

**Richard A. Parker, Ph.D.**  
**Curriculum Vitae**

**Education**

- Ph.D. Pacific Western University (Los Angeles, California)  
University of California-Los Angeles  
Doctor of Philosophy (Business Administration)
- M.B.A. University of California, Berkeley (Berkeley, California)  
Master of Business Administration  
Teacher Certification — Lifetime Secondary Credential  
(Business, Social Studies, English)
- M.C.P. San Diego State University (San Diego, California)  
Master of City Planning  
Named one of 50 Distinguished Alumni for 50<sup>th</sup> Anniversary of  
School
- B.S. University of California, Berkeley (Berkeley, California)  
Bachelor of Science — Business Administration  
(Phi Beta Kappa, With Honors)  
Brown University (Providence, Rhode Island)  
(Dean's List)

**Selected Related Professional Experience**

- 2018- Recognized as one of 50 Outstanding Alumni in 50-year history of San Diego State School of Public Affairs
- 1985- Professor (Emeritus since 2013), School of Public Affairs, San Diego State University, San Diego, California. Courses taught:
- Seminar in Urban Planning Methodologies (graduate)
  - Quantitative Methods (Statistics) (graduate)
  - Seminar in Quantitative Approaches to Public Administration (graduate)
  - Quantitative Techniques in Urban Planning (graduate)
  - Methods of Analysis in City Planning (upper division undergraduate)
  - Planning Application, Research and Program Evaluation in Criminal Justice Administration (upper division undergraduate & graduate)
  - Issues in Financing Urban Development (graduate)
  - Contemporary Urban Issues (upper division undergraduate)
  - Public Policy (graduate and upper division undergraduate)
  - Public Finance (graduate and upper division undergraduate)
  - Seminar in Economics of Urban and Regional Planning (graduate)
  - Metropolitan Area (upper undergraduate & graduate)
  - International Finance (graduate)
- 1982- President/Project Director, Rea & Parker Research & California Economic Solutions

**Survey Research Clients:**

- State of California--Senate Rules Committee
- State of California--Senate Special Committee on Border Issues
- State of California--Office of the Auditor General
- State of California--Office of the Attorney General

- Los Angeles County Metropolitan Transportation Authority
- Southern California Regional Rail Authority (Metrolink)
- Orange County Transportation Authority
- California Department of Transportation (CALTRANS)
- Bay Area Rapid Transit
- Metropolitan Transit System (San Diego Transit)
- North County Transit District
- Fresno Area Express
- Gold Line Authority (Los Angeles MTA)
- Southern California Association of Governments (SCAG)
- San Diego Association of Governments (SANDAG)
- Fresno County Association of Governments
- San Diego Gas & Electric
- San Diego County Sheriff's Department
- San Diego County Water Authority
- San Diego Unified School District
- Poway Unified School District
- Imperial Irrigation District
- Otay Water District
- Vallecitos Water District
- University of California-Berkeley
- University of California-Los Angeles
- University of California-Davis
- County of Orange
- County of San Diego
- City of San Diego
- City of San Diego Housing Commission
- City of Escondido
- City of Carlsbad
- City of Poway
- City of Davis
- City of St. Helena
- City of Dana Point
- City of Oceanside
- City of Encinitas
- Imperial Valley Association of Governments
- Imperial County Transportation Commission
- Imperial Valley Transit
- Santa Clarita Transit
- Santa Monica Municipal Bus Lines
- Culver CityBus
- Foothill Transit
- El Monte Transit
- Torrance Transit
- Cerritos on Wheels
- Commerce Transit
- Los Angeles Commuter Express
- Pasadena ARTS

- Carson Circuit
- Alhambra Transit
- Clovis Stageline
- Riverside Transit Agency
- San Diego County Law Library
- City Heights Community Development Corporation (City of San Diego)
- Centre City Development Corporation (City of San Diego)
- North Park Main Street Association (San Diego)
- Solaris Capital (Arizona)
- San Luis Rey Indian Water Authority
- California Center for Sustainable Energy
- Costco Wholesale Corporation
- Safeway, Inc.

**Economic Research Clients:**

- State of California--Senate Rules Committee
- State of California--Senate Special Committee on Border Issues
- State of California--Office of the Auditor General
- State of California--Office of the Attorney General
- California Department of Transportation (CALTRANS)
- Southern California Gas Company
- San Diego County Sheriff's Department
- San Diego Unified School District
- San Diego Gas & Electric
- Southern California Gas Company
- Pardee Construction Company
- San Diego Aircraft Carrier Museum Foundation
- Westbrook Development
- Genstar Development
- Laing Urban
- Pacific Century Development
- Subway, Inc.
- Westfield Shopping Centers
- Shea Properties
- City of San Diego
- City of San Diego Housing Commission
- City of Carlsbad
- City of Poway
- City of Holtville
- Southern California Association of Governments
- Imperial Valley Association of Governments
- San Diego County Taxpayers Association
- California Center for Sustainable Energy
- City Heights Community Development Corporation (City of San Diego)
- Centre City Development Corporation (City of San Diego)
- La Jolla Band of Mission Indians
- Viejas Enterprises

- Foxwoods Development
- Big Pine Paiute Economic Development Corporation
- Joint Labor/Management Committee-Retail Food Industry
- San Diego/Imperial Counties Labor Council AFL-CIO
- Southwest Strategies, LLC
- Stirling Enterprises
- Ivey Ranch Development Company
- Pacifica Companies
- Pacific Beachfront Resort
- Housing Solutions Alliance
- Smart Growth Coalition—National City
- Rancho Guejito Corporation
- Seacoast Inn
- Shopoff Group
- Mercado Barrio Logan
- San Diego Surf Cup Sports
- Save Starlight Bowl
- Accretive Investments
- IndieDwell
- Long Beach Children’s Clinic
- Mortgage Electronic Registration System, Inc. (MERS)
- Chelsea Investment Corp.
- Border Communities Capital Corp.
- Solaris Capital/Three Rivers Development
- Cox Communications
- Regency Shopping Centers
- Clinicas de Salud del Pueblo
- The Children’s Clinic Family Health and Wellness
- College of the Desert

