215	\$1,238,000	\$1,238,000
Northwest	Unincorporated	Cajalco			Temescal Canyon	La Sierra	\$49,596,000	\$35,953,000
Northwest	Unincorporated	Cajalco			Temescal Wash	bridge	\$4,872,000	\$1,907,000
Northwest	Unincorporated	Cajalco			La Sierra	El Sobrante	\$96,453,000	\$96,453,000
Northwest	Unincorporated	Van Buren			Mockingbird Canyon	Wood	\$67,429,000	\$67,429,000
Northwest	Unincorporated	Van Buren			Orange Terrace	I-215	\$0	\$0
Pass	Banning	Highland Springs			Wilson (8th)	Sun Lakes	\$0	\$0
Pass	Banning	Highland Springs			I-10	interchange	\$63,061,000	\$32,516,000
Pass	Banning	Highland Springs			Oak Valley (14th)	Wilson (8th)	\$0	\$0
Pass	Banning	Highland Springs			Cherry Valley	Oak Valley (14th)	\$0	\$0
Pass	Banning	I-10 Bypass South			I-10	Morongo Trail (Apache Trail)	\$50,110,000	\$50,110,000
Pass	Banning	I-10 Bypass South			I-10	interchange	\$63,061,000	\$63,061,000
Pass	Banning	I-10 Bypass South			San Gorgonio	bridge	\$4,176,000	\$4,176,000
Pass	Banning	I-10 Bypass South			UP/Hargrave	railroad crossing	\$52,780,000	\$52,780,000
Pass	Beaumont	Beaumont			Oak Valley (14th)	I-10	\$0	\$0
Pass	Beaumont	Potrero			Oak Valley (San Timoteo Cany	SR-60	\$1,100,000	\$1,100,000
Pass	Beaumont	Potrero			SR-60	interchange	\$63,061,000	\$29,561,000
Pass	Beaumont	Potrero			UP	railroad crossing	\$40,020,000	\$40,020,000
Pass	Beaumont	Potrero			Noble Creek	bridge	\$0	\$0
Pass	Beaumont	Potrero			SR-60	4th	\$0	\$0
Pass	Beaumont	SR-79 (Beaumont)			I-10	California	\$0	\$0
Pass	Beaumont	SR-79 (Beaumont)			I-10	interchange	\$63,061,000	\$7,408,000
Pass	Calimesa	Cherry Valley			I-10	interchange	\$63,061,000	\$59,773,000
Pass	Calimesa	Cherry Valley			Roberts St	Roberts Rd	\$3,053,000	\$3,053,000
Pass	Unincorporated	Cherry Valley			Bellflower	Noble	\$6,411,000	\$6,411,000
Pass	Unincorporated	Cherry Valley			Highland Springs	Bellflower	\$0	\$0
Pass	Unincorporated	Cherry Valley			Noble	Roberts St	\$0	\$0
Pass	Unincorporated	Cherry Valley			San Timoteo Wash	bridge	\$0	\$0
Pass	Unincorporated	SR-79 (Lamb Canyon)			California	Gilman Springs	\$0	\$0
San Jacinto	Hemet	Domenigoni			Warren	Sanderson	\$7,726,000	\$7,726,000
San Jacinto	Hemet	Domenigoni			Sanderson	State	\$0	\$0
San Jacinto	Hemet	SR-74			Winchester	Warren	\$35,208,000	\$35,208,000
San Jacinto	San Jacinto	Mid-County (Ramona)			Warren	Sanderson	\$0	\$0
San Jacinto	San Jacinto	Mid-County (Ramona)			Sanderson/SR-79 (Hemet Bypa	interchange	\$0	\$0
San Jacinto	San Jacinto	Ramona			Sanderson	State	\$0	\$0
San Jacinto	San Jacinto	Ramona			State	Main	\$0	\$0
San Jacinto	San Jacinto	Ramona			Main	Cedar	\$31,518,000	\$26,928,000
San Jacinto	San Jacinto	Ramona			Cedar	SR-74	\$0	\$0
San Jacinto	Unincorporated	Domenigoni			SR-79 (Winchester)	Warren	\$13,508,000	\$13,508,000
San Jacinto	Unincorporated	Domenigoni			San Diego Aqueduct	bridge	\$4,176,000	\$4,176,000
San Jacinto	Unincorporated	Gilman Springs			Bridge	Sanderson	\$0	\$0
San Jacinto	Unincorporated	Mid-County (Ramona)			Bridge	Warren	\$9,221,000	\$9,221,000
San Jacinto	Unincorporated	SR-74			Briggs	SR-79 (Winchester)	\$15,417,000	\$15,417,000
San Jacinto	Unincorporated	SR-79 (Hemet Bypass)			SR-74 (Florida)	Domenigoni	\$13,901,000	\$13,901,000
San Jacinto	Unincorporated	SR-79 (Hemet Bypass)			San Diego Aqueduct	bridge	\$4,176,000	\$4,176,000
San Jacinto	Unincorporated	SR-79 (Hemet Bypass)			Domenigoni	Winchester	\$6,542,000	\$6,542,000
San Jacinto	Unincorporated	SR-79 (San Jacinto Bypass)			Mid-County (Ramona)	SR-74 (Florida)	\$56,690,000	\$56,690,000
San Jacinto	Unincorporated	SR-79 (Sanderson)			Gilman Springs	Ramona	\$6,899,000	\$2,555,000
San Jacinto	Unincorporated	SR-79 (Sanderson)			San Jacinto River	bridge	\$19,488,000	\$7,651,000
San Jacinto	Unincorporated	SR-79 (Winchester)			Domenigoni	Keller	\$0	\$0

Table 4.4 - TUMF Network Cost Estimates (continued)

AREA	PLAN	DIST	CITY	STREETNAME	SEGMENTFROM	SEGMENTTO	TOTAL COST	MAXIMUM TUMF SHARE
Southwest			Canyon Lake	Goetz	Railroad Canyon	Newport	\$0	\$0
Southwest			Canyon Lake	Railroad Canyon	Canyon Hills	Goetz	\$0	\$0
Southwest			Lake Elsinore	Railroad Canyon	I-15	Canyon Hills	\$0	\$0
Southwest			Lake Elsinore	Railroad Canyon	I-15	interchange	\$0	\$0
Southwest			Lake Elsinore	SR-74	I-15	interchange	\$63,061,000	\$24,162,000
Southwest			Murrieta	Clinton Keith	Copper Craft	Toulon	\$0	\$0
Southwest			Murrieta	Clinton Keith	Toulon	I-215	\$2,076,000	\$2,076,000
Southwest			Murrieta	Clinton Keith	I-215	Whitewood	\$0	\$0
Southwest			Murrieta	French Valley (Date)	Murrieta Hot Springs	Winchester Creek	\$7,321,000	\$7,321,000
Southwest			Murrieta	French Valley (Date)	Winchester Creek	Margarita	\$0	\$0
Southwest			Murrieta	Whitewood	Menifee City Limit	Keller	\$0	\$0
Southwest			Murrieta	Whitewood	Keller	Clinton Keith	\$0	\$0
Southwest			Temecula	French Valley (Cherry)	Jefferson	Diaz	\$3,929,000	\$3,929,000
Southwest			Temecula	French Valley (Cherry)	Murrieta Creek	bridge	\$5,846,000	\$5,846,000
Southwest			Temecula	French Valley (Date)	Margarita	Ynez	\$0	\$0
Southwest			Temecula	French Valley (Date)	Ynez	Jefferson	\$5,010,000	\$5,010,000
Southwest			Temecula	French Valley (Date)	I-15	interchange	\$122,076,000	\$122,076,000
Southwest			Temecula	SR-79 (Winchester)	Murrieta Hot Springs	Jefferson	\$2,697,000	\$2,697,000
Southwest			Temecula	SR-79 (Winchester)	I-15	interchange	\$0	\$0
Southwest			Temecula	Western Bypass (Diaz)	Cherry	Rancho California	\$2,285,000	\$2,285,000
Southwest			Temecula	Western Bypass (Vincent Moro)	Rancho California	SR-79 (Front)	\$23,629,000	\$23,629,000
Southwest			Temecula	Western Bypass (Vincent Moro)	I-15	interchange	\$0	\$0
Southwest			Temecula	Western Bypass (Vincent Moro)	Murrieta Creek	bridge	\$4,176,000	\$4,176,000
Southwest			Unincorporated	Benton	SR-79	Eastern Bypass	\$0	\$0
Southwest			Unincorporated	Clinton Keith	Whitewood	SR-79	\$5,539,000	\$5,539,000
Southwest			Unincorporated	Clinton Keith	Warm Springs Creek	bridge	\$0	\$0
Southwest			Unincorporated	SR-74	I-15	Ethanac	\$27,699,000	\$26,347,000
Southwest			Unincorporated	SR-79 (Winchester)	Keiler	Thompson	\$34,213,000	\$34,213,000
Southwest			Unincorporated	SR-79 (Winchester)	Thompson	La Alba	\$27,699,000	\$27,699,000
Southwest			Unincorporated	SR-79 (Winchester)	La Alba	Hunter	\$7,854,000	\$3,042,000
Southwest			Unincorporated	SR-79 (Winchester)	Hunter	Murrieta Hot Springs	\$595,000	\$442,000
Southwest			Wildomar	Bundy Canyon	I-15	Monte Vista	\$1,362,000	\$1,362,000
Southwest			Wildomar	Bundy Canyon	Monte Vista	Sunset	\$24,818,000	\$24,818,000
Southwest			Wildomar	Bundy Canyon	I-15	interchange	\$32,698,000	\$24,613,000
Southwest			Wildomar	Clinton Keith	Palomar	I-15	\$0	\$0
Southwest			Wildomar	Clinton Keith	I-15	Copper Craft	\$5,030,000	\$0
Subtotal							\$2,334,940,000	\$1,965,138,000

