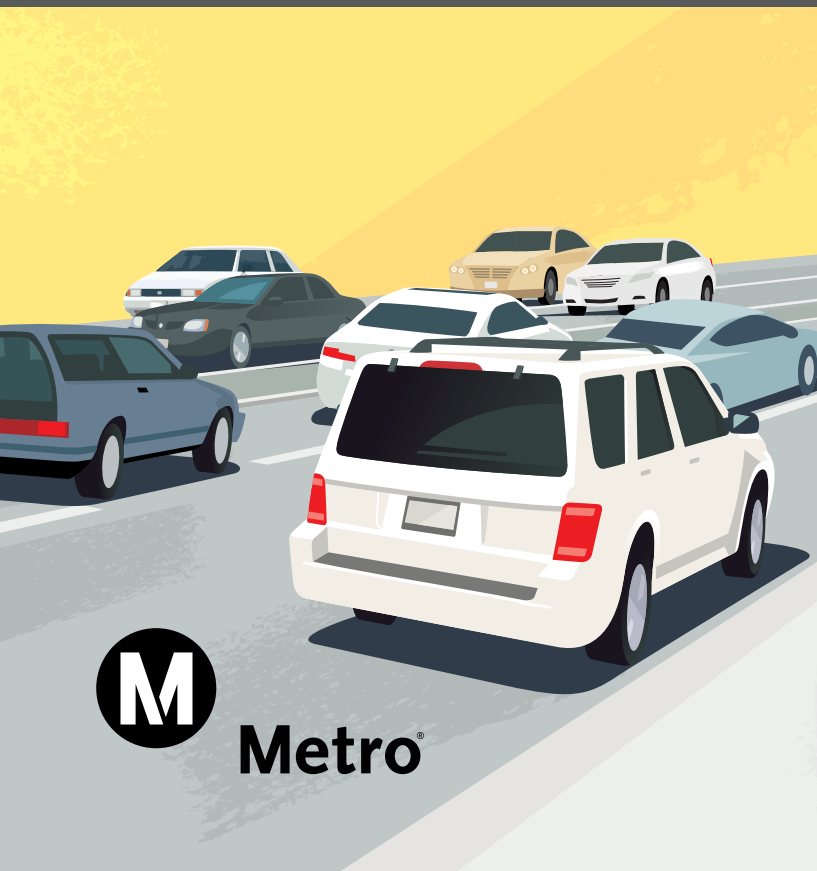


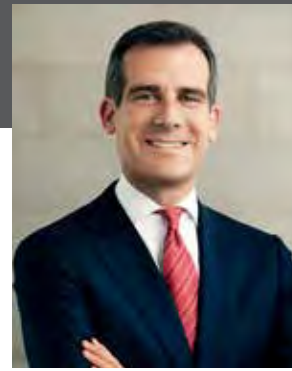


# HOW TO PASS A MEGA TRANSPORTATION MEASURE

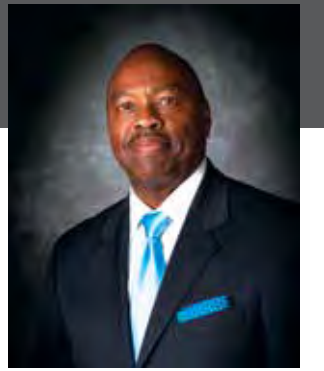
*LA COUNTY'S MEASURE M LESSONS LEARNED*



**Metro**<sup>®</sup>



## Foreword



One of the landmark achievements in the history of the Los Angeles County Metropolitan Transportation Authority (Metro), is the passage of Measure M – the Los Angeles County Traffic Improvement Plan. Following the overwhelming approval by LA County voters, we believe it is important to document how Measure M came to life and what we learned through the process. This Measure M Lessons Learned Report documents the three-year process of developing Measure M, and sharing what went well and what we would do differently. Measure M is nothing short of transformational for LA County. It is as grand a public works undertaking as bringing water from the Sierra Nevada to the Los Angeles basin, which made possible the region's growth and development.

This plan is a nonpartisan initiative by the 88 cities and unincorporated areas of LA County, the largest county in the nation, to tackle our crippling traffic problem. Measure M is a comprehensive multimodal transportation program that will address the mobility needs of today and lay a strong foundation for future generations.

The *bottom up* approach championed by former Metro Board Chair and long-time County Supervisor Michael Antonovich to elicit input from the county's cities and unincorporated areas ensured that all corners of the county had a hand in shaping the Los Angeles County Traffic Improvement Plan. As a result, Measure M is truly a regional plan.

It was a full team effort by the Metro Board of Directors, Metro staff, the county's nine subregions, and countless area partners led by the Los Angeles Area Chamber of Commerce, Move LA, BizFed, Valley Industry Commerce Association (VICA), Fixing Angelenos Stuck in Traffic (FAST), Investing in Place, the L.A. Federation of Labor, AARP, and other members of the business, environmental, faith, active transportation and philanthropic communities. The result is a comprehensive transportation plan of 40 transit and highway projects over the next 40 years and local transportation improvement programs that will transform LA County into the nation's transportation leader.

In a challenging infrastructure funding environment, and a required two-thirds voter approval, it is remarkable that Measure M passed by more than 71 percent – a resounding vote of confidence by the people of LA County.

Funding transportation infrastructure is a three-legged financing stool requiring support from the private sector, local and state funds, and federal dollars. If the federal government is looking for a funding partner, it can look to LA County, which goes to Washington with its hat half filled.

We often get asked, "How did you do it?" In short, the success of Measure M can be attributed to a collaborative bottom up process, early strategic planning, a broad and strong coalition of support, a widespread and robust public education program, and bold leadership by the Metro Board and Metro staff. Our lessons learned capture the things that went well and the challenges Metro and its partners faced along the way in the development and passage of Measure M. This report is for the residents of the county, other local, state and federal partners, and colleagues in the transportation industry who are interested in learning from Metro's successful Measure M initiative.

We want to thank the 70 plus Metro staff, Board Members and key stakeholders interviewed for the project who generously shared their perspective on how it happened, with a special thanks to Joel Epstein, who conducted the interviews and drafted the report for Metro.

On behalf of the Metro team, we are happy to share our Measure M Lessons Learned on how we are transforming transportation across LA County.

Eric Garcetti  
Mayor of Los Angeles and  
Metro Board Chair

Phillip A. Washington  
Metro CEO



# Executive Summary

It is essential that a region as large as Los Angeles County have a robust transportation system for people and goods movement. Unfortunately, LA's crippling traffic can be a hindrance to our economic vitality, impinging on the productivity of the county's large population and high level of business activity. Spanning 4,084 square miles, LA County is the world's nineteenth largest economy. Currently, the county is home to 10.1 million people and is projected to grow by another 2.3 million people over the next four decades. So, putting a plan in place that ensures adequate funding for public transportation and highways, active transportation and goods movement improvements is critical to the economic viability of the



**35%** to new transit construction, including 100 miles of Metro Rail and 65 miles of Bus Rapid Transit



**17%** to highway improvements, carpool lanes and goods movement



**20%** to bus operations



**17%** for local city transportation improvements



**5%** to rail operations

Measure M includes, for the first-time, dedicated funding for walking and biking improvements; affordable fares for seniors, students and the disabled; and state of good repair to keep Metro's system in good working condition. With other bike/pedestrian funding embedded in first/last mile connections to transit, walk and bike projects will receive six to eight percent of the Measure M total.

region. Equally important is that the plan was developed in a fair and equitable manner that took into account the diverse needs of the county's 10.1 million residents.