**Selected Publications:**

Awards:

Bernays Award of Merit—Specialty Publication—Westfield University Town Center Expansion

Awarded: 50 Outstanding Alumni in 50-year history of San Diego State School of Public Affairs

Books

Designing and Conducting Survey Research: A Comprehensive Guide (with Louis M. Rea, Ph.D., 1992 (2<sup>nd</sup> edition 1997—3<sup>rd</sup> edition 2005—4<sup>th</sup> edition 2014). Jossey-Bass, Inc., Publishers, San Francisco.

Monographs/Research Reports

Cost Benefit Analysis: A Case Study of the Berkeley Park Marina Shopping Center, University of California, Berkeley, California, 1971, 168 pp.

The Economics of Environmental Restrictions on the Use of Urban Land, Institute of Urban and Regional Development, University of California, Berkeley, California (with Leonard Merewitz, Ph.D.), 1973, 79 pp.

Back to the City: The Middle Income Housing Market in Centre City San Diego, San Diego State University, San Diego California, 1984, 258 pp.

The Fiscal Impact of Undocumented Immigrants Residing in San Diego County, State of California, Office of the Auditor General, 1992, 129 pp.

Illegal Immigration in San Diego County: An Analysis of Costs and Revenues, State of California, State Senate Office of Reproductions, 1993, 172 pp.

### Articles

"Water Supply for Urban Southern California: An Historical and Legal Perspective," Glendale University Law Review, Vol. 8, Nos. 1-2, 1988.

"The Retail Commercial Strip in Transition: A Case Study in San Diego," The Western Governmental Researcher (with Louis M. Rea, Ph.D.), Fall, 1989.

### Selected Public Testimony

“Undocumented Immigrants in San Diego County.”

- Testimony before California State Senate Special Committee on Border Issues, Sacramento, California.
- Testimony before California State Joint Legislative Audit Committee, Sacramento, California.
- Testimony before California State Assembly, Sacramento, California.

Many consulting projects presented to County Boards of Supervisors, City Councils, Public Agency Boards of Directors

### Legal Consulting/Expert Witness: Survey Research and Statistical Analysis

- a. Ryan Walsh, Graham Wiseman v. Ikon Office Solutions, Inc. (court testimony, deposition, and declarations).
- b. George Lopez, et al. v. Kaiser Foundation Health Plan, Inc. (declaration)
- c. Gonzalez v. Freedom Communications, Inc. dba The Orange County Register (deposition and declarations)
- d. Esteban Zamora, et al. v. Balboa Life & Casualty, LLC, et al. (declarations and deposition)
- e. Tate and Lighter v. Kaiser Foundation Health Plan, Inc. (declaration)
- f. Catherine Sullivan v. Kelly Services, Inc. (declaration)
- g. Cynthia Flores v. CVS Pharmacy, Inc. et al (declarations)
- h. Bauer Bros, LLC v. Nike, Inc. (statistical analysis)
- i. Wallace, et al. v. Countrywide Home Loans (declarations and deposition)
- j. Morgan, et al. v. Wet Seal, Inc. (declaration and deposition)
- k. Stephen Weisbarth, et al. v. Banc West Investment Services, Inc. et al. (declaration)
- l. Paul Lemerise, Elene Wood, et al. v. Loan Depot, Inc.(statistical analysis)

- m. Nathan Cozzitorto, Rena Cozzitorto, and Michael Cozzitorto, Sr., vs. American Automobile Association of Northern California, Nevada and Utah (declaration)
- n. Jose F. Andino vs. Kaiser Foundation Hospitals (Declaration)
- o. LILIANA CANELA, v. COSTCO WHOLESALE CORPORATION (declaration, survey research, deposition, court testimony)
- p. Eva Sharp v. Safeway Inc (survey research and report)
- q. Salazar/Gamez v. PODS Enterprises (statistical research and declaration)
- r. Coffey v. Southern California Permanente Medical Group, Inc. (retained as expert—reviewed documents--no deliverables to date)
- s. Rodriguez v. Costco Wholesale Corporation (retained as expert—no deliverables to date)

### **Survey Research Consultative Projects**

#### **Los Angeles County Metropolitan Transportation Authority:**

##### On-Board and Telephone Bus Surveys

- On-Board bus survey for MTA, Foothill Transit, and Duarte Transit concerning expansion of Gold Line—800 respondents
- Conducted the On-Board Bus Survey for Los Angeles County Metropolitan Transportation Authority, including 40,000 rider/on-board surveys, 2,500 follow-up telephone interviews, and 10 focus groups.
  - Final deliverables include/included 4 reports:
  - Satisfaction, travel patterns, fare media, and demographics of 31,000 weekday bus riders on LACMTA buses and those of 12 municipal transit operators within Los Angeles County (**Alhambra Community Transit, Culver City Bus Lines, Commerce Transit, Pasadena ARTS, Cerritos-On-Wheels (COW), Santa Monica Big Blue Bus, Los Angeles Commuter Express, Santa Clarita Transit, Torrance Transit, Carson Circuit, El Monte Trolley, and Foothill Transit**).
  - Satisfaction, travel patterns, fare media, and demographics of 3,500 weekend bus riders on LACMTA buses.
  - Detailed follow-up telephone survey of 2,500 weekday riders of MTA and 12 municipal operators expanding upon demographics, satisfaction, problem occurrence, importance/concern, travel behavior, use of MTA website, customer service, and marketing media and messages.