Table 4.4 - TUMF Network Cost Estimates (continued)

AREA	PLAN	DIST	CITY	STREETNAME	SEGMENTFROM	SEGMENTTO	TOTAL COST	MAXIMUM TUMF SHARE
Central	Menifee			Briggs	Newport	Scott	\$0	\$0
Central	Menifee			Briggs	SR-74 (Pinacate)	Simpson	\$2,991,000	\$2,991,000
Central	Menifee			Briggs	Simpson	Old Newport	\$5,430,000	\$5,430,000
Central	Menifee			Briggs	Salt Creek	bridge	\$8,352,000	\$8,352,000
Central	Menifee			Garbani	I-215	interchange	\$63,061,000	\$42,483,000
Central	Menifee			Goetz	Juanita	Lesser Lane	\$11,378,000	\$11,378,000
Central	Menifee			Goetz	Newport	Juanita	\$0	\$0
Central	Menifee			Holland	Murrieta	Bradley	\$15,708,000	\$15,708,000
Central	Menifee			Holland	Bradley	Haun	\$11,439,000	\$11,439,000
Central	Menifee			Holland	Haun	Antelope	\$9,456,000	\$9,456,000
Central	Menifee			Holland	I-215 overcrossing	bridge	\$9,744,000	\$9,744,000
Central	Menifee			Holland	Antelope	Menifee	\$3,844,000	\$3,844,000
Central	Menifee			McCall	I-215	Aspel	\$5,354,000	\$5,354,000
Central	Menifee			McCall	I-215	interchange	\$0	\$0
Central	Menifee			McCall	Aspel	Menifee	\$2,288,000	\$2,288,000
Central	Menifee			Murrieta	Ethanac	McCall	\$0	\$0
Central	Menifee			Murrieta	Murrieta	Newport	\$7,967,000	\$7,967,000
Central	Menifee			Murrieta	Newport	Bundy Canyon	\$0	\$0
Central	Moreno Valley			Cactus	I-215	Heacock	\$5,617,000	\$5,617,000
Central	Moreno Valley			Cactus	I-215	interchange	\$0	\$0
Central	Moreno Valley			Day	Ironwood	SR-60	\$0	\$0
Central	Moreno Valley			Day	SR-60	interchange	\$0	\$0
Central	Moreno Valley			Day	SR-60	Eucalyptus	\$0	\$0
Central	Moreno Valley			Eucalyptus	I-215	Towngate	\$8,843,000	\$8,843,000
Central	Moreno Valley			Eucalyptus	Towngate	Frederick	\$0	\$0
Central	Moreno Valley			Eucalyptus	Frederick	Heacock	\$0	\$0
Central	Moreno Valley			Eucalyptus	Heacock	Kitching	\$0	\$0
Central	Moreno Valley			Eucalyptus	Kitching	Moreno Beach	\$0	\$0
Central	Moreno Valley			Eucalyptus	Moreno Beach	Theodore	\$0	\$0
Central	Moreno Valley			Frederick	SR-60	Alessandro	\$0	\$0
Central	Moreno Valley			Heacock	Cactus	San Michele	\$0	\$0
Central	Moreno Valley			Heacock	Reche Vista	Cactus	\$0	\$0
Central	Moreno Valley			Heacock	San Michele	Harley Knox	\$0	\$0
Central	Moreno Valley			Ironwood	SR-60	Day	\$0	\$0
Central	Moreno Valley			Ironwood	Day	Heacock	\$0	\$0
Central	Moreno Valley			Lasselle	Alessandro	John F Kennedy	\$0	\$0
Central	Moreno Valley			Lasselle	John F Kennedy	Oleander	\$0	\$0
Central	Moreno Valley			Moreno Beach	Reche Canyon	SR-60	\$18,797,000	\$18,797,000
Central	Moreno Valley			Moreno Beach	SR-60 overcrossing	bridge	\$3,480,000	\$3,028,000
Central	Moreno Valley			Nason	SR-60	Alessandro	\$0	\$0
Central	Moreno Valley			Pigeon Pass	Ironwood	SR-60	\$0	\$0
Central	Moreno Valley			Pigeon Pass/CETAP Corridor	Hidden Springs	Ironwood	\$0	\$0
Central	Moreno Valley			Reche Canyon	Moreno Valley City Limit	Locust	\$0	\$0
Central	Moreno Valley			Redlands	Locust	Alessandro	\$39,789,000	\$39,789,000
Central	Moreno Valley			Redlands	SR-60	interchange	\$0	\$0
Central	Moreno Valley			Theodore	SR-60	Eucalyptus	\$3,966,000	\$3,966,000
Central	Moreno Valley			Theodore	SR-60	interchange	\$0	\$0
Central	Perris			Ellis	Goetz	Evans	\$9,526,000	\$9,526,000
Central	Perris			Evans	Oleander	Ramona	\$0	\$0
Central	Perris			Evans	Ramona	Morgan	\$0	\$0
Central	Perris			Evans	Morgan	Rider	\$0	\$0
Central	Perris			Evans	Rider	Placentia	\$0	\$0
Central	Perris			Evans	Placentia	Nuevo	\$6,492,000	\$6,492,000
Central	Perris			Evans	Nuevo	Ellis	\$17,705,000	\$17,705,000
Central	Perris			Evans	San Jacinto River	bridge	\$11,136,000	\$11,136,000
Central	Perris			Evans	I-215	bridge	\$8,352,000	\$8,352,000
Central	Perris			Goetz	Lesser	Ethanac	\$7,845,000	\$7,845,000
Central	Perris			Harley Knox	I-215	Indian	\$0	\$0
Central	Perris			Harley Knox	I-215	interchange	\$32,698,000	\$28,740,000
Central	Perris			Harley Knox	Indian	Perris	\$0	\$0
Central	Perris			Harley Knox	Perris	Redlands	\$0	\$0
Central	Perris			Nuevo	I-215	Murrieta	\$16,971,000	\$16,971,000
Central	Perris			Nuevo	I-215	interchange	\$32,698,000	\$19,736,000
Central	Perris			Nuevo	Murrieta	Dunlap	\$4,367,000	\$4,367,000
Central	Perris			Nuevo	Perris Valley Storm Channel	bridge	\$0	\$0
Central	Perris			SR-74 (Matthews)	I-215	Ethanac	\$0	\$0
Central	Perris			SR-74 (Matthews)	I-215	interchange	\$32,698,000	\$21,835,000
Central	Unincorporated			Center (Main)	I-215	MT Vernon	\$0	\$0
Central	Unincorporated			Center (Main)	I-215	interchange	\$32,698,000	\$11,912,000
Central	Unincorporated			Center (Main)	BNSF	railroad crossing	\$20,010,000	\$20,010,000
Central	Unincorporated			Ellis	Post	SR-74	\$11,550,000	\$11,550,000
Central	Unincorporated			Mount Vernon/CETAP Corridor	Center	Pigeon Pass	\$2,582,000	\$2,582,000
Central	Unincorporated			Nuevo	Dunlap	Menifee	\$8,737,000	\$2,505,000
Central	Unincorporated			Nuevo	San Jacinto River	bridge	\$5,568,000	\$5,568,000
Central	Unincorporated			Pigeon Pass/CETAP Corridor	Hidden Springs	Mount Vernon	\$8,106,000	\$8,106,000
Central	Unincorporated			Post	Santa Rosa Mine	Ellis	\$0	\$0
Central	Unincorporated			Reche Canyon	Reche Vista	Moreno Valley City Limit	\$0	\$0
Central	Unincorporated			Redlands	San Timoteo Canyon	Locust	\$0	\$0

Table 4.4 - TUMF Network Cost Estimates (continued)