Beginning in 1980, LA County voters considered transportation sales tax initiatives to fund the building and expansion of the county's network of public transportation and freeway improvements. The grandest of these measures is Measure M – the Los Angeles County Traffic Improvement Plan. With the passage of Measure M in November 2016, LA County voters expressed their overwhelming support for a no sunset transportation sales tax that is estimated to generate \$120 billion in revenue over the next 40 years. Measure M commits:



**2%** for state of good repair



**2%** to keep fares affordable for seniors, students and the disabled



**2%** to active transportation projects



**1%** to Metrolink projects

Measure M was the result of a concerted nonpartisan effort to address LA County's daunting traffic challenge. What brought together the broad coalition of supporters and convinced more than 71 percent of the voters to Vote Yes on M, was the acknowledgement that the status quo was not a solution to our transportation woes.



## The Measure M Story

This is the story of Measure M – Los Angeles County's ambitious transportation sales tax initiative.

Measure M made history in November 2016 when 71.15 percent of LA County voters approved a no sunset ballot measure to fund an array of transportation projects and programs for today, tomorrow and for generations to come. But to fully appreciate the journey of Measure M, it is important to reflect upon the stories of Metro's Measure R and Measure J.

The result is a measure that provides Metro with a half-cent sales tax with a no sunset provision, and extends an existing half cent tax (Measure R) set to expire in 2039 to continue indefinitely.

The measure is the nation's single largest transportation infrastructure initiative, and ensures adequate funding for major transit and highway improvements to be built over the next 40 years, enhance bus and rail operations, undertake street improvements and repairs, and new safe, first/last mile connections throughout the county.

Measure M is many things to many people, including expanded transit, freeway and road improvements, lower carbon emissions and improved air quality, sidewalk repair, reduced fares for seniors, students and the disabled, bike lanes, first/last mile connections, more resources for Metrolink regional rail and jobs. The measure is also focused on state of good repair (SOG), the too often overlooked reality that our transportation systems and equipment will only benefit us if they are maintained in safe, working order.

# From Measure R to J to M

## LA's History of Transportation Initiatives

The history of transportation sales tax initiatives in Los Angeles County dates back nearly four decades. Measure M is part of a continuum of transportation sales tax initiatives in LA County aimed at funding Metro's expansion of public transportation and keeping county roads in a state of good repair (SOGR).

Proposition A, the first of these funding measures, passed in 1980 by majority vote. Prop A was a half-cent no sunset sales tax to generate revenue to begin building and operating the Metro rail system and bus projects. Prop A was LA County's first effort to address gridlock and mobility challenges in the county. One-fourth of the Prop A funds go to the 88 cities and unincorporated portions of the county in the form of "local return" for local transportation projects. Prop A has funded many critical transportation improvements and projects, including the Metro Blue Line from downtown LA to Long Beach, the Red Line from downtown LA to North Hollywood, the Purple Line to Western and the Metro Green Line.

Prop A was followed by Proposition C, which was approved by county voters in November 1990. Prop C was intended to support projects and programs developed with Prop A funds, and to help improve and expand the rail and highway systems in LA County.

California's enactment of a two-thirds vote requirement in 1996 was a big hurdle for Metro's efforts to further expand funding for county transportation improvements.

Still, in 2008 Metro went back to the voters and gained approval of Measure R, a half-cent sales tax to enable LA County to finance new transportation projects and programs, and accelerate those already in the works. Measure R, which took effect in 2009 and will expire in 2039, includes 35 percent for new transit construction, including the building of 100 miles of Metro rail and 65 miles of bus rapid transit (BRT), 20 percent for bus operations and 15 percent for local city improvements. Embedded in the measure is an independent Taxpayer Oversight Committee that oversees an annual audit report to taxpayers and ongoing monitoring and review of spending and borrowing to ensure that Measure R funds are spent in accordance with the plan approved by voters.

Measure R had some challenges: limited borrowing capacity due to its sunset date and project cost estimates that were not sufficient to meet community needs. So, in search of a means to expedite construction of transit and other transportation improvements, in June 2012, the Metro Board authorized placing Measure J on the November 2012 ballot to extend Measure R for 30 additional years. By extending the tax, Metro could expand its borrowing power and the ability to pay for projects over a longer period. This funding approach would allow Metro to accelerate the construction of transportation projects to deliver them sooner rather than later. But in the end, Measure J was narrowly defeated, falling just 16,000 votes short of the required two-thirds approval.

## Measure J's Failure & The Birth of Measure M

Then-Metro Board Chair and Supervisor Michael Antonovich had always said, "When Measure J fails, we will come back and do it the right way." He wanted to increase the investment being made in the northern part of Los Angeles County and elsewhere beyond the boundaries of the City of Los Angeles, but opposing a transportation sales tax measure when you are Metro Board chair is not an easy thing. When Measure J failed, Supervisor Antonovich realized the opportunity. If he could have it his way, any new sales tax was going to be driven by the geographic equity issues that the Supervisor and others had raised with Measure J. As one of the region's biggest champions of local control, Supervisor Antonovich saw the opening to help create a fair and equitable plan, that the community would get behind and he could support.

He wrote a letter to his colleagues on the Metro Board encouraging them to consider a "bottom up" approach to transportation planning and funding that would take into account the transportation wishes of the 88 cities and unincorporated areas of the county.

He knew that if he sent a letter to the 88 cities stating how a sales tax measure should be structured through a bottom up approach, it would carry weight. This was the beginning of Measure M's transparent and collaborative process.

**"Using the COGs was a way to capture regional priorities. Before, each of the COGs was having to pay for LA City-centric projects that didn't bring them any benefit. There was a great resentment of Prop A, even Measure R. It was like cotton candy, all fluff and no substance. But now, they were not ignored like they had been in the past, and having these communities at the table made for a better process."**

– Michael Antonovich  
Former Los Angeles County Supervisor  
and Metro Board Member

**"I tell people, Measure J was like being engaged to the wrong person and then the right one comes along. If we had gotten Measure J we never would have gotten Measure M and extended Measure R."**

– Michael Cano  
Former Transportation Deputy  
to Supervisor Mike Antonovich

**"What's the expression? The loser's an orphan and the winner has lots of fathers and mothers. No one wants to talk about Measure J."**

– Rusty Hicks  
Executive Secretary-Treasurer of the  
Los Angeles County Federation of Labor

## LESSONS LEARNED

### Find Opportunity in a Setback

The narrow defeat of Measure J was an opportunity to do things differently, with a "bottom up" approach to engage the county in the process of identifying projects across the whole county.

### Boost Borrowing Power

The agency's experience with its prior transportation sales tax initiatives taught Metro the importance of structuring the measure so it provided for adequate borrowing for project construction. This bonding capacity enables quicker buildout of projects by making more cash available early on.