- Geocoded home, origin (production), boarding, alighting, and destination (attraction) data is presented in color graphics by line, service sector, and planning area.
  - Prepared the on-board survey instrument for LACMTA and each of the 12 municipal operators and had its surveyors ride the buses of randomly selected bus runs with follow-up surveys also conducted on-board the following year.
  - Prepared and tested the survey instrument in 10 focus group sessions conducted in Los Angeles County and in two extensive on-board pretests involving almost 1,000 respondents. Focus groups were conducted in different geographical areas of the County, among different age and ethnic groups, and in both Spanish and English.
  - The telephone survey consisted of 39 questions, including 110 individual variables. The mean survey time was 13.09 minutes, administered in both English and Spanish. Media information concerning messages communicated on television was added to more typical transportation-based questions. The analysis consisted of detailed crosstabulations, correlations, and analyses of variance in order to assess market segmentation strategies.
- On-Board survey of Gold Line riders concerning expansion plans—800 respondents
  - Conducted the On-Board Rail Survey for **Los Angeles County Metropolitan Transportation Authority**, including 15,000 rider/on-board surveys, 1,000 follow-up telephone interviews, and 3 focus groups.
    - Final deliverables include/included 4 reports:
      - Satisfaction, travel patterns, fare media, and demographics of 12,000 weekday riders on LACMTA Metro Rail—Blue, Green, and Red Lines.
      - Satisfaction, travel patterns, fare media, and demographics of 3,000 weekend bus riders on LACMTA Metro Rail—Blue, Green, and Red Lines.
      - Detailed follow-up telephone survey of 1,000 weekday and weekend riders of Metro Rail expanding upon demographics, satisfaction, problem occurrence, importance/concern, travel behavior, use of MTA website, customer service, and marketing media and messages.

- Geocoded home, origin (production), and destination (attraction) data is presented in color graphics by line.
- Prepared the on-board survey instrument for LACMTA and had its surveyors ride the trains on randomly selected runs, with follow-up surveys also conducted on-board the following year.
- Prepared and tested the survey instrument in 3 focus group sessions conducted in Los Angeles County and in two extensive on-board pretests involving almost 500 respondents. Focus groups were conducted in different geographical areas of the County, among different age and ethnic groups, and in both Spanish and English.
- The telephone survey consisted of 42 questions, including 103 individual variables. The mean survey time was 12.29 minutes, administered in both English and Spanish. Media information concerning messages communicated on television was added to more typical transportation-based questions. The analysis consisted of detailed crosstabulations, correlations, and analyses of variance in order to assess market segmentation strategies.
- 600-person telephone survey in San Gabriel Valley concerning expansion of Gold Line and Measure R

**Orange County Transportation Authority (OCTA):**

- Intercept survey of 1,950 bus riders in Orange County regarding origin-destination, customer satisfaction, and messaging.
- Prepared, conducted and analyzed 2,000 person rider/on-board bus survey for the **Orange County Transportation Authority** regarding monthly, weekly, and daily bus pass sales. Prepared questionnaire, administered survey, analyzed data in order to assess potential for expanding bus pass sales.
- Marketing program consultant in OCTA's effort to attract and retain more riders, particularly from Hispanic and senior citizen groups. Sixteen focus groups were scheduled and twelve conducted (four having been deferred at OCTA's request to July, 2002).
- Conducted the CenterLine Customer Profile for the **Orange County Transportation Authority** involving intercept surveys of 8,800 potential urban light rail users, 1,500 telephone survey interviews, and 12 focus group/roundtables. Final analysis assessed likely ridership, preferred destinations, trip purposes, public support, demographic and psychographic profiles of potential light rail ridership



- Prepared Multi-Cultural Market Assessment Study for transportation services in Orange County. Formulated baseline data and marketing strategies for long- and short-term transportation related issues facing Orange County's diverse multi-cultural communities, with particular emphasis upon Hispanic and Vietnamese communities. Administered three different statistical surveys including intercept and rider/on-board formats, each in English, Spanish, and Vietnamese.
- Prepared, conducted and analyzed Vietnamese ridership study, including in-person intercept survey, telephone sample survey, and focus group among Vietnamese community leaders regarding current bus service and future transit needs in the Vietnamese areas of Orange County.
- 2007--Analyzed 2,000 person ACCESS (disabled paratransit) customer service satisfaction survey.
- 2007—conducted and analyzed counts of passengers on Amtrak and Metrolink trains at every Orange County station plus Oceanside, Norwalk, and Commerce.
- 2008—Focus groups (4) concerning integration and improvements to service (Metrolink, Amtrak, Coaster) along Los Angeles-San Diego (LOSSAN South ) corridor
- 2008/2009—Rail safety study including observations at each of 54 at-grade rail crossings in Orange County, interviews with 60 local decision makers and other community leaders, and 600 person residential telephonic survey.
- Conducted focus groups among senior/disabled bus riders and full fare bus riders concerning proposed restructuring of bus fares. Also conducted roundtable meetings with coach operators and social service agency representatives.
- Conducted public participation portion of Orange County Bus Improvement Project (BUSLINK). Prepared report based upon focus group discussions with bus users and non-users, employee transportation coordinators, real estate developers, senior citizens, students, transportation advocates, Orange County employers, and members of ethnic minority communities throughout the County. Final report summarized the perceptions of focus group participants concerning potential improvements to the bus system.
- Conducted focus group discussions with Metrolink commuter rail users and non-users within Orange County for purposes of identifying service and marketing issues and opportunities. Prepared final report summarizing findings from these focus group discussions.
- Conducted focus group discussions with clients of ACCESS paratransit service for purposes of identifying the viability of alternative transportation options.