AREA	PLAN	DIST	CITY	STREETNAME	SEGMENTFROM	SEGMENTTO	TOTAL COST	MAXIMUM TUMF SHARE
Northwest			Corona	6th	SR-91	Magnolia	\$0	\$0
Northwest			Corona	Auto Center	Railroad	SR-91	\$0	\$0
Northwest			Corona	Cajalco	Bedford Canyon	I-15	\$0	\$0
Northwest			Corona	Hidden Valley	Norco Hills	McKinley	\$0	\$0
Northwest			Corona	Lincoln	Parkridge	Ontario	\$0	\$0
Northwest			Corona	Magnolia	6th	Sherborn	\$7,054,000	\$6,419,000
Northwest			Corona	Magnolia	Temescal Creek	bridge	\$4,176,000	\$3,580,000
Northwest			Corona	Magnolia	Sherborn	Rimpau	\$0	\$0
Northwest			Corona	Magnolia	Rimpau	Ontario	\$0	\$0
Northwest			Corona	Main	Grand	Ontario	\$0	\$0
Northwest			Corona	Main	Ontario	Foothill	\$0	\$0
Northwest			Corona	Main	Hidden Valley	Parkridge	\$5,314,000	\$4,389,000
Northwest			Corona	Main	Parkridge	SR-91	\$0	\$0
Northwest			Corona	Main	SR-91	S. Grand	\$0	\$0
Northwest			Corona	McKinley	Hidden Valley	Promenade	\$0	\$0
Northwest			Corona	McKinley	Promenade	SR-91	\$0	\$0
Northwest			Corona	McKinley	SR-91	Magnolia	\$0	\$0
Northwest			Corona	McKinley	Arlington Channel	bridge	\$0	\$0
Northwest			Corona	McKinley	BNSF	railroad crossing	\$105,560,000	\$105,560,000
Northwest			Corona	Ontario	I-15	El Cerrito	\$13,451,000	\$13,451,000
Northwest			Corona	Ontario	Lincoln	Buena Vista	\$0	\$0
Northwest			Corona	Ontario	Buena Vista	Main	\$0	\$0
Northwest			Corona	Ontario	Main	Kellogg	\$0	\$0
Northwest			Corona	Ontario	Kellogg	Fullerton	\$0	\$0
Northwest			Corona	Ontario	Fullerton	Rimpau	\$0	\$0
Northwest			Corona	Ontario	Rimpau	I-15	\$0	\$0
Northwest			Corona	Railroad	Auto Club	Buena Vista	\$0	\$0
Northwest			Corona	Railroad	BNSF	railroad crossing	\$40,020,000	\$40,020,000
Northwest			Corona	Railroad	Buena Vista	Main (at Grand)	\$0	\$0
Northwest			Corona	River	Corydon	Main	\$0	\$0
Northwest			Corona	Serfas Club	SR-91	Green River	\$0	\$0
Northwest			Eastvale	Archibald	Remington	River	\$3,382,000	\$3,382,000
Northwest			Eastvale	Hamner	Mission	Bellevue	\$5,279,000	\$5,279,000
Northwest			Eastvale	Hamner	Bellevue	Amberhill	\$199,000	\$199,000
Northwest			Eastvale	Hamner	Amberhill	Limonite	\$2,787,000	\$2,787,000
Northwest			Eastvale	Hamner	Limonite	Schleisman	\$991,000	\$991,000
Northwest			Eastvale	Hamner	Schleisman	Santa Ana River	\$5,533,000	\$3,675,000
Northwest			Eastvale	Hellman	Schleisman	Walters	\$1,594,000	\$1,594,000
Northwest			Eastvale	Hellman	Walters	River	\$21,503,000	\$21,503,000
Northwest			Eastvale	Hellman	Cucamonga Creek	bridge	\$3,828,000	\$3,828,000
Northwest			Eastvale	Limonite	I-15	Eastvale Gateway	\$289,000	\$289,000
Northwest			Eastvale	Limonite	I-15	interchange	\$0	\$0
Northwest			Eastvale	Limonite	Eastvale Gateway	Hamner	\$255,000	\$255,000
Northwest			Eastvale	Hamner	Sumner	Sumner	\$1,094,000	\$1,094,000
Northwest			Eastvale	Limonite	Sumner	Harrison	\$497,000	\$497,000
Northwest			Eastvale	Limonite	Harrison	Archibald	\$0	\$0
Northwest			Eastvale	Limonite	Archibald	Hellman (Keller SBD Co.)	\$4,885,000	\$4,885,000
Northwest			Eastvale	Limonite	Cucamonga Creek	bridge	\$13,920,000	\$0
Northwest			Eastvale	River	Hellman	Archibald	\$5,948,000	\$5,948,000
Northwest			Jurupa Valley	Armstrong	San Bernardino County	Valley	\$6,192,000	\$6,192,000
Northwest			Jurupa Valley	Bellevue	Cantu-Galleano Ranch	Van Buren	\$464,000	\$464,000
Northwest			Jurupa Valley	Cantu-Galleano Ranch	Wineville	Bellevue	\$793,000	\$793,000
Northwest			Jurupa Valley	Etiwanda	Philadelphia	SR-60	\$1,515,000	\$989,000
Northwest			Jurupa Valley	Etiwanda	SR-60	Limonite	\$0	\$0
Northwest			Jurupa Valley	Limonite	I-15	Wineville	\$0	\$0
Northwest			Jurupa Valley	Limonite	Wineville	Etiwanda	\$0	\$0
Northwest			Jurupa Valley	Limonite	Etiwanda	Van Buren	\$2,981,000	\$2,981,000
Northwest			Jurupa Valley	Limonite	Van Buren	Clay	\$0	\$0
Northwest			Jurupa Valley	Limonite	Clay	Riverview	\$0	\$0
Northwest			Jurupa Valley	Market	Rubidoux	Santa Ana River	\$5,181,000	\$0
Northwest			Jurupa Valley	Market	Santa Ana River	bridge	\$13,920,000	\$6,204,000
Northwest			Jurupa Valley	Mission	Milliken	SR-60	\$0	\$0
Northwest			Jurupa Valley	Mission	SR-60	Santa Ana River	\$0	\$0
Northwest			Jurupa Valley	Riverview	Limonite	Mission	\$0	\$0
Northwest			Jurupa Valley	Rubidoux	Pine	Mission	\$0	\$0
Northwest			Jurupa Valley	Rubidoux	SR-60	interchange	\$32,698,000	\$9,051,000
Northwest			Jurupa Valley	Valley	Armstrong	Mission	\$0	\$0
Northwest			Norco	1st	Parkridge	Mountain	\$0	\$0
Northwest			Norco	1st	Mountain	Hamner	\$0	\$0
Northwest			Norco	2nd	River	I-15	\$0	\$0
Northwest			Norco	6th	Hamner	California	\$0	\$0
Northwest			Norco	6th	I-15	interchange	\$32,698,000	\$3,489,000
Northwest			Norco	Arlington	Crestview	Fairhaven	\$4,342,000	\$4,342,000
Northwest			Norco	California	Arlington	6th	\$15,237,000	\$12,525,000
Northwest			Norco	Corydon	River	5th	\$0	\$0
Northwest			Norco	Hamner	Santa Ana River	bridge	\$33,408,000	\$11,455,000
Northwest			Norco	Hamner	Santa Ana River	Hidden Valley	\$49,591,000	\$49,591,000
Northwest			Norco	Hidden Valley	I-15	Norco Hills	\$0	\$0
Northwest			Norco	Hidden Valley	Hamner	I-15	\$0	\$0
Northwest			Norco	Norco	Corydon	Hamner	\$0	\$0
Northwest			Norco	Norco	California	Crestview	\$0	\$0
Northwest			Norco	River	Archibald	Corydon	\$1,743,000	\$1,109,000

Table 4.4 - TUMF Network Cost Estimates (continued)