# The Bottom Up Process

Gaining two-thirds of the electorate's support for a sales tax measure is a big lift. Measure R funded projects that a majority of greater LA voters wanted. The Gold Line Extension to Azusa, the Purple Line Wilshire subway extension, the Expo Line Extension to Santa Monica, the Crenshaw/LAX Line and the Regional Connector linking lines through downtown were all on the list. With this new ballot measure – initially dubbed Measure R2 – the task became identifying projects that were not already in the pipeline or under construction. Metro turned to the local communities for the projects they felt needed to be done most. Engaging the county's nine subregions and empowering them to identify the much-needed projects in their areas created buy-in from the start, and built the DNA framework for the plan.

## Learning from the Past to Build the Future

With his commitment to local control, LA County Supervisor and Metro Board member Mike Antonovich was a champion of working with the subregional councils of governments (COGs). Engaging with the COGs from the beginning would be essential, especially since many communities felt their areas were not equitably represented in Measure R. Most notably, the San Gabriel Valley, the North County and the San Fernando Valley, which felt that Measure R primarily benefited the Central and Western areas of the City of LA.

Supervisor Antonovich also recognized that with term limits coming in 2016, there needed to be tangible transportation benefits that transcended his term on the Metro Board, for decades to come.



## LESSON LEARNED

### Create a Bottom Up Process

Metro's "bottom up" approach of engaging all the subregions of the county was essential in developing a widespread and diverse plan of projects and improvements, and in creating buy-in and support at large for a new transportation measure.

# Building the Political Framework

Long before Measure M had its name, Metro recognized the importance of hearing directly from the different regions of the county about their transportation needs.

After Eric Garcetti was elected the new mayor of Los Angeles in 2013, the Mayor invited the 87 other mayors of the county to a July 2013 meeting at Getty House, the Mayor's official residence. The purpose of the meeting was to get acquainted and to discuss the future of transportation in LA County. While sizable, the City of LA represents about 40 percent of the population of the county, and Mayor Garcetti realized that it would take everyone rowing in the same direction to solve a problem as big as LA County's transportation woes. He worked hard to gain the trust of the county's other mayors, and it worked. With Mayor Garcetti's election and his ascendancy on the Metro Board, an important bipartisan alliance was forged between Republican County Supervisor Mike Antonovich and Democratic Mayor Eric Garcetti.

As Metro Board chair, Supervisor Antonovich reached out to Mayor Garcetti and Supervisor Mark Ridley-Thomas. Despite their different political stripes, the three leaders built a strong connection and worked together for the good of the county. Supervisor Antonovich's support for the notion that, "We do it fairly and rationally" dovetailed with Mayor Garcetti's perspective that what is good for the region is good for the City of LA. As a result of the Board embracing the pursuit of another ballot measure through a bottom up process, the framework and principles for a new plan were in place.



From left to right: LA County Supervisor Mark Ridley-Thomas, LA Mayor Eric Garcetti, and County Supervisor Michael Antonovich.

**"People call it coalition building, but it's about humility. It's reaching out to your partners to achieve a collective objective like Measure M."**

– Mayor Eric Garcetti  
Mayor of Los Angeles and  
Metro Board Chair

## LESSON LEARNED

### Foster Bipartisanship

Coalition-building between Republicans and Democrats is paramount to the success of a sales tax ballot measure. Tackling traffic congestion is a universal agenda. The responsibility of improving transportation belongs to everyone.

# Building the Project List

The bottom up process with the councils of governments (COGs) had a head start with some work already underway by the Gateway Cities COG, one of the county's nine subregions. The group, which represents two million residents of Southeast Los Angeles County, had begun a bottom up-type inventory of its transportation priorities so they could express their needs to Metro in a unified voice. Metro staff and the Board recognized that what was needed countywide was a similar inventory that captured the needs of all the COGs.

At the end of 2013, the Metro Board directed that a holistic countywide "Mobility Matrices" approach be developed to assess the county's transportation needs. In February 2014, the Board approved the approach whereby subregional working groups would develop goals for analyzing unmet county transportation needs. With the blessing of the Metro Board, Metro's Planning Department replicated the Gateway Cities COG project inventory process to apply it countywide.

In a public opinion survey conducted by Metro in Spring 2015, the majority of the respondents indicated they might support a new ballot measure. They also weighed in on the importance of particular projects already included in Metro's Long Range Transportation Plan. Metro staff and a team of consultants then worked with the COGs to analyze and prioritize transportation projects in their respective areas.

The Planning Department's charge was to develop a collective list of projects that would become the framework for a new plan of geographically equitable transportation projects throughout the county. The Planning staff developed a ballot measure framework with project

## LESSONS LEARNED

### Partner with the COGs

Engaging the county's communities in the process from the start gave the entire county skin in the game and made the county's 88 cities Metro's partners. Empowering the COGs to select their area projects generated the inventory of transportation priorities at the local level and helped Metro identify the diverse transportation needs of the county.

### Establish a Mobility Matrix

The mobility matrices developed by the COGs allowed them to determine their own community transportation priorities and provided Metro with a holistic countywide means of assessing and identifying the region's diverse transportation needs.

and program categories. In addition, the staff provided its subregional partners with a number of tools to support the decision-making process, which included updated subregional boundaries, optimal capital improvement targets for each subregion, project specific benefits and cost estimates, and a subregional project priority submittal form.

Each COG crafted a list of projects they believed were a priority for their subregion. When Metro compiled the list, it was a two-inch thick book of 2,300 projects totaling about \$274 billion – more than double the initial estimated \$120 billion generated over the 40-year plan. That list of projects had to be whittled down to meet each subregion's monetary targets. So, Metro staff provided each subregion with an equity target based on either current population, future population, current employment or future employment – whichever category most benefitted each subregion. The process ultimately resulted in a project list that met the expected revenue generated by the tax measure, and more importantly, it was emerging as a plan from the people for the people.

**"Nobody wants to buy a pig in a poke...something cooked up in some politician's basement."**

– Gary Toebben  
CEO and President,  
LA Chamber of Commerce

### Allow Flexible Subregional Targets

Metro allowed the COGs to build their list of projects based on one of four targets – whichever benefitted the COGs most: current population, future population, current employment or future employment. This was a lesson learned from Measure R, and recognized the subregions for their uniqueness in the category where they performed best.

### Provide Tools to Stakeholders

Metro Planning provided tools to assist stakeholders in the difficult task of identifying projects for their subregional project list. The tools included things like project specific benefits, project cost estimates, a project priority submittal form and optimal targets for each subregion.

# The Enabling Legislation

Having the desire and political will to consider a ballot measure was part of the equation, but having the legal ability to establish a new transportation sales tax was the other half. With the cap on local sales taxes, Metro had to pursue authorizing legislation through the California State Legislature. Metro staff began working with County Counsel and specialized counsel, Reed & Davidson, LLP, in late 2014 to identify the exact structure and language of the statute that would be needed.

One of the goals identified early on was to structure the language to preserve flexibility in the local bottom up process to decide which projects to fund. Also important was allowing the Metro Board to determine other key factors about the tax, including the term and rate.