- Conducted focus groups among users of ACCESS for purposes of refining six strategies for providing a financially viable service to ACCESS customers and prepared formal final report.
- Conducted a series of roundtable discussions concerning the implementation of changes in the ACCESS system pertaining to reservations, eligibility, schedule, rates, pick-up and delivery policy, etc., and prepared formal final report.
- Conducted focus group discussions concerning Master Plan of Countywide Commuter Bikeways and prepared final report.
- Prepared Multi-Cultural Market Assessment update, including focus groups within the Hispanic community concerning the marketing of transportation services. Evaluated the success of programs commenced following the initial Multi-Cultural Market Assessment.
- Conducted focus group and roundtable discussions with community leaders, general public, and representatives of goods movement/freight industry regarding long-range transportation planning in Orange County.
- Conducted focus groups among businesses and residents of Orange County concerning recommended Corridor (Fullerton-Irvine) Transportation Strategy.
- Conducted focus groups among residents of northern, central, and southern Orange County regarding the FastForward long-range transportation.
- Conducted roundtables and focus groups concerning routing issues and public support for the CenterLine urban light rail system proposed for Orange County.
- Conducted focus groups among public outreach firms to determine opinions concerning consulting for OCTA—contact administration, pricing, clarity of tasks, and so forth

**State of California (Senate Rules Committee, Senate Select Committee on Border Issues, and Office of the Auditor General)**

- Analysis of fiscal impact of undocumented immigrants on public services in San Diego County and California, including criminal justice system, education, and public health. Further identified estimated number of undocumented residents and their contributions to State and local tax revenues. Also included in the analysis were federal revenues, false documentation issues, and macro economic impacts. Study included substantial primary data gathering techniques, including direct interviews with undocumented immigrant workers and INS returnees. Prepared, administered, and analyzed sample surveys of undocumented immigrants in San Diego County for purposes of determining employment characteristics, revenue generation, demographics, and migration patterns. Research included extensive face-to-face interviews and structured roundtable discussions.

### **San Diego County Water Authority Public Opinion Surveys**

- Prepared, implemented, and analyzed 2003, 2004, and 2005, 2006, 2008, 2009, 2011, and 2012 Public Awareness Survey of telephone respondents (600 in 2003, 710 in 2004, 725 in 2005, and 700 in 2006, 2008 and 2009) concerning behavior, opinion, rate tolerance, future needs assessment issues, desalination, water reclamation, conservation practices.
- Prepared, implemented, and analyzed survey of General Managers and Department Heads of 23 member agencies about satisfaction, effectiveness, usefulness of services and programs provided by Water Authority in 2003 and 2005
- Prepared, implemented, and analyzed employee satisfaction survey of Engineering Department.
- Prepared, implemented, and analyzed 400 respondent survey among San Diego County contractors regarding project labor agreements and public works contracting.
- 2008—two 600 person telephone surveys tracking before and after impacts of public awareness campaign concerning water conservation.

### **City of Oceanside**

- Prepared implemented, and analyzed telephonic survey of 803 residents of Northern San Diego County concerning awareness, behavior, and opinions about water runoff pollution.

### **San Diego County**

- Prepared, implemented, and analyzed 1,305 person telephonic survey of unincorporated area residents concerning awareness, behavior, and opinions about water runoff pollution.
- Conducted, analyzed and reported upon two 600-person telephonic public opinion and awareness surveys before and after public awareness campaign to inform county residents about emergency preparedness.
- Prepared, implemented, and analyzed 8 intercept surveys of law library users concerning classes offered, benefits, opportunities for improvement.
- Evaluated the San Diego Community Planning Process as viewed by planning group participants and informed parties (developed questionnaire, analyzed data, and prepared a final report).

### **City of Coronado**

- Prepared, implemented, and analyzed 600 respondent in-person intercept survey of visitors to identify places of staying, recreational activities, modes of transportation.

### **City of Carlsbad**

- Prepared, implemented, and analyzed citywide sample telephone survey of 600 respondents concerning future urban commercial development in this fast growing Northern San Diego County city. Extensive analysis of underlying values through various development scenarios and conjoint analytical techniques was featured.

### **City of San Diego**

- 1,100 person telephone and online survey regarding communication preferences and information sources for City of San Diego residents (in process)
- Prepared, implemented, and analyzed 400 person telephone survey of residents of three low income San Diego communities concerning issues such as crime, economic development, city services, and the success of the City's "Weed and Seed Program."
- Prepared, administered, and analyzed sample survey of San Diego County residents for purposes of assessing utilization and demand factors for Mission Bay Park in San Diego. This survey of 850 persons served to inform the revision of the Park's Master Plan.
- Analysis of market for existing condominium developments in downtown San Diego. Detailed analysis included extensive survey and corresponding statistical and qualitative analysis including recommendations for future market composition.
- Consultant for the revitalization of an older commercial retail area in mid-city San Diego seeking to rejuvenate its retail base. Three surveys and a series of key participant discussions were performed in conjunction with this effort--existing retailers, potential retailers, and residents of the area--plus corresponding statistical and qualitative analysis. Final report included a recommended retail structure for the community that would be realistic, implementable, and sensitive to the diversity of ethnicity in this community.
- Prepared, conducted, and analyzed 600 person telephone survey in mid-city for purposes of establishing need for community court in the area populated by myriad

low-income minority and immigrant groups. Also in-person interviews/surveys of 100 local business owners.

- Prepared, implemented and analyzed 400 person survey of City residents concerning water supply awareness, conservation attitudes and behaviors, and opinions about water recycling—2004, 2011 and 2012.