AREA	PLAN	DIST	CITY	STREETNAME	SEGMENTFROM	SEGMENTTO	TOTAL COST	MAXIMUM TUMF SHARE
Northwest	Riverside			14th	Market	Martin Luther King	\$0	\$0
Northwest	Riverside			1st	Market	Main	\$0	\$0
Northwest	Riverside			3rd	SR-91	I-215	\$1,941,000	\$1,941,000
Northwest	Riverside			3rd	BNSF	railroad crossing	\$105,560,000	\$30,560,000
Northwest	Riverside			Adams	Arlington	SR-91	\$0	\$0
Northwest	Riverside			Adams	SR-91	Lincoln	\$0	\$0
Northwest	Riverside			Adams	SR-91	interchange	\$32,698,000	\$3,262,000
Northwest	Riverside			Arlington	Fairhaven	La Sierra	\$0	\$0
Northwest	Riverside			Buena Vista	Santa Ana River	Redwood	\$0	\$0
Northwest	Riverside			Canyon Crest	Martin Luther King	Central	\$0	\$0
Northwest	Riverside			Canyon Crest	Central	Country Club	\$0	\$0
Northwest	Riverside			Canyon Crest	Country Club	Via Vista	\$4,996,000	\$1,593,000
Northwest	Riverside			Canyon Crest	Via Vista	Alessandro	\$0	\$0
Northwest	Riverside			Central	Chicago	I-215/SR-60	\$0	\$0
Northwest	Riverside			Central	SR-91	Magnolia	\$0	\$0
Northwest	Riverside			Central	Alessandro	SR-91	\$0	\$0
Northwest	Riverside			Central	Van Buren	Magnolia	\$0	\$0
Northwest	Riverside			Chicago	Alessandro	Spruce	\$0	\$0
Northwest	Riverside			Chicago	Spruce	Columbia	\$0	\$0
Northwest	Riverside			Columbia	Main	Iowa	\$0	\$0
Northwest	Riverside			Columbia	I-215	interchange	\$32,698,000	\$9,050,000
Northwest	Riverside			Iowa	Center	3rd	\$30,272,000	\$30,272,000
Northwest	Riverside			Iowa	3rd	University	\$0	\$0
Northwest	Riverside			Iowa	University	Martin Luther King	\$0	\$0
Northwest	Riverside			JFK	Trautwein	Wood	\$1,880,000	\$1,880,000
Northwest	Riverside			La Sierra	Arlington	SR-91	\$0	\$0
Northwest	Riverside			La Sierra	SR-91	Indiana	\$192,000	\$192,000
Northwest	Riverside			La Sierra	Indiana	Victoria	\$778,000	\$778,000
Northwest	Riverside			Lemon (NB One way)	Mission Inn	University	\$0	\$0
Northwest	Riverside			Lincoln	Van Buren	Jefferson	\$0	\$0
Northwest	Riverside			Lincoln	Jefferson	Washington	\$0	\$0
Northwest	Riverside			Lincoln	Washington	Victoria	\$0	\$0
Northwest	Riverside			Madison	SR-91	Victoria	\$853,000	\$853,000
Northwest	Riverside			Madison	BNSF	railroad crossing	\$20,010,000	\$20,010,000
Northwest	Riverside			Magnolia	BNSF Railroad	Tyler	\$0	\$0
Northwest	Riverside			Magnolia	BNSF	railroad crossing	\$0	\$0
Northwest	Riverside			Magnolia	Tyler	Harrison	\$0	\$0
Northwest	Riverside			Magnolia	Harrison	14th	\$0	\$0
Northwest	Riverside			Main	1st	San Bernardino County	\$0	\$0
Northwest	Riverside			Market	14th	Santa Ana River	\$9,491,000	\$9,491,000
Northwest	Riverside			Martin Luther King	14th	I-215/SR-60	\$24,031,000	\$24,031,000
Northwest	Riverside			Mission Inn	Redwood	Lemon	\$0	\$0
Northwest	Riverside			Redwood (S3 One way)	Mission Inn	University	\$0	\$0
Northwest	Riverside			Trautwein	Alessandro	Van Buren	\$0	\$0
Northwest	Riverside			Tyler	SR-91	Magnolia	\$0	\$0
Northwest	Riverside			Tyler	SR-91	interchange	\$63,061,000	\$21,814,000
Northwest	Riverside			Tyler	Magnolia	Hole	\$0	\$0
Northwest	Riverside			Tyler	Hole	Wells	\$0	\$0
Northwest	Riverside			Tyler	Wells	Arlington	\$0	\$0
Northwest	Riverside			University	Redwood	SR-91	\$859,000	\$859,000
Northwest	Riverside			University	SR-91	I-215/SR-60	\$2,067,000	\$2,067,000
Northwest	Riverside			Victoria	Lincoln	Arlington	\$0	\$0
Northwest	Riverside			Victoria	Madison	Washington	\$0	\$0
Northwest	Riverside			Washington	Victoria	Hermosa	\$27,018,000	\$27,018,000
Northwest	Riverside			Wood	JFK	Van Buren	\$3,053,000	\$3,053,000
Northwest	Riverside			Wood	Van Buren	Bergamont	\$0	\$0
Northwest	Riverside			Wood	Bergamont	Krameria	\$0	\$0
Northwest	Unincorporated			Cantu-Galleano Ranch	Hamner	Wineville	\$0	\$0
Northwest	Unincorporated			Dos Lagos (Weirick)	Temescal Canyon	I-15	\$0	\$0
Northwest	Unincorporated			El Cerrito	I-15	Ontario	\$0	\$0
Northwest	Unincorporated			El Sobrante	Mockingbird Canyon	Cajalco	\$0	\$0
Northwest	Unincorporated			Harley John	Washington	Scottsdale	\$0	\$0
Northwest	Unincorporated			Harley John	Scottsdale	Cajalco	\$0	\$0
Northwest	Unincorporated			La Sierra	Victoria	El Sobrante	\$0	\$0
Northwest	Unincorporated			La Sierra	El Sobrante	Cajalco	\$0	\$0
Northwest	Unincorporated			Mockingbird Canyon	Van Buren	El Sobrante	\$20,871,000	\$20,871,000
Northwest	Unincorporated			Temescal Canyon	El Cerrito	Tuscany	\$3,168,000	\$0
Northwest	Unincorporated			Temescal Canyon	Tuscany	Dos Lagos	\$0	\$0
Northwest	Unincorporated			Temescal Canyon	Dos Lagos	Leroy	\$0	\$0
Northwest	Unincorporated			Temescal Canyon	Leroy	Dawson Canyon	\$0	\$0
Northwest	Unincorporated			Temescal Canyon	Dawson Canyon	I-15	\$0	\$0
Northwest	Unincorporated			Temescal Canyon	I-15	interchange	\$32,698,000	\$32,698,000
Northwest	Unincorporated			Temescal Canyon	I-15	Park Canyon	\$14,329,000	\$14,329,000
Northwest	Unincorporated			Temescal Canyon	Park Canyon	Indian Truck Trail	\$0	\$0
Northwest	Unincorporated			Washington	Hermosa	Harley John	\$12,787,000	\$12,787,000
Northwest	Unincorporated			Wood	Krameria	Cajalco	\$12,537,000	\$12,537,000

Table 4.4 - TUMF Network Cost Estimates (continued)

AREA	PLAN	DIST	CITY	STREETNAME	SEGMENTFROM	SEGMENTTO	TOTAL COST	MAXIMUM TUMF SHARE
Pass	Banning			8th	Wilson	I-10	\$0	\$0
Pass	Banning			Lincoln	Sunset	SR-243	\$0	\$0
Pass	Banning			Ramsey	I-10	8th	\$0	\$0
Pass	Banning			Ramsey	8th	Highland Springs	\$0	\$0
Pass	Banning			SR-243	I-10	Wesley	\$0	\$0
Pass	Banning			Sun Lakes	Highland Home	Sunset	\$30,502,000	\$30,502,000
Pass	Banning			Sun Lakes	Smith Creek	bridge	\$8,352,000	\$8,352,000
Pass	Banning			Sun Lakes	Montgomery Creek	bridge	\$5,568,000	\$5,568,000
Pass	Banning			Sun Lakes	Highland Springs	Highland Home	\$0	\$0
Pass	Banning			Sunset	Ramsey	Lincoln	\$0	\$0
Pass	Banning			Sunset	I-10	interchange	\$32,698,000	\$32,698,000
Pass	Banning			Wilson	Highland Home	8th	\$0	\$0
Pass	Banning			Wilson	Highland Springs	Highland Home	\$0	\$0
Pass	Beaumont			1st	Viele	Pennsylvania	\$0	\$0
Pass	Beaumont			1st	Pennsylvania	Highland Springs	\$0	\$0
Pass	Beaumont			6th	I-10	Highland Springs	\$0	\$0
Pass	Beaumont			Desert Lawn	Champions	Oak Valley (STC)	\$0	\$0
Pass	Beaumont			Oak Valley (14th)	Highland Springs	Pennsylvania	\$0	\$0
Pass	Beaumont			Oak Valley (14th)	Pennsylvania	Oak View	\$0	\$0
Pass	Beaumont			Oak Valley (14th)	Oak View	I-10	\$0	\$0
Pass	Beaumont			Oak Valley (14th)	I-10	interchange	\$63,061,000	\$62,401,000
Pass	Beaumont			Oak Valley (STC)	UP Railroad	Tukwet Canyon	\$0	\$0
Pass	Beaumont			Oak Valley (STC)	Tukwet Canyon	I-10	\$0	\$0
Pass	Beaumont			Pennsylvania	6th	1st	\$6,588,000	\$6,588,000
Pass	Beaumont			Pennsylvania	I-10	interchange	\$0	\$0
Pass	Calimesa			Bryant	County Line	Avenue L	\$0	\$0
Pass	Calimesa			Calimesa	County Line	I-10	\$0	\$0
Pass	Calimesa			Calimesa	I-10	interchange	\$63,061,000	\$63,061,000
Pass	Calimesa			County Line	7th	Bryant	\$0	\$0
Pass	Calimesa			County Line	I-10	interchange	\$32,698,000	\$32,698,000
Pass	Calimesa			Desert Lawn	Palmer	Champions	\$0	\$0
Pass	Calimesa			Singleton	Avenue L	Condit	\$0	\$0
Pass	Calimesa			Singleton	Condit	Roberts	\$12,972,000	\$12,972,000
Pass	Calimesa			Singleton	I-10	interchange	\$63,061,000	\$0
Pass	Calimesa			Tukwet Canyon	Roberts Rd	Palmer	\$0	\$0
Pass	Unincorporated			Live Oak Canyon	Oak Valley (STC)	San Bernardino County	\$0	\$0
Pass	Unincorporated			San Timoteo Canyon	San Bernardino County	UP Railroad	\$0	\$0
Pass	Unincorporated			San Timoteo Canyon	UP Railroad	railroad crossing	\$52,780,000	\$52,780,000
San Jacinto	Hemet			Sanderson	Acacia	Menlo	\$0	\$0
San Jacinto	Hemet			Sanderson	Domenigoni	Stetson	\$0	\$0
San Jacinto	Hemet			Sanderson	RR Crossing	Acacia	\$0	\$0
San Jacinto	Hemet			Sanderson	Stetson	RR Crossing	\$0	\$0
San Jacinto	Hemet			Sanderson	Menlo	Esplanade	\$0	\$0
San Jacinto	Hemet			SR-74 (Florida)	Warren	Cawston	\$0	\$0
San Jacinto	Hemet			SR-74 (Florida)	Columbia	Ramona	\$0	\$0
San Jacinto	Hemet			SR-74/SR-79 (Florida)	Cawston	Columbia	\$0	\$0
San Jacinto	Hemet			State	Domenigoni	Chambers	\$0	\$0
San Jacinto	Hemet			State	Chambers	Stetson	\$0	\$0
San Jacinto	Hemet			State	Florida	Esplanade	\$0	\$0
San Jacinto	Hemet			State	Stetson	Florida	\$0	\$0
San Jacinto	Hemet			Stetson	Cawston	State	\$0	\$0
San Jacinto	Hemet			Stetson	Warren	Cawston	\$4,357,000	\$4,357,000
San Jacinto	Hemet			Warren	Esplanade	Domenigoni	\$19,926,000	\$19,926,000
San Jacinto	Hemet			Warren	Salt Creek	bridge	\$4,176,000	\$4,176,000
San Jacinto	San Jacinto			Esplanade	Mountain	State	\$0	\$0
San Jacinto	San Jacinto			Esplanade	State	Warren	\$0	\$0
San Jacinto	San Jacinto			Sanderson	Ramona	Esplanade	\$0	\$0
San Jacinto	San Jacinto			SR-79 (North Ramona)	State	San Jacinto	\$0	\$0
San Jacinto	San Jacinto			SR-79 (San Jacinto)	North Ramona Blvd	7th	\$0	\$0
San Jacinto	San Jacinto			SR-79 (San Jacinto)	7th	SR-74	\$0	\$0
San Jacinto	San Jacinto			State	Ramona	Esplanade	\$0	\$0
San Jacinto	San Jacinto			State	Gilman Springs	Quandt Ranch	\$3,317,000	\$3,317,000
San Jacinto	San Jacinto			State	San Jacinto River	bridge	\$0	\$0
San Jacinto	San Jacinto			State	Quandt Ranch	Ramona	\$0	\$0
San Jacinto	San Jacinto			Warren	Ramona	Esplanade	\$13,469,000	\$13,469,000
San Jacinto	Unincorporated			Gilman Springs	Sanderson	State	\$11,097,000	\$11,097,000
San Jacinto	Unincorporated			Gilman Springs	Massacre Canyon Wash	bridge	\$1,392,000	\$1,392,000
San Jacinto	Unincorporated			SR-79 (Winchester)	SR-74 (Florida)	Domenigoni	\$0	\$0