In 2015, Metro chose to advance legislation to solidify the authority to pursue the tax increase. Metro Government Relations staff began working with the Metro Board to identify potential authors for the legislation. The goal was to secure an author in a leadership position who also supported infrastructure funding and the local process. Senate President Pro Tempore Kevin De Leon was identified as a good possible author, and ultimately, he carried the bill – Senate Bill 767 – through to approval.

SB 767 established the basic authorization for Metro to place a sales tax measure on a future ballot and set the basic requirements for the measure.

- Authorizes new 1/2 cent sales tax.
- Upon the expiration of the 1/2 cent Measure R (passed in 2008), augments and extends the tax to a full cent.
- Requires an expenditure plan that lists the projects and programs to be funded.
- Requires the expenditure plan to be part of the ordinance as an exhibit.
- Establishes a 1.5 percent limit on the amount Metro can use for administrative costs.

To ensure transparency to the public, SB 767 also required Metro to do two things:

- Develop a transparent process to determine the most recent cost estimates for each project and program identified in the expenditure plan.
- At least 30 days before submitting the ordinance to voters, post the expenditure plan in a prominent manner on Metro's website.

Metro's team mapped out the legislative process to identify the committees of jurisdiction. This allowed the team to prepare a briefing schedule for legislators and their staff who were integral to the process. The Government Relations team worked with external stakeholders – business, environmental and labor groups to name a few – to support Metro in the legislative process.

## LESSONS LEARNED

### Start Early

Pursue legislation well in advance of the local process to determine the structure of the measure. This is important to preserve the integrity of the local process and to ensure that the subregions had full involvement.

### Use Experienced Counsel

Engage specialized counsel with expertise in sales tax ballot measures and election law to draft the sales tax ordinance and guide the agency through the electoral process.

# Listening to “The People”

In 2013, after Measure J failed, Mayor Garcetti’s office conducted a post-election survey. Metro also conducted both surveys and focus groups as part of its information gathering for a potential ballot measure. During post-election surveys on Measure J, it was clear that there were some misconceptions by the public. For example, some thought that Measure J was about California High Speed Rail. Metro knew it was important to lay the foundation for accurate information early on, while also testing how people feel about traffic, transportation options and what Metro was trying to do about it.

As part of the effort to gauge the public’s appetite for a new transportation sales tax, Metro conducted a public opinion survey in Spring 2015. Given the cost and effort involved in putting a sales tax measure on the ballot and having to achieve a two-thirds approval, Metro went to the people to see if such a tax stood a chance with the electorate.

**“You can be as idealistic as you can be but if you come up with only 65 percent of the vote, your ideas go back up on the shelf and gather dust.”**

– Steve Hymon  
Editor of Metro’s blog, The Source

To prepare for the survey, Metro held focus groups in February 2015 to help shape the survey questionnaire. Some of the main points expressed by participants included that traffic congestion is considered a serious problem and it is getting worse due to the growth in population and drivers on the road. They also believed that there is a need for new funding and that the public transportation system needs to be better connected.

## LESSONS LEARNED

### Survey the Public

Metro’s Spring 2015 survey suggested that county voters would support a new transportation sales tax on the November 2016 ballot. This finding suggested to the Metro Board that it was worth continuing to explore the possibility of an initiative.

Survey respondents also said that the plan must include a package of local roads, freeways and public transit projects. Overall, the results of the survey were encouraging for Metro. More than two-thirds of those surveyed said they would support a ballot measure with a new tax and a possible extension of the half-cent Measure R tax.

As a follow-up to the March 2015 survey, Metro conducted a series of focus groups in September 2015 to see how “the people” felt about a sales tax measure and to test how phrases and graphics resonated with focus group participants.

Through the focus groups, Metro found, not surprisingly, that voters despised traffic, and Metro generally earned high ratings for favorability. In terms of the ballot measure, it might not be viewed as a silver bullet, but at least it was perceived to offer the county “traffic relief.”

The transportation improvements that resonated most with respondents included traffic congestion relief, freeway improvements, keeping fares low for seniors, the disabled and students, bridge and tunnel safety improvements, and pothole repairs and repaving local streets.

Support for a transportation ballot measure appeared relatively strong among survey respondents, slightly above the two-thirds threshold. This research served as an encouraging sign for pursuing a ballot measure in November 2016.

**“You should not underestimate the value of listening to external voices, as well as to those on board with the plan.”**

– Stephanie Wiggins  
Deputy CEO, Metro

### Conduct Focus Groups

Focus groups provided a deeper level of information to the agency and Board on what was important to the public, the messages that resonated most, where Metro needed to focus its energy, and the prospects for a successful November 2016 ballot measure.

# Developing the Messaging Platform

In addition to Metro’s robust bank of survey and focus group results from LA County voters, the agency conducted a social media survey to further assess the public’s appetite for another sales tax measure and test words, phrases, concepts and graphics. This online public opinion effort further refined Metro’s presentation of accurate, fair and impartial facts to aid the voters in reaching an informed judgement regarding the potential ballot measure.

Some of the nuanced words scored very high, some not so much and some not at all. While Metro is not allowed to advocate for a ballot measure or run an advocacy campaign, the words, phraseology and graphics that resonated with the public laid the foundation for Metro to build its messaging platform for its public education program. In its research Metro found that participants didn’t believe that Metro could *solve* traffic or even *reduce* it, but they believed that Metro could *ease* traffic. The research suggested that with the economy stronger than it had been during Measure J, Los Angeles was back to focusing on “traffic relief” rather than creating jobs, which had been a key focus of Measure R.

The public also told Metro that they would vote for a tax if they knew that Metro had a *plan* for the county. These were the seeds that gave birth to the Los Angeles County Traffic Improvement Plan – the overarching name of Metro’s plan – and the drumbeat that Metro could *ease* traffic.

The surveys and focus groups also told Metro that money for “local return” was important among voters – funding that would go back to the county’s 88 cities for their own local transportation projects. Fixing local streets, potholes and sidewalks ranked high among the public. And knowing what major transportation improvements people could expect in their own areas was also important.

In the focus groups, Metro heard from participants that, “We’re not going to fix traffic, but *easing* traffic is believable.” With these results, Metro built its messaging platform, a comprehensive public education program which included billboards, bus and rail ads, bus shelters, social media, newspaper ads and more. The messaging focused on Metro having a “plan to ease traffic,” so before the ballot measure was titled Measure M, Metro referred to its plan simply as the Los Angeles County Traffic Improvement Plan.



## LESSONS LEARNED

### Listen

One of Metro’s most important lessons is to listen to its customers – the public. Listening was critical to the way Metro communicated to the public about Measure M.

### Invest in Research

Surveys and focus groups help develop a robust bank of information about voter sentiments that is invaluable in crafting a messaging platform.

### Target Your Messaging

Customize messaging to show residents what is in it for them in their area – whether fixing potholes, building light rail or fixing freeways, or making better bike and pedestrian connections.

### Use Data to Frame the Platform

Make effective use of survey and focus group findings to draft the enabling legislation and ultimately shape the education and public information program.

### Drive Home Local Return

Local return was critical. It meant that the entire county had skin in the game. That allowed Metro to go to every community and when they said, ‘Where are the local programs?’ it could point to subregional fact sheets to show there was something directly in it for them.