### **County of Orange**

- Prepared, implemented, and analyzed 1,040 person telephone survey of unincorporated area (North Tustin) in order to assess level of service satisfaction issues and potential annexation/sphere of influence adjustments

### **County of San Diego**

- Prepared, implemented and analyzed two 600 person surveys of County residents concerning emergency preparedness before and after public information campaign

### **Otay Water District**

- 2019 Employee Satisfaction online survey
- 2015 Customer Awareness and Satisfaction Survey (n =400)
- 2013 Customer Awareness and Satisfaction Survey (n =350)
- 2012 Customer Awareness and Satisfaction Survey (n = 550)
- 2012 Call Center Customer Service Survey (n = 300)
- 2011 Customer Awareness and Satisfaction Survey (n = 300)
- 2010 Desalination Survey—400 respondents and 2 focus groups
- 2010 Employee Satisfaction online survey
- 2009 Customer Awareness and Satisfaction Survey of 300 customers of the District
- 2009 Large Users Drought Telephone Survey
- 2008 Customer Service telephone survey of 300 participants prepared, conducted, and analyzed.
- 2008 Customer Awareness and Satisfaction telephone survey of 300 participants prepared, conducted, and analyzed

- 2008 Employee Satisfaction survey prepared conducted and analyzed using web-based instrument.
- 2007 residential customer satisfaction/awareness (n=300) telephone survey prepared, implemented and analyzed. Emphasis upon customer satisfaction and conservation measures.
- 2007 Call Center customer service telephone survey (n = 200) focused upon satisfaction with customer service and communications.
- 2005 customer satisfaction survey of 350 residential customers concerning behavior, opinion, customer service, desalination, water reclamation, and conservation practices.

### **Imperial Irrigation District**

- Instruction to energy traders in use of mathematical and statistical tools to aid in their requisite analyses.
- Developed statistical models that predict energy consumption based upon various climactic conditions to within 1-3% of actual.

### **San Luis Rey Indian Water Authority**

- Prepared and supervised administration of detailed census and opinion survey of 2,500 members of five Indian tribes. Particular emphasis was given to issues of importance to the tribes' members such as job opportunities, education, cultural issues, economic development opportunities and transportation access issues. Focus group sessions with each tribe were utilized to complement the survey findings. Final report included both census data and fully tabulated and statistically analyzed summary of the opinions of reservation residents.

### **City of Poway, California**

- Prepared, administered, and statistically analyzed a mail survey of 800 Poway businesses regarding their needs and opinions concerning Poway's business climate and future opportunities. Final report included detailed analysis and exposition, including recommendations where appropriate.
- Prepared, administered, and statistically analyzed a mail survey of 6,000 Poway households concerning their opinions regarding a variety of issues of importance to the City for future planning. Final report included fully tabulated results with accompanying statistical reports

### **North Park Main Street Association**

- Conducted two intercept surveys--business owners and shoppers in San Diego Main Street National Historic Preservation Area in order to determine shopping needs and level of improvement or decline in area since the implementation of the Main Street program.

### **City of Dana Point, California**

- Prepared recreation and parks needs assessment survey for administration to general public.

### **City of Davis**

- Prepared, administered, and analyzed sample survey of 833 residents of Davis, California for purposes of assessing utilization, demand, and tax allocation factors for City of Davis Department of Parks and Recreation in concert with the preparation of the Master Plan.

### **City of St. Helena**

- Prepared, administered, and analyzed 400 respondent sample survey of City of St. Helena, California residents for purposes of General Plan revisions.

### **Santa Clarita Transit**

- Three focus groups among Latinos, commuters, and local bus riders to identify service and marketing-related issues and policies for rider attraction and retention.

### **Southern California Regional Rail Authority (Metrolink)**

- Determined the requisite two-stage sample for Federal Transportation Agency requirements for annual passenger and mileage calculations.
- Conducted a 3,500 person rider/on-board sample survey on 7 Metrolink lines regarding customer satisfaction, importance, problem occurrences, travel behavior, marketing strategies, and demographics. Also undertaken were precise counts of passenger boardings and alightings at each station for each train in the Metrolink train system.
- Conducted a 6,000 person rider/on-board sample survey on 6 Metrolink lines regarding customer satisfaction, importance, problem occurrences, travel behavior, marketing strategies, and demographics.

- Conducted focus groups with student riders and potential riders of Metrolink.
- Conducted Riverside County rider focus groups for Metrolink regarding use of new stop and need for reverse commute trains.

### **California Department of Transportation**

- Prepared growth inducement study for State Route 56 through the northern portion of the City of San Diego. Study included fiscal impacts as well as housing, employment, and income forecasts; also included were planning implications of possible growth inducing factors associated with the construction of the highway.
- Conducted focus groups and web-based survey of CALTRANS engineers regarding job satisfaction and staff morale.
- Eight surveys among pilot study riders of combined commuter train/rental car system of commuting.

### **San Diego County Sheriff's Department**

- Established analysis by station (11) of workload and availability for calls for service among Sheriff's patrol deputies. Over 3,000 samples drawn and analyzed to establish manpower needs.
- Utilized scientific sample to analyzed time savings applicable to the conversion of arrest data to laptop computers from manual entry. Final report included specific determination of manpower hours saved and recommendations for software and operational policy changes in order to maximize technological advantages.
- Workload analysis based upon sample of time logs from Sheriffs Communication Center and Monte Carlo simulations in order to identify necessary staffing levels for 9-1-1, radio, and administrative communications throughout San Diego County

### **San Diego Unified School District**

- Survey of building contractors concerning economic impacts of Project Stabilization Agreement with local trade unions regarding school construction projects.

### **Poway Unified School District**

- Telephone survey of 400 district residents pertaining to satisfaction with existing bond program and potential for future borrowing.



### **Bay Area Rapid Transit**

- Market analysis and ridership projection for two stations located on East Bay line of BART.