Table 4.4 - TUMF Network Cost Estimates (continued)

AREA	PLAN	DIST	CITY	STREETNAME	SEGMENTFROM	SEGMENTTO	TOTAL COST	MAXIMUM TUMF SHARE
Southwest			Lake Elsinore	Corydon	Mission	Grand	\$3,336,000	\$3,336,000
Southwest			Lake Elsinore	Diamond	Mission	I-15	\$0	\$0
Southwest			Lake Elsinore	Franklin (Integral to Railroad C	I-15	interchange	\$0	\$0
Southwest			Lake Elsinore	Grand	Lincoln	Toft	\$0	\$0
Southwest			Lake Elsinore	Grand	Toft	SR-74 (Riverside)	\$3,512,000	\$3,512,000
Southwest			Lake Elsinore	Lake	I-15	Lincoln	\$39,817,000	\$32,726,000
Southwest			Lake Elsinore	Lake	I-15	interchange	\$32,698,000	\$15,771,000
Southwest			Lake Elsinore	Lake	Temescal Wash	bridge	\$2,506,000	\$1,150,000
Southwest			Lake Elsinore	Mission	Railroad Canyon	Bundy Canyon	\$0	\$0
Southwest			Lake Elsinore	Nichols	I-15	Lake	\$7,850,000	\$7,850,000
Southwest			Lake Elsinore	Nichols	Temescal Wash	bridge	\$0	\$0
Southwest			Lake Elsinore	Nichols	I-15	interchange	\$63,061,000	\$63,061,000
Southwest			Lake Elsinore	SR-74 (Collier/Riverside)	I-15	Lakeshore	\$24,303,000	\$24,303,000
Southwest			Lake Elsinore	SR-74 (Grand)	Riverside	SR-74 (Ortega)	\$9,733,000	\$3,691,000
Southwest			Lake Elsinore	SR-74 (Riverside)	Lakeshore	Grand	\$20,175,000	\$20,175,000
Southwest			Lake Elsinore	Temescal Canyon	I-15	Lake	\$7,411,000	\$7,411,000
Southwest			Lake Elsinore	Temescal Canyon	Temescal Wash	bridge	\$3,480,000	\$3,480,000
Southwest			Murrieta	California Oaks	Jefferson	I-15	\$0	\$0
Southwest			Murrieta	California Oaks	I-15	Jackson	\$0	\$0
Southwest			Murrieta	California Oaks	Jackson	Clinton Keith	\$0	\$0
Southwest			Murrieta	Jackson	Whitewood	Ynez	\$0	\$0
Southwest			Murrieta	Jefferson	Palomar	Nutmeg	\$1,562,000	\$1,562,000
Southwest			Murrieta	Jefferson	Nutmeg	Murrieta Hot Springs	\$0	\$0
Southwest			Murrieta	Jefferson	Murrieta Hot Springs	Cherry	\$30,634,000	\$30,634,000
Southwest			Murrieta	Keller	I-215	Whitewood	\$0	\$0
Southwest			Murrieta	Keller	I-215	interchange	\$0	\$0
Southwest			Murrieta	Los Alamos	Jefferson	I-215	\$0	\$0
Southwest			Murrieta	Murrieta Hot Springs	Jefferson	I-215	\$0	\$0
Southwest			Murrieta	Murrieta Hot Springs	I-215	Margarita	\$0	\$0
Southwest			Murrieta	Murrieta Hot Springs	Margarita	SR-79 (Winchester)	\$4,057,000	\$3,899,000
Southwest			Murrieta	Nutmeg	Jefferson	Clinton Keith	\$0	\$0
Southwest			Murrieta	Whitewood	Clinton Keith	Los Alamos	\$2,708,000	\$2,708,000
Southwest			Murrieta	Whitewood	Los Alamos	Murrieta Hot Springs	\$0	\$0
Southwest			Murrieta	Whitewood	Murrieta Hot Springs	Jackson	\$4,629,000	\$4,629,000
Southwest			Murrieta	Ynez	Jackson	SR-79 (Winchester)	\$0	\$0
Southwest			Temecula	Butterfield Stage	Murrieta Hot Springs	Calle Chapos	\$816,000	\$816,000
Southwest			Temecula	Butterfield Stage	Calle Chapos	La Serena	\$696,000	\$696,000
Southwest			Temecula	Butterfield Stage	La Serena	Rancho California	\$904,000	\$904,000
Southwest			Temecula	Butterfield Stage	Rancho California	Pauba	\$846,000	\$846,000
Southwest			Temecula	Butterfield Stage	Pauba	SR-79 (Temecula Pkwy)	\$725,000	\$725,000
Southwest			Temecula	Jefferson	Cherry	Rancho California	\$2,285,000	\$2,285,000
Southwest			Temecula	Margarita	Murrieta Hot Springs	SR-79 (Temecula Pkwy)	\$7,644,000	\$7,644,000
Southwest			Temecula	Old Town Front	Rancho California	I-15/SR-79 (Temecula Pkwy)	\$0	\$0
Southwest			Temecula	Pechanga Pkwy	SR-79 (Temecula Pkwy)	Via Gilberto	\$0	\$0
Southwest			Temecula	Pechanga Pkwy	Via Gilberto	Pechanga Pkwy	\$0	\$0
Southwest			Temecula	Rancho California	Jefferson	Margarita	\$18,254,000	\$18,181,000
Southwest			Temecula	Rancho California	I-15	interchange	\$32,698,000	\$0
Southwest			Temecula	Rancho California	Margarita	Butterfield Stage	\$0	\$0
Southwest			Temecula	SR-79 (Temecula Pkwy)	I-15	Pechanga Pkwy	\$0	\$0
Southwest			Temecula	SR-79 (Temecula Pkwy)	Pechanga Pkwy	Butterfield Stage	\$3,065,000	\$3,065,000
Southwest			Unincorporated	Briggs	Scott	SR-79 (Winchester)	\$6,509,000	\$6,509,000
Southwest			Unincorporated	Butterfield Stage	Tucalota Creek	bridge	\$0	\$0
Southwest			Unincorporated	Butterfield Stage (Pourroy)	Auld	Murrieta Hot Springs	\$23,076,000	\$23,076,000
Southwest			Unincorporated	Grand	Ortega	Corydon	\$68,025,000	\$68,025,000
Southwest			Unincorporated	Horsethief Canyon	Temescal Canyon	I-15	\$0	\$0
Southwest			Unincorporated	Indian Truck Trail	Temescal Canyon	I-15	\$0	\$0
Southwest			Unincorporated	Murrieta Hot Springs	SR-79 (Winchester)	Pourroy	\$0	\$0
Southwest			Unincorporated	Pala	Pechanga	San Diego County	\$0	\$0
Southwest			Unincorporated	Pourroy	SR-79 (Winchester)	Auld	\$2,236,000	\$2,236,000
Southwest			Unincorporated	Rancho California	Butterfield Stage	Glen Oaks	\$87,369,000	\$87,369,000
Southwest			Unincorporated	Temescal Canyon	Horsethief Canyon Wash	bridge	\$3,340,000	\$3,340,000
Southwest			Unincorporated	Temescal Canyon	Indian Truck Trail	I-15	\$15,739,000	\$15,739,000
Southwest			Unincorporated	Temescal Canyon	Indian Wash	bridge	\$1,462,000	\$1,462,000
Southwest			Wildomar	Bundy Canyon	Mission	I-15	\$9,704,000	\$9,704,000
Southwest			Wildomar	Grand	Corydon	Wildomar Trail	\$0	\$0
Southwest			Wildomar	Mission	Bundy Canyon	Palomar	\$0	\$0
Southwest			Wildomar	Palomar	Clinton Keith	Washington	\$3,227,000	\$3,227,000
Southwest			Wildomar	Palomar	Mission	Clinton Keith	\$13,493,000	\$13,493,000
Southwest			Wildomar	Wildomar Trail	I-15	Baxter	\$1,281,000	\$1,281,000
Southwest			Wildomar	Wildomar Trail	I-15	interchange	\$32,698,000	\$27,858,000
Southwest			Wildomar	Wildomar Trail	Baxter	Palomar	\$11,316,000	\$11,316,000
Southwest			Wildomar	Wildomar Trail	Palomar	Grand	\$0	\$0
Subtotal							\$2,451,368,000	\$1,957,217,000
Totals								
Network							\$ 4,784,308,000	\$ 3,922,355,000
Transit							\$ 217,870,000	\$ 154,831,000
Administration							\$ 163,087,440	\$ 163,087,440
MSHCP							\$ 64,329,000	\$ 57,217,000
TOTAL							\$ 5,231,594,440	\$ 4,297,490,440