### Make it Regional and Personal

Regional, big picture messaging that applies to the general populous is critical. However, as important is targeted messaging to tell people the local benefits that Measure M will deliver in their area or for their particular areas of interest.





Once Metro and its local partners across the county developed a list of projects for regional transportation needs, the next challenge was determining the project order – a monumental and political process. CEO Phil Washington initiated a process to evaluate projects through a set of performance metrics as a method of ranking the projects to guide the sequencing. Staff established five metrics with detailed data points to analyze each of the transit and highway projects for how well they performed in delivering improvements in five main areas:

- Mobility
- Accessibility
- Safety
- Economy
- Sustainability & Quality of Life

*Consumer Reports*-type Harvey balls scoring was used in comparison tables to indicate the degree to which a particular project met a particular criterion. The flexible assessment mechanism, based on both quantitative and qualitative metrics, provided an effective way to evaluate projects.

**“I call it the ‘sacred sequence,’ which goes first, second and third, and prevents leapfrogging over projects. It was performance-based.”**

– Heather Hills  
Former Director of Long Range Transportation Planning,  
Metro

As a result of the bottom up performance-based approach, the back and forth over what the final project would look like was more collegial than it had been on prior initiatives. Even among the groups that advocate for safe and livable communities and supports transportation investments that strengthen communities, their concerns were couched in research and were constructive rather than a slay the dragon in public meetings approach.

## LESSONS LEARNED

### Establish Performance Metrics

Metro’s flexible assessment mechanism, based on both quantitative and qualitative metrics, provided an effective way to evaluate projects and indicate the degree to which a particular project met a particular criterion.

### Get Input on the Metrics

Offering stakeholders the opportunity to provide input on the performance metrics refined the data points and further extended the openness and collaboration of the process.

Still, the allocation of resources and the sequencing of projects was a tedious process because everybody wanted more projects sooner in the Measure M timeline. The ultimate “no-sunset equals acceleration through borrowing” approach did not make the sequencing problem go away, but it helped and was critical to Measure M’s success.

Metro was careful to apply the performance metrics, which included environmental justice and quality of life for disadvantaged LA County communities to ensure delivery of a thoughtful and comprehensive plan that was inclusive to the whole county.

Phil Washington set an aggressive schedule for the modeling of the transit and highway projects. Metro’s Planning Department was tasked with delivering the performance assessments on the 15 major transit projects and 10 major highway projects. Though it would normally take six to eight weeks to perform a travel demand model run and at least an additional week to do the individual transit and highway performance analysis, Metro staff and consultants completed its analytic work in two weeks.

Metro offered stakeholders an opportunity to provide input into the performance metrics, which further extended Metro’s openness and transparency in its process. Staff made some modifications to the metrics, such as adding data points for how well projects provided economic benefit by investing in projects in disadvantaged communities, and accessibility to parks and open space, as examples. Stakeholders also gave feedback on the weighting that should be applied to each of the five metrics.

Metro staff brought the performance metrics to the Metro Board in November 2015, a full year before the actual November 2016 vote and before the Metro Board ever saw the project list. Approval of the metrics would guide the project sequencing, which would become the foundation of the draft expenditure plan. In addition to the transit and highway projects the list included the multi-year subregional projects. Metro’s blog, *The Source*, assembled the list of Measure M projects that resulted from the performance evaluation process and the sacred sequencing.

### Legitimize the Sacred Sequence

Using a performance-based approach to rank each major project resulted in a sequencing of the list of projects that the region could embrace. While some stakeholders were not pleased that their projects were listed later in the program, “the sacred sequence” was based on solid data – not random decisions.

Metro’s process for pursuing a new sales tax measure molded into a draft plan. The major highway and transit projects accounted for just over half of the plan, but many other components rounded out the overall program. A working group, including outside stakeholders like municipal operators, Metrolink regional rail and Access Services, was facilitated by Metro’s Office of Management and Budget. The group worked through the needs for the other components of the program. The outcome of the project modeling and sequencing combined with the programming of the other elements resulted in a comprehensive draft expenditure plan:

- 35 percent for new transit projects
- 20 percent for bus operations – including Metro bus and municipal bus operations
- 17 percent for new highway projects – including freeways, toll lanes, and port and goods movement projects
- 16 percent for local return – per capita funding to municipalities for their own local transportation projects
- 5 percent for Metro rail operations
- 2 percent for ADA paratransit service and to keep fares affordable for seniors, students and the disabled
- 2 percent for Metro state of good repair and safety improvements
- 2 percent for regional active transportation projects
- 1 percent for regional rail – Metrolink projects

In March 2016, CEO Washington presented the draft expenditure plan to the Metro Board, which would generate an estimated \$120 billion over the first 40 years. But what was originally intended as a 40-year plan was proposed as a 50-year plan.

While generating the draft expenditure plan, Phil Washington asked staff to model a 45-year plan and a 50-year plan to see how Metro could leverage the additional bonding capacity of a longer duration plan to get more projects completed sooner than anticipated in the 40-year plan. Ultimately, the March 2016 preliminary staff recommendation was a 50-year comprehensive plan to fund a variety of ways to improve mobility across LA County. There were some nuances of the plan worth noting:

- While the expenditure plan included two 710 South Freeway projects, it did not include funding for the controversial 710 North Freeway tunnel project due to a lack of consensus on how to proceed with the plan to connect the 710 North with the 210 Freeway.
- The draft plan included funding early on for Metro Orange Line BRT grade crossing upgrades and the line’s eventual conversion to rail.
- It contained an extensive plan for the Sepulveda Pass. Initially HOV lanes would be converted to ExpressLanes with toll revenue helping fund a rail tunnel connecting the San Fernando Valley with LA’s Westside – a concept that polled well.
- The plan included two percent in funding for pedestrian and bicycle projects, something not seen in Metro’s past ballot measures.
- Under the plan, the downtown Los Angeles Streetcar would receive funding.



Metro CEO Phil Washington fields questions at a public input meeting.



# The Draft Plan

## State of Good Repair (SOGR)

From a policy perspective, the focus in the plan on state of good repair was noteworthy given Metro's shift from an age-based asset management approach to a more forward-thinking condition-based asset management program, where boots on the ground would periodically inspect and report on the actual condition of an asset. To ensure that Metro is able to keep its system in good working condition, the draft expenditure plan provided for preventative maintenance and repair of its buses and trains and related infrastructure improvements, also signaling a first for any Metro expenditure plan. At the same time Measure M went to the ballot, the Bay Area Rapid Transit (BART) pursued a tax increase specifically for state of good repair.

Many of those interviewed for this report give Phil Washington high marks for including in the plan unsexy state of good repair. While from a local city's perspective, that may seem like Metro taking money off the table for its projects, the messaging from the CEO was, "We have to invest in our system, or like a neglected house, it will start to fall down." State of good repair was positioned as an investment in good service delivery, safety and quality of service.

Meetings with the media were essential in the view of Washington for education and outreach about the concept of state of good repair and ultimately to the success of Measure M. At meetings with the editorial board of the *L.A. Times* and others, Washington provided perspective on the plan and the reasoning for state of good repair.