### **Southern California Association of Governments**

- 800 person survey and 6 focus groups to determine desired route for high-speed rail from Northern California between Los Angeles and San Diego.
- 5200 person survey of pedestrian, passenger vehicle, and commercial truck border crossers at Calexico and Algodones/Yuma pertaining to trip purpose, frequency, origin/destination, and other factors.

### **Riverside Transit Agency**

- On-board survey of 8000 riders of Riverside bus system regarding satisfaction, frequency, demographics
- On-board survey and count of RTA bus lines that intersect with Downtown Riverside Transit Terminal in order to identify magnitude and nature of travel disruptions that will occur when terminal is relocated
- On-Board survey of commuter bus lines
- Intercept of 1000 passengers transferring and/or ending trip at Downtown

### **San Diego Metropolitan Transit System**

- Survey of passengers at trolley stations
- On-board counts of weekend contract service
- Conducted focus groups concerning routing/scheduling and planning/marketing issues for the expansion of the San Diego Trolley.
- Intercept surveys of 500 passengers at two rail stations concerning moving transit center.

### **San Diego Association of Governments**

- Focus groups concerning carpool, vanpool, transit alternative commute options.
- Survey of 400 San Diego County businesses (plus focus groups) regarding telework policies, opportunities and challenges.

- 400-person intercept survey at International Border concerning parking costs, availability and other issues.

### **Imperial Valley Transit/Imperial County Transportation Commission**

- Year long sample survey (2022-2023) and count of passengers on-board buses in order to meet Federal Transportation Agency requirements for statistically reliable estimate of annual passenger miles traveled
- Year long sample survey (2019-2020) and count of passengers on-board buses in order to meet Federal Transportation Agency requirements for statistically reliable estimate of annual passenger miles traveled.
- Year long sample survey (2016-2017) and count of passengers on-board buses in order to meet Federal Transportation Agency requirements for statistically reliable estimate of annual passenger miles traveled.
- Year long sample survey (2013-2014) and count of passengers on-board buses in order to meet Federal Transportation Agency requirements for statistically reliable estimate of annual passenger miles traveled.
- Year long sample survey (2010-2011) and count of passengers on-board buses in order to meet Federal Transportation Agency requirements for statistically reliable estimate of annual passenger miles traveled.
- Year long sample survey (2008-2009) and count of passengers on-board buses in order to meet Federal Transportation Agency requirements for statistically reliable estimate of annual passenger miles traveled

### **University of California PATH/SANDAG**

- Six Month panel for focus groups and surveys at start and end concerning new transit plan that utilizes rental cars at either end of transit trip.

### **University of California, Davis**

- Web-based survey of all identifiable San Francisco Bay Area water management professionals concerning water conservation policies and practices, including follow-up telephone interviews.

### **Solaris Capital/Three Rivers Development**

- Sampling methodology to determine economic hardship status for Inncare patients

### **City of Escondido**

- Prepared, administered, and statistically analyzed telephone survey of 425 residents concerning library facilities.

### **California Center for Sustainable Energy**

- Focus groups concerning the use of solar energy for residential power users – both contractors and residents participated.
- Focus groups among homeowners with photovoltaic systems, real estate professionals, and city/county permitting and inspection officials concerning barriers to and solutions pertaining to photovoltaic system installation and ownership.

### **North County Transit District**

- Online survey of commuters and residents of Camp Pendleton regarding transportation needs.

### **Fresno Area Express**

- On-board bus survey (n =3,700) regarding origins, destinations, modes of access and egress, demographics
- Intercept bus stop surveys re: rider satisfaction (n =1,500 in 2014 and 1850 in 2018, n= 1500 in 2022)
- Telephone satisfaction survey of para-transit customers in 2014, 2018 and 2022 (n = 400 each)

### **Fresno Council of Governments**

- 950 person telephone and online survey to determine community values and transportation funding priorities.

### **Vallecitos Water District**

- Telephone survey (n=300) regarding conservation, awareness of district activities and communications

### **City of Encinitas**

- Online survey (n = 1275) regarding alternative transportation (walking, bicycling, transit) preferences and usage

### **Costco Wholesale Corporation**

- Two electronic surveys of Costco customers (n =800) regarding customer service

### **Safeway, Inc.**

- On-site, in-store customer service survey

## **Economic, Financial, and Fiscal Impact Analyses**

### **State of California (Senate Rules Committee, Senate Select Committee on Border Issues, and Office of the Auditor General)**

- Analysis of fiscal impact of undocumented immigrants on public services in San Diego County, including criminal justice system, education, and public health. Further identified estimated number of undocumented residents and their contributions to State and local tax revenues. Included in the analysis were federal revenues, false documentation issues, and macro-economic impacts. Study included substantial primary data gathering techniques, including direct interviews with undocumented immigrant workers and INS returnees for purposes of determining employment characteristics, revenue generation, demographics, and migration patterns.

### **California Department of Transportation**

- Prepared growth inducement study for State Route 56 through the northern portion of the City of San Diego. Study included fiscal impacts as well as housing, employment, and income forecasts; also included were planning implications of possible growth inducing factors associated with the construction of the highway.

### **San Diego County Taxpayers' Association**

- Prepared economic and financial analysis of San Diego County Multiple Species Conservation Program for presentation to Planning Commission, City Council, and Board of Supervisors, including imposition of fee required to assemble the land.

- Prepared analysis of economic effects of proposed San Diego development impact fee program. Study included both academic, theoretical analysis and practical fiscal impact considerations.
- Written analysis and critique of Planned Growth and Taxpayer Relief Initiative – Development Impact Fee proposal for consideration before San Diego City Council.
- Fiscal Impact Analysis of Olivenheim Dam project of San Diego County Water Authority
- Prepared general fiscal impact analysis of mobile home rent control ordinances in State of California.