Table 4.5 – TUMF Transit Cost Estimates

AREA PLAN DIST	LEAD AGENCY	PROJECT NAME	LOCATION	TOTAL	MAXIMUM TUMF SHARE
Central	RTA	Menifee Mobility Hub	Menifee	\$7,465,000	\$5,305,000
Northwest	RTA	Riverside Mobility Hub at Vine Street	Riverside	\$11,195,000	\$7,956,000
Central	RTA	Moreno Valley Mobility Hub(s)	Moreno Valley	\$11,195,000	\$7,956,000
Northwest	RTA	Jurupa Valley Mobility Hub(s)	Jurupa Valley	\$11,195,000	\$7,956,000
Pass	RTA	Pass Area Mobility Hub(s)	Banning	\$11,195,000	\$7,956,000
Southwest	RTA	Lake Elsinore / Canyon Lake Mobility Hub(s)	Lake Elsinore	\$11,195,000	\$7,956,000
San Jacinto	RTA	Hemet Mobility Hub	Hemet	\$11,195,000	\$7,956,000
San Jacinto	RTA	San Jacinto Mobility Hub	San Jacinto	\$11,195,000	\$7,956,000
San Jacinto	RTA	MSJC Mobility Hub	San Jacinto	\$1,245,000	\$885,000
Regional	RTA	ZEB Technology Enhancements	Various locations region wide	\$1,000,000	\$711,000
Northwest	RTA	Regional Operations and Maintenance Facility	Riverside	\$62,186,000	\$44,192,000
Regional	RTA	Annual Transit Enhancements Program	Various locations region wide	\$14,500,000	\$10,304,000
Northwest	RTA	HQTC Improvements	UCR, Riverside to Perris	\$3,150,000	\$2,239,000
Regional	RTA	Vehicle Fleet Small Buses/Vans	Various locations region wide	\$4,800,000	\$3,411,000
Regional	RTA	Vehicle Fleet Medium Buses	Various locations region wide	\$6,000,000	\$4,264,000
Regional	RTA	Vehicle Fleet Large Buses	Various locations region wide	\$36,859,000	\$26,194,000
Regional	RTA	COA Study	Various locations region wide	\$2,300,000	\$1,634,000
TOTAL				\$217,870,000	\$154,831,000

4.8 TUMF Network Evaluation

To assess the effectiveness of the proposed TUMF Network improvements to mitigate the cumulative regional impact of new development in Western Riverside County, the proposed network improvements were added to the 2021 existing network in RivCoM and the model was run with 2045 socioeconomic data to determine the relative impacts on horizon year traffic conditions. To quantify the impacts of the TUMF Network improvements, the various traffic measures of effectiveness described in **Section 3.1** for the 2018 Existing and 2045 No-Build scenarios were again calculated for the 2045 TUMF Build scenario. The results for VMT, VHT, VHD, and total VMT experiencing unacceptable level of service (LOS E) were then compared to the results presented in **Table 3.1** for the no-build conditions. The 2045 TUMF Build comparison results are provided in **Table 4.6**. Plots of the Network Extents are attached in **Appendix H**.

As shown in **Table 4.6**, the 2045 peak period VMT on all arterial facilities experiencing LOS of E or worse will decrease with the addition of the TUMF Network improvements while the share of VMT on the TUMF arterial network experiencing LOS E or worse during the peak periods will be reduced to 32% (which is still above the level experienced in 2018). It should be noted that the total VMT on the arterial system **increases** as a result of freeway trips being diverted to the arterial system to benefit from the proposed TUMF improvements.

Despite a greater share of the total peak period VMT in 2045, the arterial system can more efficiently accommodate the increased demand with the proposed TUMF improvements. Although peak period VMT on the TUMF improved arterial system increases by approximately 6% in 2045 compared to the No Build condition, VHT on the arterial system remains almost constant. Additionally, a benefit is observed on the freeway system with VMT and VHT being reduced following TUMF Network improvements. By completing TUMF improvements, the total VHD experienced by all area motorists would be reduced during the peak period by over 7% from the levels that would be experienced under the 2045 No-Build scenario. These results highlight the

effectiveness of the TUMF Program to mitigate the cumulative regional transportation impacts of new development commensurate with the level of impact being created.

**Table 4.6 – Regional Highway System Measures of Performance
(2018 Existing and 2045 No-Build Scenarios to 2045 TUMF Build Scenario)**

Measure of Performance*	Peak Periods (Total)		
	2018 Existing	2045 No-Build	2045 Build
VMT - Total ALL FACILITIES	23,284,724	29,897,254	30,160,328
VMT - FREEWAYS	13,514,522	15,490,284	15,418,548
VMT - ALL ARTERIALS	9,770,202	14,406,970	14,741,781
TOTAL - TUMF ARTERIAL VMT	6,216,985	8,597,200	9,096,417
VHT - TOTAL ALL FACILITIES	541,350	915,439	895,725
VHT - FREEWAYS	263,792	399,128	388,847
VHT - ALL ARTERIALS	277,558	516,311	506,878
TOTAL TUMF ARTERIAL VHT	174,455	320,869	321,062
VHD - TOTAL ALL FACILITIES	108,900	338,056	313,288
VHD - FREEWAYS	66,156	170,649	161,528
VHD - ALL ARTERIALS	42,745	167,407	151,760
TOTAL TUMF ARTERIAL VHD	33,249	124,863	114,451
VMT LOS E - TOTAL ALL FACILITIES	5,605,070	13,369,483	12,788,016
VMT LOS E - FREEWAYS	4,725,471	9,316,891	9,115,937
VMT LOS E & F - ALL ARTERIALS	879,599	4,052,592	3,672,079
TOTAL TUMF ARTERIAL VMT w/ LOS E or worse	765,782	3,184,133	2,929,288
% of TUMF ARTERIAL VMT w/ LOS E or worse	12%	37%	32%

* Source: RivCoM 2018 base network and SCAG 2020 RTP/SCS SED with updated 2021 arterial network as existing in December 2021 and RivCoM 2018 base network and SCAG 2020 RTP/SCS SED with updated 2021 arterial network plus future TUMF network projects.

NOTES:

Volume is adjusted by PCE factor

VMT = vehicle miles of travel (the total combined distance that all vehicles travel on the system)

VHT = vehicle hours of travel (the total combined time that all vehicles are traveling on the system)

VHD = vehicle hours of delay (the total combined time that all vehicles have been delayed on the system based on the difference between forecast travel time and free-flow (ideal) travel time)

LOS = level of service (based on forecast volume to capacity ratios).

LOS E or Worse was determined by V/C ratio that exceeds 0.9 thresholds as indicated in the Riverside County General Plan.

5.0 TUMF NEXUS ANALYSIS

The objective of this section is to evaluate and document the rational nexus (or reasonable relationship) between the proposed fee and the transportation system improvements it will be used to help fund. The analysis starts by documenting the correlation between future development and the need for transportation system improvements on the TUMF network to mitigate the cumulative regional impacts of this new development, followed by analysis of the nexus evaluation of the key components of the TUMF concept.

5.1 Future Development and the Need for Improvements

Previous sections of this report documented the projected population, household and employment growth in Western Riverside County, the expected increases in traffic congestion and travel delay, and the identification of the transportation system improvements that will serve these future inter-community travel demands. The following points coalesce this information in a synopsis of how the future growth relates to the need for improvements to the TUMF system.

- Western Riverside County is expected to continue growing.
Development in Western Riverside County is expected to continue at a robust rate of growth into the foreseeable future. Current projections estimate the population is projected to grow from a level of approximately 1.91 million in 2018 to a future level of about 2.53 million in 2045, while employment is projected to grow from a level of about 570,000 in 2018 to approximately 846,000 in 2045 (as shown in **Table 2.3**).
- Continuing growth will result in increasing congestion on arterial roadways.
Traffic congestion and delay on arterial roadways are projected to increase dramatically in the future (as shown in **Table 3.1**). Without improvements to the transportation system, congestion levels will grow rapidly and travelers will experience unacceptable travel conditions with slow travel speeds and lengthy delays.
- The future arterial roadway congestion is directly attributable to future development in Western Riverside County.
Traffic using arterial roadways within Western Riverside County is virtually all generated within or attracted to Western Riverside County, since longer-distance trips passing through the region typically use the freeway system, not arterial roadways. Therefore, the future recurring congestion problems on these roadways will be attributable to new trips that originate in, terminate in, or travel within Western Riverside County.
- Capacity improvements to the transportation system will be needed to alleviate the future congestion caused by new development.
To maintain transportation service closer to current levels of efficiency, capacity enhancements will need to be made to the arterial roadway system. These enhancements could include new or realigned roads, additional lanes on existing

roads, new or expanded bridges, new or upgraded freeway interchanges, grade separation of at-grade rail crossings, or the installation of new ITS to improve traffic flows. The completion of improvements to the arterial roadway system would enhance regional mobility and reduce the total peak period vehicles hours of travel (VHT) by over 2%, reduce peak period vehicle hours of delay (VHD) by over 7%, and reduce the share of traffic experiencing congestion in the peak periods by over 4% (as shown in **Table 4.6**). The specific needs and timing of implementation will depend on the location and rate of future development, so the specific improvements to be funded by the TUMF and their priority of implementation will be determined during future project programming activities as improvement needs unfold and as TUMF funds become available.