## LESSONS LEARNED

### Consider a Longer Time Horizon

Metro's draft plan shifted from a 40-year plan to a 50-year plan, which is what Metro staff initially recommended to the Metro Board. The extension would provide more bonding capacity to get more projects completed sooner than in a 40-year plan.

### Elevate State of Good Repair

State of good repair isn't sexy like a new rail car, but it is critical to the success of any agency's transportation system. Reliable service delivery, safety and quality of service are the three legs of the state of good repair stool that keep a system in good working condition.

The *L.A. Times* editorial on state of good repair articulated the fundamental change for Metro and the Metro Board to elevate state of good repair as a component of the measure.

Phil Washington believes that blind adherence to an age-based model is partly why systems in this country got in trouble. Some accepted at face value that a bus has a 12- to 14-year life span and little consideration was given to the actual condition of the bus. Nationally, the idea of creating a condition-based system is growing. APTA, the American Public Transportation Association, had discussed it during Phil Washington's chairmanship with the organization, and more progressive transit systems are now going to a condition-based approach. New York City's 2017 *summer of hell*, the result of decades of deferred maintenance and the widely reported difficulties that the Washington, DC Metro system experienced, also confirm the importance of moving to a condition-based approach.

**"It's true that voters like the shiny stuff. It's hard to put the ribbon on a rebuilt engine. But I say, you wouldn't buy a new car and never change the oil. You have to work on the thing, you check the oil. That message resonated with folks."**

– Phil Washington  
CEO, Metro

### Schedule Media Briefings

Briefings with the media are essential to educating the public about the plan, and specifically, the concept of state of good repair.

# The Public Weighs in on the Draft Plan

Now, it was time to see what the public thought about the draft plan. Metro began a robust public input process that included telephone town hall meetings, traditional public meetings, social media, and presentations to city councils and community groups throughout the county.

Starting an education program early on and getting input from the public and other interested parties are key to the success of programs like Measure M. It was important to educate the public about the various components of the plan and describe how the projects were determined and sequenced. Equally important was writing a sound-bite that clearly articulated how the plan was developed – a plan from the people for the people, and the people will decide.

"The status quo in many situations is the enemy of progress," explains Gary Toebben of the LA Chamber of Commerce, "so you have to convince the public that there is no such thing as the status quo. If you vote NO, the situation will be worse tomorrow."

After the initial spending plan was released in March 2016, Metro conducted a robust public input process over several weeks that included 12 community meetings with live electronic polling among meeting attendees; 14 telephone town hall meetings, a new approach for the agency; and online engagement to elicit input from the public and learn about voter concerns. Initially, some of the Metro Board members were apprehensive about participating in the telephone town halls, but Metro moved ahead. Board members saw the value of these live, large telephone town halls as an effective and convenient addition to traditional public meetings that don't reach nearly the number of people. In all, Metro engaged an estimated 75,000 people through the telephone town halls, something that would not have been possible through physical public meetings.

As part of its public input process Metro staff also attended and/or spoke at 84 meetings of cities and stakeholders. The process elicited 1,567 written comments and 91 letters from elected officials and other key stakeholders.

## LESSONS LEARNED

### Educate Early

Starting an education program early on to help the public digest the plan was a key element to the success of Measure M.

### Let the Public Weigh In

Providing stakeholders and the public with an opportunity to react to and comment on the draft plan built broad public support for and buy-in of the plan.

Crafting a strategic education and outreach program was a team effort. Metro's Communications staff expanded their brain power by including two strategic communications consultants with extensive local experience in the planning of their approach, development of messaging, wordsmithing, media relations strategy and dynamic traditional and digital communications. One consultant, a former Metro Chief Communications Officer during the passage of Measure R in 2008, and a former Director of Communications for LA Mayor Eric Garcetti, provided considerable institutional know-how about past missteps on tax measures, and the ins and outs of LA County and local politics to Metro's Communications team, whose leadership had largely turned over when Phil Washington took over as CEO. The team's combination of fresh faces and ideas with historic local know-how was the force behind Metro's education and public input process, which gave the people of the county a voice in their transportation future.



Metro Board Member and LA County Supervisor Mark Ridley-Thomas participates in a live telephone town hall meeting.

### Use Telephone Town Halls

Finding new ways to reach residents was critical to Metro's education and outreach. In all, Metro engaged with an estimated 75,000 people through the telephone town halls, something that would not have been possible through traditional public meetings.



# The Final Plan



**“Forty-two years of accelerated construction, a sustainable funding source, a focus on state of good repair, it was like Christmas, and I give all credit to the Metro Board for going with this. I’m sure that they were all terrified like me. Nothing really keeps me up at night. I like to keep other people up at night. That’s the one thing that worried me, the no sunset discussion.”**

– Phil Washington  
CEO, Metro



# The Final Plan

After Metro received widespread input between March and May 2016, now it was time to “tweak the plan,” as Phil Washington coined it. His feeling was, if you have the mindset that you are not going to make any adjustments to a plan and are not open to any adjustments, you are looking at a deal breaker.

Metro staff synthesized the comments received through the public input process and evaluated how the feedback could enhance the plan. One major change was increasing the funding for Local Return from 16 percent to 17 percent with the extra one percent shifted from Metro’s allocation for its own administrative costs to implement the Measure M program. Metro also committed to increasing Local Return to 20 percent starting in 2040 – a move that helped satisfy some of the critics who wanted more funds for the cities to do their own projects like pothole and sidewalk repairs, traffic signal synchronization, bike lanes and the like.

**“The Local Return piece was key, too. The entire county had skin in the game. That allows you to go to any community and when they say, ‘Where are the local programs?’ you can point to the subregional fact sheets. They want to see themselves in it.”**

– Phil Washington  
CEO, Metro

The final plan also tweaked the funding commitment for Regional Rail, inter-county commuter rail operated by Metrolink. Language was strengthened to increase the original allocation of one percent to two percent in 2040, provided Metrolink meets specific performance standards.

But the most significant change from the draft plan to the final plan was a shift from the previous staff recommendation of a 50-year plan to a *no sunset* plan. During the public input process, the most common comment expressed was a desire to get more projects done sooner. Staff conducted extensive analysis on how much more the agency could deliver over a 40-year period without the limits of a tax that would sunset. With more bonding capacity and funds to leverage, Metro found it could get 40 major transit and highway projects done within 40 years – 18 in the first 15 years.

In May 2016, Metro conducted a public opinion survey of likely voters that included questions about a 50-year sales tax measure and a no sunset tax measure. Interestingly, respondents showed more support for the no sunset plan than the 50-year plan.

**“I remember when we first pitched the idea of testing the no sunset scenario. Although it was risky and a lot of people didn’t think it was possible, once it polled well, it opened the door for us to pursue an ongoing, sustainable tax plan.”**

– Borja Leon  
Director of Transportation, LA Mayor’s Office

## One-on-Ones with the Metro Board

A key part of Phil Washington’s outreach strategy was face-to-face meetings with Metro Board members. CEO Washington, Deputy CEO Stephanie Wiggins and some of the technical staff held individual one-on-one meetings with Board members to gauge their feelings about the “tweaks” to the proposed plan – namely the shift to a no sunset tax. The polling results provided a convincing vote of confidence that there was a public appetite for an ongoing, local investment in transportation.