### **Westfield Shopping Centers**

- Analysis of proposed City of San Diego Affordable Housing Impact Fee, including recalculation and allocation among land uses
- Analysis of potential sales and fiscal impact due to expansion of University Town Center, La Jolla, CA

### **San Diego Aircraft Carrier Museum Foundation**

- Prepared fiscal impact analysis regarding the establishment of the USS Midway aircraft carrier museum on San Diego Bay.

### **Pardee Construction Company**

- Prepared Economic Impact Analysis of proposed all-cargo airport at Brown Field, including job creation and related industrial/commercial/visitor development
- Prepared Economic/Fiscal Impact Analysis of 2,650 acre “high-end” Pacific Highlands Ranch residential development in Carmel Valley area of San Diego. Included determination of impact fees.

### **Westbrook Development**

- Economic/Fiscal Impact Analysis of 2,550 acre residential/ commercial/resort development at Fanita Ranch in Santee. Included determination of impact fees for the development and alternative use as open space.

### **Genstar Development**

- Economic/Fiscal Impact Analysis of 3,000 acre 4S Ranch residential/commercial development in San Diego County. Included determination of development impact fees.

### **San Diego Gas & Electric**

- Analysis of feasibility and fiscal impact of City of San Marcos proposal to form and operationalize its own municipal utility—Discovery Valley Utility
- Environmental/Fiscal analysis of San Diego Gas & Electric’s 2004 Energy Resource Plan.
- Economic analysis of Sunrise PowerLink to Imperial County
- Analysis of fiscal impact of Carlsbad agricultural protection measures proposed on 2006 ballot
- Development of economic impact and fiscal model applicable to Sunrise PowerLink, smart meters, ECO substation, South Bay substation, Dynamic pricing, and renewable energy development, South Orange County Reliability Project, among others).. Model recalibrated and used continuously for new projects.
- Economic impact analysis for L-3602 pipeline project

### **Southern California Gas Company**

- Development of economic impact and fiscal model applicable to System Reliability Project and Pipeline Safety Enhancement Plan affecting 12 counties in California. Model recalibrated and used continuously for new projects.
- Economic impact analysis for North-South pipeline project in Riverside, San Bernardino, Orange and Los Angeles Counties.
- Economic impact analysis for System Reliability Project.

### **San Diego Unified School District**

- Economic analysis of bidding, construction costs , delays, labor compliance and others pertaining to construction projects for San Diego Unified School District.

### **Southwest Strategies, LLC**

- Fiscal Impact analysis for potential rezoning of industrial land to residential in Oceanside, California—determined and compared impact fees for industrial and residential use, including transportation impact fees.
- Analysis of proposed City of San Diego Affordable Housing Impact Fee, including recalculation and allocation among land uses.
- Socio-economic profile of residents of 5 affordable housing developments in the City of Poway, including demographics, spending, impacts on crime, schools, property values
- Examination of financial implications of rezoning Old Town National City to remove non-conforming industrial uses
- Economic and fiscal impact of expansion of Costa Verde Shopping Center, La Jolla, CA

### **Shea Properties**

- Fiscal impact of proposed redevelopment of Barrio Logan with Mercado and affordable housing in San Diego.
- Fiscal impact of second project planned for Barrio Logan
- Fiscal and economic impact of shopping center/hotel development in Cypress, CA

### **Pacifica Companies**

- Fiscal and economic impact of oceanfront resort in San Diego County
- Fiscal and economic impact of converting Oxnard, CA suites hotel into senior living accommodations

### **One World Beef**

- Fiscal, economic and community impact consultant for acquisition and rehabilitation of large meat packing facility in order to obtain New Market Tax Credits.

### **Laing Urban**

- Fiscal Impact analysis for potential rezoning of industrial land to residential in Culver City, California-- determined and compared impact fees for industrial and residential use, including transportation impact fees

### **San Diego-Imperial Counties Labor Council AFL-CIO**

- Analysis of San Diego County Water Authority-Imperial Irrigation District water transfer in terms of environmental and economic obstacles faced and economic development opportunities to be derived from funds to be available within the Imperial Valley.

### **WESTEC Services, Inc.**

- Prepared socioeconomic present condition, impact, and mitigation sections of Environmental Impact Report for California State Prison and San Diego County jail and honor camp at Otay Mesa. Also prepared project description and statement of needs chapter, crime rate and socioeconomic hazards sections.

### **Mooney & Associates**

- Prepared socioeconomic present condition, impact, and mitigation sections of economic impact report for expansion of San Diego County jail in Santee. Also prepared project description and statement of needs chapter, crime rate and socioeconomic hazards sections.

### **Joint Labor Management Committee of the Retail Food Industry**

- Analysis of impacts of large “big box” retailers upon existing merchants. Particular emphasis upon downtown impacts and planning consequences in light of movement toward smart growth. San Diego’s City of Villages strategy was assessed in this regard.
- Economic Impact of supercenter retail development upon California jobs, health and welfare expenditures, and general economic conditions.

### **City of San Diego**

- Determined shopping needs and level of improvement or decline in North Park community since the implementation of the Main Street Historic Preservation Program.
- Analysis of market for existing condominium developments in downtown San Diego. Detailed analysis included extensive survey and corresponding statistical and qualitative analysis including recommendations for future market composition.
- Consultant for the revitalization of an older commercial retail area in mid-city San Diego seeking to rejuvenate its retail base. Final report included a recommended



retail structure for the community that would be realistic, implementable, and sensitive to the diversity of ethnicity in this community.

#### **La Jolla Band of Mission Indians**

- Marketing and management consultants for Sengme Oaks Water Park, a water theme amusement park in Northern San Diego County. Prepared formal marketing and management plans for the Park.