- Roads on the TUMF network are the facilities that merit improvement through this fee program.

The criteria used to identify roads for the TUMF network (future number of lanes, future traffic volume, future congestion level, and roadway function linking communities and activity centers and serving public transportation) were selected to ensure that these are the roadways that will serve inter-community travel and will require future improvement to alleviate congestion.

- Improvements to the public transportation system will be needed to provide adequate mobility for transit-dependent travelers and to provide an alternative to automobile travel.

Since a portion of the population does not own an automobile and depends on public transportation for mobility, public transportation infrastructure and service will need to be enhanced and expanded to ensure continued mobility for this segment of the population. In addition, improvements to the public transportation system will be required to ensure that transit service can function as a viable option for future new Western Riverside County residents and employees who choose to avoid congestion by using public transportation.

For the reasons cited above, it can be readily concluded that there is a rational nexus between the future need for transportation improvements on the TUMF system and the future development upon which the proposed TUMF would be levied. The following sections evaluate the rational nexus in relation to the system components and the types of uses upon which the fee is assessed.

5.2 Application of Fee to System Components

As noted in **Section 3.2**, the TUMF concept includes splitting the fee revenues between the backbone system of arterials, the secondary system of arterials, and the public transportation system. This section evaluates the travel demands to determine the rational nexus between the future travel demands and the use of the fee to fund improvements to the future system components.

The split of fee revenues between the backbone and secondary highway networks is related to the proportion of highway vehicle trips that are relatively local (between

adjacent communities) and longer distance (between more distant communities but still within Western Riverside County). To estimate a rational fee split between the respective networks, the future combined AM and PM peak period travel forecast estimates were aggregated to a matrix of trips between zones to show the percentage of trips that remain within each zone in relation to the volume that travels to the other zones. This analysis was completed using the Year 2045 No-Build scenario trip tables from RivCoM.

The first step in the analysis was to create a correspondence table between the TAZs in the model and the five WRCOG TUMF zones (i.e. Northwest, Southwest, Central, Hemet/San Jacinto and Pass). The TAZs were then compressed into six districts (the five WRCOG zones and one for the rest of the SCAG region).

Table 5.1 shows the estimated peak period vehicle trips within and between each of the zones. **Table 5.2** shows the percentage of peak period vehicle trips within and between the respective zones. **Appendix I** includes the detailed RivCoM outputs used to develop the regional trip distribution profile shown in **Table 5.1** and **5.2**.

Table 5.1 - 2045 No-Build Peak Period Vehicle Trips by WRCOG Zone

From \ To	Central	Hemet/San Jacinto	Northwest	Pass	Southwest	Outside WRCOG	TOTAL
Central	417,608	23,474	89,780	6,301	55,101	57,558	649,822
Hemet/San Jacinto	29,401	209,005	8,647	8,432	16,081	18,078	289,645
Northwest	58,578	2,684	743,234	2,687	11,032	196,041	1,014,257
Pass	8,068	7,585	6,114	110,385	908	32,334	165,395
Southwest	55,812	16,232	32,852	1,976	667,255	62,713	836,839
Outside WRCOG	33,907	7,574	192,712	24,490	33,867		292,550
TOTAL	603,375	266,554	1,073,340	154,271	784,244	366,724	3,248,507

Based on RivCoM Year 2045 No-Build scenario

Table 5.2 – 2045 No-Build Percent Peak Period Vehicle Trips By WRCOG Zone

From \ To	Central	Hemet/San Jacinto	Northwest	Pass	Southwest	Outside WRCOG	TOTAL
Central	64.3%	3.6%	13.8%	1.0%	8.5%	8.9%	100%
Hemet/San Jacinto	10.2%	72.2%	3.0%	2.9%	5.6%	6.2%	100%
Northwest	5.8%	0.3%	73.3%	0.3%	1.1%	19.3%	100%
Pass	4.9%	4.6%	3.7%	66.7%	0.5%	19.5%	100%
Southwest	6.7%	1.9%	3.9%	0.2%	79.7%	7.5%	100%

Based on RivCoM Year 2045 No-Build scenario

Table 5.3 summarizes the calculation of the split between the backbone and secondary highway networks as derived from the peak period trip values provided in **Table 5.1**. Peak period vehicle trips to and from areas outside Western Riverside County were subtracted from the calculation, on the presumption that most of their inter-regional travel would occur on the freeway system. Peak period trips between zones (regional) were assigned to the backbone network, since these trips are primarily served by the arterial roadways that provide connections between the zones. Peak period trips within zones (local) were split between the backbone network and the secondary network in proportion to their lane-miles, since roadways on both networks serve intra-zonal trips. The backbone network includes approximately 41.1% of the lane-miles on the future TUMF system, and the secondary network includes approximately 58.9% of the lane-miles.

The backbone network is therefore assigned all the inter-zonal peak period trips plus 41.1% of the intra-zonal peak period trips. The secondary network is assigned 58.9% of the intra-zonal peak period trips and none of the inter-zonal peak period trips. The overall result is that 51.1% of the regional travel is assigned to the backbone network and 48.9% is assigned to the secondary network.

Table 5.3 - Backbone-Secondary Network Share Calculation

Calculation Value Description	Input Values	Backbone Value	Backbone Share	Secondary Value	Secondary Share
Total Western Riverside County Peak Period Vehicle Trips	3,248,507				
Less Internal/External Peak Period Vehicle Trips	-659,273				
Total Peak Period Vehicle Trips Internal to Western Riverside County	2,589,234				
Peak Period Vehicle Trips Between TUMF Zones	441,747				
Peak Period Vehicle Trips Within TUMF Zones	2,147,487				
TUMF Future Network Lane-Miles	3,027.5	1,243.9	41.1%	1,783.6	58.9%
Peak Period Vehicle Trips Between TUMF Zones	441,747	441,747	100.0%	0	0.0%
Peak Period Vehicle Trips Within TUMF Zones (as share of intra-zonal trips)	2,147,487	882,332	41.1%	1,265,155	58.9%
Total Peak Period Vehicle Trips Assigned	2,589,234	1,324,079	51.1%	1,265,155	48.9%

Based on RivCoM Year 2045 No-Build scenario; TUMF Nexus Study Exhibit H-1

5.3 Application of Fee to Residential and Non-Residential Developments

In order to establish the approximate proportionality of the future traffic impacts associated with new residential development and new non-residential development, the growth in daily VMT between the 2018 Existing and 2045 No-Build Scenarios from RivCoM were aggregated by trip purpose. RivCoM produces person trips (irrespective of mode choice) on the basis of five trip purposes: home-based-work (HBW), home-based-other (HBO), home-based-school (HBSC), non-home-based (NHB), and home-based-university (HBU).

NCHRP Report #187 Quick Response Urban Travel Estimation Techniques and Transferable Parameters User's Guide (Transportation Research Board, 1978) details operational travel estimation techniques that are universally used for the travel demand modeling. Chapter 2 of this report, which details trip generation estimation, states that "HBW (Home Based Work) and HBNW (Home Based Non-Work) trips are generated at the households, whereas the NHB (Non-Home Based) trips are generated elsewhere." In accordance with NCHRP Report #187, growth in daily VMT was aggregated into home-based growth in daily VMT (combining the four home-based purposes: HBW, HBO, HBSC and HBU) and non-home-based growth in daily VMT. The home-based growth in daily VMT represents 77.7% of the total future growth in daily VMT and the non-home-based growth in daily VMT represent 22.3% of the total future growth in daily VMT, as shown in **Table 5.4**. **Appendix J** includes the RivCoM outputs used to develop the trip purpose summary in **Table 5.4**.

Table 5.4 - Daily VMT Growth by Trip Purpose for Western Riverside County (2018 - 2045)

VEHICLE TRIP PURPOSE	2018 EXISTING DAILY VMT	2045 NO-BUILD DAILY VMT	DAILY VMT GROWTH	DAILY VMT GROWTH SHARE
Home-Based-Work	81,121,525	98,818,811	17,697,286	31.8%
Home-Based-Other	114,840,696	138,710,519	23,869,822	42.9%
Home-Based-School (K-12)	8,592,941	9,230,272	637,331	1.1%
Non-Home-Based	61,534,566	73,907,099	12,372,533	22.3%
Home-Based-University	5,377,197	6,400,662	1,023,465	1.8%
TOTAL	271,466,925	327,067,363	55,600,437	100.00%
Home-Based Trips (Residential Uses)			43,227,904	77.7%
Non-Home-Based Trips (Non-Residential Uses)			12,372,533	22.3%

Based on RivCoM Year 2018 Existing Scenario, November 2023 and RivCoM Year 2045 No Build Scenario, November 2023

6.0 FAIR-SHARE FEE CALCULATION

The fee amounts, by type of development, that are justified to mitigate the cumulative regional impacts of new development on transportation facilities in Western Riverside County are quantified in this section. The total cost of improving the TUMF system is \$5.2 billion. Existing funding obligated for improvements to the TUMF system totals \$277.3 million while unfunded improvement needs generated by existing development represent \$650.9 million of the total cost. The balance of the unfunded TUMF system improvement needs is \$4.3 billion which is the maximum value attributable to the mitigation of the cumulative regional transportation impacts of future new development in the WRCOG region, and will be captured through the TUMF Program. By levying the uniform fee directly on future new developments (and indirectly on new residents and new employees to Western Riverside County), these transportation system users are assigned their “fair share” of the costs to address the cumulative impacts of additional traffic they will generate on the regional transportation system.