Metro tweaked the plan – a very important part of the story of how Metro got to the “no sunset” decision. According to Metro’s former Senior Executive Officer of Countywide Planning David Yale, “no sunset” was the biggest decision Metro made, and it had a great benefit because the borrowing you can do on a *no sunset* program is much greater than with a sunset provision. Another critical decision in addition to adding a new, perpetual half-cent tax was extending Measure R indefinitely beyond its initial 2039 sunset. Comprehensive assessments every 10 years requiring a super-majority vote of the Metro Board were added to balance the no-sunset provision.

**“It’s easy for GMs and CEOs to focus on a subset of their board. But the psychology of Phil Washington meeting one-on-one with all the Metro Board members, making them ambassadors, I think that’s so important to the campaign’s success. Organizations tend to underestimate the importance of the one-on-one briefings, but we actually made changes to the plan based on those briefings.”**

– Stephanie Wiggins  
Deputy CEO, Metro

In June, the CEO presented the final plan to the Metro Board that would ask county voters to support a new half-cent transportation sales tax and extend the existing Measure R half-cent sales tax – all until voters decide to end the tax. The goal of the plan was to ensure a sustained funding stream for county transportation projects that would benefit the region’s mobility, residents’ quality of life and the regional economy in perpetuity.

A late push came from some stakeholders in the San Fernando Valley to include a bus rapid transit (BRT) line on Nordhoff Street to Cal State Northridge (CSUN). Metro representatives met with the BRT advocates to see if the sides could arrive at a compromise that would fit within the plan. As a result, when the tweaked and final plan went before the Metro Board for approval on June 23, 2016, the Board passed a motion to allocate \$180 million for the CSUN BRT project. To maintain equitable treatment across the county, then-Chair John Fasana introduced a subsequent motion to earmark a proportional amount of money for projects in each of the other subregions of the county. The BRT funds are included in the system connectivity category of the expenditure plan. This was yet another way Metro kept equity across the county at the forefront.

## A Cohesive Metro Board

Metro watchers and employees credit the Metro Board for its collaborative approach to the crafting of Measure M. As widely noted, Supervisor Mark Ridley-Thomas and Duarte Mayor John Fasana as respective Board chairs, along with LA Mayor Eric Garcetti, played critical roles in keeping the Board focused on the end game. And with conservative Supervisor Antonovich saying, “Now we have an LA Mayor who is a true regionalist,” and “I’m good with the plan,” Measure M had the makings of a truly nonpartisan and cohesive undertaking.

Those in attendance at the Board meeting the day of the vote on Measure M recall waiting with anticipation and when Supervisor Antonovich responded in the affirmative, in such an understated way, many breathed a sigh of relief.

Former South Bay County Supervisor Don Knabe and Lakewood City Councilwoman Diane Dubois were the only dissenting votes mainly because they wanted to see major projects in their communities completed earlier in the plan. But Washington and others credit Supervisor Knabe; while he didn’t support the measure, he did not go out and vehemently oppose it either. As a point of comparison, on Measure J, the Metro Board was so divided, the Board would not even agree to allocate the funds for the educational outreach and Supervisor Antonovich authored the opposing ballot argument for the Measure.

**“You have to know when to do this. Some of it was luck, but there was good planning too, and we recognized what we had done wrong in the past. We were able to make the case that if Measure M failed and there was no funding, your project was not going to start at all.”**

– John Fasana  
Duarte Mayor and Former Metro Board Chair

# The Ballot Language

Working once again with its survey and focus group consultants, Metro tested various words and phrases in another round of focus groups in April 2016 before drafting of the ballot language. Critically important to drafting the language for the November ballot was listening, once again, to the people. Metro's staff and consultants worked through a tedious wordsmithing exercise to not exceed the 75-word statutory limit for ballot language, adding three words, deleting two. Adding two words, deleting one, checking it for legal compliance, then ultimately arriving at the following language:

***“To improve freeway traffic flow/safety; repair potholes/sidewalks; repave local streets; earthquake-retrofit bridges; synchronize signals; keep senior/disabled/student fares affordable; expand rail/subway/bus systems; improve job/school/airport connections; and create jobs; shall voters authorize a Los Angeles County Traffic Improvement Plan through a ½¢ sales tax and continue the existing ½¢ traffic relief tax until voters decide to end it, with independent audits/oversight and funds controlled locally?”***

Ballot word choice was critical. Even if one never hears the campaign ads in support of Measure M, but goes to vote and reads the ballot language, you want them to have enough factual information to vote YES. Every word has to count and be factual. The ballot title and summary, the choice and order of words, and the duration of the tax are critically important, as are the public outreach and education.

***“When we started the research we were not even close to two-thirds, but as we reworked the ballot question and honed the message, the numbers began to move up. If I were only to ask the question once, we wouldn't have gotten to two-thirds. We only got there through education and outreach.”***

– Richard Bernard  
Partner and SVP,  
Fairbank, Maslin, Maullin, Metz & Associates

## Until Voters Decide to End it

The wordsmithing for the ballot measure was critical and through a team that included pollster FM3 led by Richard Bernard, communications consultants Matt Raymond and Yusef Robb (before he joined the Yes on M Campaign), and Metro's Communications Team led by Chief Communications Officer Pauletta Tonilas, the group held bi-weekly strategy meetings. It was during those meetings that the ballot language came to life, including the finessed wording of how to refer to the *no sunset* tax:

***“Until voters decide to end it.”***

Measure M's critics seemed to take pleasure in taunting Metro about the *no sunset* provision. While even within Metro there were doubters, the research showed that 72 percent of the people supported a “no sunset” provision and it polled higher than the 50-year sunset proposal. This gave the Metro Board and the CEO the support they needed to courageously pursue a “no sunset” sustained funding plan.

## The Ordinance

The Measure M Ordinance is the guiding document that dictates how the measure will be administered. From how funding will be allocated to the various elements of the program, to the formation of a Taxpayer Oversight Committee to oversee the implementation of the program, the ordinance is the detailed bible for administering funds and requirements associated with Measure M. Built into the ordinance is a process to recalibrate the overall program every 10 years. With the bottom up process and the chance for periodic review of the program list, the ordinance assured protections and geographic equity for all cities. Unable to predict all the county's needs in the coming decades, the ordinance factored in a process for the Board to vote on changes to the plan over time.

With a final plan, an ordinance, official ballot language and fledgling public support now in place, the Metro Board of Directors voted 11 to 2 on Thursday, June 23, 2016, to place the Measure M sales tax measure on the November 8 ballot. Los Angeles County residents would be asked to support a variety of transit, highway, bike, pedestrian and local transportation projects dubbed the Los Angeles County Traffic Improvement Plan.

## LESSONS LEARNED

### Control the Message

Tweaking the plan allowed Metro to control the message, presenting small changes to the plan as noncontroversial adjustments.

### Cultivate the Board Relationships

Fostering a Board that works collaboratively to find solutions to problems that inevitably arise is also critical.

### Embrace Decorum and Mutual Respect

Under Phil Washington's leadership, the Metro Board was treated with the utmost respect. A new CEO who made the effort to reach out one-on-one to the Board helped the process as did the willingness of a sometimes divided Board to pull together in the same direction for the sake of the county.