#### **Merrill Lynch Commercial Real Estate**

- Provided a variety of on-going property valuation and real estate consultative services including improved and unimproved real property appraisals and land use feasibility planning for large acreage.

#### **City of Carlsbad**

- Analyzed future urban commercial development in fast growing Northern San Diego County city.

#### **Border Communities Credit Corp/Chelsea Investments, Inc.**

- Analysis of job creation for development projects in Escondido, Los Angeles (2), and San Pedro
- Analysis of job creation for development projects in Yuma (AZ), Rancho Cordova, and Fresno.
- Analysis of job creation for development projects in Bakersfield, Exeter, Indio, National City, Visalia, Reedley, and Fresno,
- Analysis of development projects in San Diego, Bakersfield, Cathedral City, Madera, Mendota, and Blythe
- Analysis of job creation for three development proposals: Children's Village in San Diego, child care facilities and four-story offices in San Diego, and residential/commercial development in San Luis Rio Colorado, AZ.
- Analysis of job creation for 6 development proposals—San Diego, CA, Chula Vista, CA Brawley, CA, Imperial, CA, Yuma, AZ, El Paso, TX
- Analysis of job creation for 4 development proposals—San Diego, CA (2), Huron, CA, and Las Cruces, New Mexico

### **Stirling Enterprises**

- Fiscal Impact analysis of proposal to rezone parcel of industrial land into multiple residential in Oceanside, California--determined and compared impact fees for industrial and residential use, including transportation impact fees
- Projected Jobs-Housing equilibrium point for City of Oceanside

### **Viejas Enterprises**

- Socio-economic analysis of proposal to locate Indian casino in City of Calexico, California
- Socio-economic/fiscal impact analysis of tribal casino in Alpine, California

### **Foxwoods/Pauma Development**

- Multiplier, Housing Needs, Employment, Crime, Pathological Gambling analyses for casino development in northern San Diego County

### **Big Pine Paiute Economic Development Corporation**

- Economic/Fiscal impact analysis of proposed Indian Travel Plaza/Casino on US 395 near Big Pine and Bishop, California.

### **County of Orange**

- Prepared, implemented, and analyzed study of unincorporated area (North Tustin) in order to assess level of service satisfaction issues and potential annexation/sphere of influence and fee adjustments.

### **Housing Solutions**

- Socio-economic profile of residents of 5 affordable housing developments in the City of Poway, including demographics, spending, impacts on crime, schools, property values

### **National City Smart Growth Coalition**

- Planning and economic consultant to business owners in National City Westside regarding new land use plan for community.

### **City of Davis**

- Prepared, administered, and analyzed study of Davis, California for purposes of assessing utilization, demand, and tax allocation factors for City of Davis Department of Parks and Recreation in concert with the preparation of the Master Plan.

### **Subway, Inc. and Pacific Century Development**

- Analysis of two sites in Blythe, CA to determine market absorption potential for new hotel/motel developments.

### **City of Holtville**

- Economic consultant to City in process of dissolving Joint Powers Authority in order to secure fair share of proceeds.

### **San Diego Housing Commission**

- In accordance with the City of San Diego SRO Preservation Ordinance, an inventory of all existing guest rooms in the City of San Diego was performed in order to retroactively identify rooms that qualified as single room occupancy hotel rooms as of December 1985, December 1987 and May 1988. The purpose of this survey was to identify a baseline number of such units for presentation purposes. Prepared SRO identification methodologies, computerization formats, statistical analyses, and final report with room-by-room breakdown.

### **Rancho Guejito Corporation**

- Fiscal impact and economic analysis of proposed Multiple Species Conservation Program—North County.
- Fiscal impact and economic analysis of proposed General Plan Update for San Diego County
- Analysis of impact of San Diego County General Plan upon transportation, education, and public safety services in rural San Diego County.

### **Mortgage Electronic Registration Systems, Inc. (MERS)**

- Costs and benefits to consumers and taxpayers of electronic registration system for mortgages throughout United States. MERS is service owned by Fannie Mae,

Ginnie Mae, Bank of America, Chase, Wells Fargo and all other major banks in U.S.

### **Ivey Ranch Development Company**

- Fiscal and economic impact analysis of three development alternatives for 10 acre site in Oceanside California

### **Shopoff Group**

- Fiscal and economic impact analysis of two development alternatives for 4.5 acre site in Oceanside, California
- Fiscal and jobs impact for proposed residential development in Vista, California
- Fiscal analysis of 70 unit condominium project in San Diego County.
- Fiscal and employment analysis of beachfront luxury condominium development proposal—Carlsbad, California

### **Accretive Investments**

- Fiscal Impact analysis of 600 acre, 1,800 housing unit and retail development in unincorporated area of northern San Diego County.

### **Cox Communications**

- Fiscal and economic impact analysis of Cox Communications California operations.

### **Regency Shopping Centers**

- Fiscal and economic impact analysis of revitalization of Costa Verde Shopping Center, La Jolla, California

### **Clinica de Salud del Pueblo**

- Community impact analysis for medical center in El Centro, California

### **Solaris Capital/Three Rivers Development**

- Economic impact analyses for 20 New Market Tax Credit Projects in Alabama, Tennessee and Mississippi.

## College of the Desert

- Economic and Employment Impact Analyses for 4 College Expansion Projects
  - Roadrunner Motors Training
  - East Valley Campus (Indio) Expansion
  - Palm Springs Development Project
  - Indio Child Development Center

## IndieDwell

- Community Fiscal and Economic Impact Analysis for mobile home manufacturer in Brawley, CA

## Long Beach Children's Clinic

- Community Fiscal and Economic Impact Analysis for children's hospital and affordable housing project in Long Beach, CA

## Survey and Economic Analysis References

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