Of the \$4.3 billion in unfunded future improvement needs, 77.7% (\$3.3 billion) will be assigned to future new residential development and 22.3% (\$958.3 million) will be assigned to future new non-residential development.

6.1 Residential Fees

The portion of the unfunded future improvement cost allocable to new residential development through the TUMF is \$3.3 billion. Since this future transportation system improvement need is generated by new residential development anticipated through the Year 2045, the fee will be spread between the residential developments projected to be constructed between 2018 and 2045. The projected residential growth from year 2018 to 2045 is 257,826 households (or dwelling units) as is indicated in **Table 2.3**.

Different household types generate different numbers of trips. To reflect the difference in trip generation between lower density “single-family” dwelling units and higher density “multi-family” dwelling units, the TUMF was weighted based on the respective trip generation rates of these different dwelling unit types. For the purposes of the TUMF Program, single family dwelling units are those housing units with a density of less than 8 units per acre while multi-family units are those with a density of 8 or more units per acre. According to the SCAG 2020 RTP/SCS forecasts included in **Table 2.3** and **Appendix B**, single family dwelling units (including mobile homes) are forecast to constitute 65.0% of the growth in residential dwelling units in the region between 2018 and 2045.

Data provided in the Institute of Transportation Engineers (ITE) Trip Generation Manual, 11th Edition (2021) show that, on average, single-family dwelling units generate 0.99 vehicle trips per dwelling unit per hour in the PM peak hour, whereas apartments, condominiums and townhouses (considered to be representative of higher density multi-family dwelling units) generate a median of 0.50 vehicle trips per unit per hour in the PM peak hour. The growth in dwelling units for single-family and multi-family, respectively, were multiplied by the corresponding trip generation rates to determine

the weighted proportion of the change in trips attributable to each use type as the basis for determining the per unit fee required to levy the necessary \$3.3 billion to mitigate the cumulative regional transportation impacts of future new residential development. **Table 6.1** summarizes the calculation of the fee for single-family and multi-family dwelling units. **Appendix K** includes worksheets detailing the calculation of the residential (and non-residential) TUMF for Western Riverside County.

Table 6.1 - Fee Calculation for Residential Share

Residential Sector	2018 Dwelling Units	2045 Dwelling Units	Dwelling Unit Change	Trip Generation Rate	Trip Change	Percentage of Trip Change	Fee/DU
Single-Family	397,407	564,898	167,491	0.99	165,816	78.6%	\$15,668
Multi-Family	157,166	247,501	90,335	0.50	45,168	21.4%	\$7,913
Total	554,573	812,399	257,826		210,984	100.0%	

Household data based on SCAG 2020 RTP/SCS;
Trip Generation based on ITE Trip Generation (2021).

6.2 Non-Residential Fees

The portion of the unfunded future improvement cost allocable to new non-residential development through the TUMF is \$958.3 million. Estimates of employment by sector were obtained from the SCAG 2020 RTP/SCS socioeconomic data included in **Table 2.3** and **Appendix B**. From the 2045 employment forecast, the amount of employee growth in each sector was calculated. The employment figures were then translated into square footage of new development using typical ratios of square feet per employee derived from four sources including: Cordoba Corporation/Parsons Brinckerhoff Quade and Douglas (PBQD), Land Use Density Conversion Factors For Long Range Corridor Study San Bernardino and Riverside Counties, August 20, 1990; Orange County Transportation Authority (OCTA), Orange County Subarea Model Guidelines Manual, June 2001; SCAG, Employment Density Study, October 31, 2001; and the County of Riverside, General Plan, as amended December 15, 2015. Worksheets showing the development of the TUMF employee conversion factors and the application of the conversion factors to calculate the square footage of future new non-residential development in Western Riverside County are included in **Appendix L**.

To account for the differences in trip generation between various types of non-residential uses, the new non-residential development was weighted by trip generation rate for each sector. Typical trip generation rates per employee were obtained from the Institute of Transportation Engineers (ITE) Trip Generation – 11th Edition (2021), and were weighted based on a calculated value of trips per employee as derived from the employee conversion factors and ITE typical trip generation rates per square foot of development, before being assigned to the non-residential categories as follows: Industrial – 0.6 PM peak hour trips per employee, Retail – 1.8 PM peak hour trips per employee, Service – 1.2 PM peak hour trips per employee, and Government/Public –

2.1 PM peak hour trips per employee¹². These rates were applied to the employment growth in each sector to determine the relative contribution of each sector to new trip-making, and the \$958.3 million was then allocated among the non-residential categories on the basis of the percentage of new trips added. This proportionate non-residential fee share by sector was then divided by the estimated square footage of future new development to obtain the rate per square foot for each type of use. The calculation of the non-residential fee by sector is shown in **Table 6.2**.

Table 6.2 - Fee Calculation for Non-Residential Share

Non-Residential Sector	Employment Change	Trip Generation Rate per Employee	Trip Change	Percentage of Trip Change	Change in Square Feet of Gross Floor Area	Fee/SF
Industrial	76,581	0.6	45,949	15.1%	61,489,565	\$2.36
Retail	13,115	1.8	23,607	7.8%	6,557,500	\$11.35
Service	174,255	1.2	209,106	68.8%	66,735,957	\$9.88
Government/Public	12,071	2.1	25,349	8.3%	3,420,665	\$23.36
Total	276,022		304,011	100.0%	138,203,688	

Employment Change data based on SCAG 2020 RTP/SCS; Trip Generation based on ITE (2021); Change in Square Feet conversion factor based on Cordoba (1990), OCTA (2001), SCAG (2001) and County of Riverside (2015).

¹² The median trip generation rate for 'Retail' and 'Service' was reduced to reflect the influence of pass-by trips using the weekday PM peak median pass-by trip rate for select uses as derived from the ITE Trip Generation Manual (11th Edition) (September 2021).

7.0 CONCLUSIONS

Based on the results of the Nexus Study evaluation, there is reasonable relationship between the cumulative regional transportation impacts of new land development projects in Western Riverside County and the need to mitigate these transportation impacts using funds levied through the ongoing TUMF Program. Factors that reflect this reasonable relationship include:

- Western Riverside County is expected to continue growing because of future new development.
- Continuing new growth will result in increasing congestion on arterial roadways.
- The future arterial roadway congestion is directly attributable to the cumulative regional transportation impacts of future development in Western Riverside County.
- Capacity improvements to the transportation system will be needed to mitigate the cumulative regional impacts of new development.
- Roads on the TUMF network are the facilities that merit improvement through this fee program.
- Improvements to the public transportation system will be needed to provide adequate mobility for transit-dependent travelers and to provide an alternative to automobile travel.

The Nexus Study evaluation has established a proportional “fair share” of the improvement cost attributable to new development based on the impacts of existing development and the availability of obligated funding through traditional sources. Furthermore, the Nexus Study evaluation has divided the fair share of the cost to mitigate the cumulative regional impacts of future new development in Western Riverside County in rough proportionality to the cumulative impacts of future residential and non-residential development in the region. The respective fee allocable to future new residential and non-residential development in Western Riverside County is summarized for differing use types in **Table 7.1**.

Table 7.1 - Transportation Uniform Mitigation Fee for Western Riverside County

Land Use Type	Units	Development Change	Fee Per Unit	Total Revenue (\$ million)
Single Family Residential	DU	167,491	\$15,668	\$2,624.3
Multi Family Residential	DU	90,335	\$7,913	\$714.8
Industrial	SF GFA	61,489,565	\$2.36	\$144.8
Retail	SF GFA	6,557,500	\$11.35	\$74.4
Service	SF GFA	66,735,957	\$9.88	\$659.2
Government/Public	SF GFA	3,420,665	\$23.36	\$79.9
MAXIMUM TUMF VALUE				\$4,297.5

8.0 APPENDICES

The following Appendices incorporate the extent of materials used to support the development of the WRCOG TUMF Nexus Study and, where appropriate, specifically the 2024 Update. The respective Appendices also incorporate an explanation of the methodology and assumptions used to develop the various elements of the Nexus Study.

These Appendices represent a compilation of materials derived from a variety of technical resources. Each of the following Appendices relate to the development of a specific element of the Nexus Study. These Appendices are as follows:

Appendix A - List of TUMF Committees

Appendix B - Western Riverside County Population and Employment Growth 2018 – 2045

Appendix C - Western Riverside County Traffic Growth 2018 – 2045

Appendix D - Western Riverside County Transit System Ridership 2018 – 2045

Appendix E - Western Riverside County Regional System of Highways and Arterials Performance Measures

Appendix F - TUMF Network Cost Assumptions

Appendix G - TUMF 2024 Program Update Disposition of Network Change Requests

Appendix H - TUMF Network Cost Estimate and Evaluation

Appendix I - Western Riverside County Regional Trip Distribution

Appendix J - Western Riverside County Regional Trip Purpose

Appendix K - Residential Fee Calculation

Appendix L - Non-Residential Fee Calculation