### Keep the Good News Flowing

Measure M was about educating the public on the county's need for a comprehensive transportation infrastructure building program. To achieve this, CEO Phil Washington understood the importance of publicizing the accomplishments Metro was already making through local investment.

### Test the No Sunset

A *no sunset* initiative “Until voters decide to end it” proved that indeed, hard work and fortune favor the bold.

### Pick the Right Words

Testing the public's reaction to things like filling potholes and keeping fares affordable for seniors, students and the disabled, helped Metro craft the ballot language. With a 75-word limit, every word had to count and was critical to the success of Measure M.



# Building the Coalition

Measure M's success was the result of a confluence of good politics and good policy and it was the right thing to do for the county. City Councilmember Mike Bonin of the Metro Board puts it this way:

*"This is an initiative that has a lot of mothers and fathers" and every step along the way inspired additional confidence in the ultimate product and a YES vote."*

It takes a strategic and devoted team to build a transportation system for the 88 cities and unincorporated areas of Los Angeles County, the world's nineteenth largest economy. David Yale, a 30-year veteran of Metro's Planning department and a central figure in Measure M's development, counsels that to develop and win support for a program of this sort, "You are going to need a deep bench of resources and consultant support and political champions that can bring those resources to the fore." Measure M was blessed with all of the above.

The historic number of transit-related funding initiatives that voters across the nation approved on November 8, 2016, attests to the public's commitment to expanding public transportation. Measure M's passage is even more striking as many LA County residents are still beyond easy reach of transit options. Writing about the November 2016 transportation ballot measures in Mass Transit, Diana Mendes notes, this "suggests that... [L.A. voters'] grasp of the system's employment, economic and tax benefits is strong."

Critical Measure M campaign partners include AARP, the Los Angeles Area Chamber of Commerce, Move LA, BizFed, VICA, Fixing Angelenos Stuck in Traffic (FAST), Investing in Place, the L.A. County Federation of Labor, and other members of the business, environmental, faith, active transportation and labor communities. The partners demonstrated that they could look beyond political differences and sometimes bad blood to unite behind a plan that would benefit all of the residents of the county whether they drive or ride a bus or train to work, or live in the City of LA or out in an unincorporated area of the county. For some, partnering with Metro seemed to stem from

## LESSONS LEARNED

### Hard Work Isn't Partisan

Metro's partners in Measure M were widespread across the county and covering all major sectors of the community – local and regional governments, large and small businesses, labor, and members of the environmental, faith, disabled, aging and active transportation communities. Democrats, Republicans and Independents – the coalition of partners – was committed through nonpartisan hard work and planning by listening and engaging in every corner of the county.

### Stay Flexible

Metro's flexibility allowed the agency to make the best of a situation that went in a different direction than expected.

their concern about their commute, while for others it was about the region's economy, or air quality or equity.

Measure M involved hard work and planning and a lot of nonpartisan listening and engagement with every corner of the county. It called upon the leadership of LA Mayor Eric Garcetti and Metro CEO Phil Washington and the collective efforts of the nearly 11,000 Metro employees and, of course, the Metro Board. Representatives of the City of Los Angeles and from the county's nine subregions through the COGs also stepped up.

**"This plan spreads the benefits around, and there's a victory in it for everyone. That may drive some of the hardcore transit people crazy but Mayor Garcetti realized the reality of LA County."**

– Steve Hymon  
Editor, The Source

Leveraging Metro's partnerships and finding the right language to talk about Measure M was important to its passage. Phil Washington talks about Measure M as a "transportation transformation," bringing LA an "infrastructure inheritance" and "creating a new middle class." Some of these catch phrases were so spot on that other political leaders started using them. In their small way, they helped Metro win the hearts and minds of not just county leaders but the voters as well. Even in the toughest crowds, Phil Washington and other Metro representatives and allies repeated these phrases and one could see how they started resonating with people. Metro could describe the benefits of keeping transit fares affordable or completing a long-sought rail line, and voters became animated listening to Washington, Mayor Garcetti, Mayor Fasana and others talking about the power of Measure M. The confidence shown by these leaders was infectious and captured the voter's imagination.

### Find Common Ground

Metro's coalition partners found they could unite behind a plan with sometime adversaries if the plan benefited everyone. For some, partnering with Metro stemmed from their concern about their commute, while for others it was about the region's economy, or air quality or equity.

### Use Infectious Language

Finding the right language to talk about an initiative sets the tone for how people will think about the program. Mayor Garcetti and CEO Washington's key phrases and confidence in the plan was infectious.



California State University, Northridge students sign in at a community meeting to provide input on Measure M.



LA Mayor Eric Garcetti (center) and LA City Councilman and Metro Board Member Paul Krekorian (far right) with Measure M supporters at the North Hollywood Station. Photo: Hilary Norton, FAST.





## The Campaign

Many factors contributed to the success of Measure M, including sufficient money, strong bipartisan endorsements and leadership. Rick Jacobs, Campaign Director for the Yes on M campaign, recalls how anywhere Phil Washington spoke, people left saying, “I trust that guy.” Jacobs saw it in small groups and large meetings and felt that way as well. In Phil Washington, Los Angeles has an exemplar for how government can generate broad public support and transform an entire region for the benefit of its residents.

In addition to Phil Washington, the Mayor of LA, as the most visible public official in the region, needed to be on board and willing to campaign and raise the money “Yes on M” would need to wage a successful campaign. The business, labor and environmental coalitions and the leadership of other cities in the county, was critical as well.

LA Mayor Eric Garcetti was the face of the campaign and the political champion of Measure M. “Los Angeles had a visionary mayor who put his neck and credibility on the line and made this his issue,” explains Rusty Hicks, Executive Secretary-Treasurer, Los Angeles County Federation of Labor, AFL-CIO.

Many others played critical roles in the delivery of Measure M to the voters. After Measure J failed, Supervisor Mike Antonovich as Board Chair began the discussion of the capacity of leadership at the agency to move forward something like Measure M. Deputy LA Mayor and City transportation czar Borja Leon, Duarte Mayor John Fasana and his Board staff Mary Lou Echternach, and other Metro Board members and their staff were quietly involved in the recruiting and wooing of Phil Washington to LA. As head of a successful transit expansion program at the Denver’s Regional Transportation District, (RTD), Washington was viewed as the right person at the right time and the Board expressed confidence in him right away.

LA Mayor Eric Garcetti said he heard that Phil Washington was the best transportation leader in the country and wanted him for Metro, but knew that LA was also the most complicated county in the country politically and geographically. Perseverance paid off.

The behind-the-scenes work of the LA Mayor’s Transportation team and Metro Board deputies was a key component of the Measure M campaign. These professionals who had been involved with Measures R and J, understood the city and county’s politics, the Metro Board, the voters and the importance of raising money for the campaign. Explains Bill Carrick of the Yes on M campaign, “In the second most expensive advertising market in the country, to cut through the clutter and get out our message in a presidential election year, Measure M needed financial support.”

**“To do a campaign like this requires a real campaign. It is a strange experience to get your mind around two-thirds plus one. It’s not 50 percent. You need to start from that point of view from the get go. Two-thirds, you need a campaign, you have advertising clutter, and you have ballot clutter too.”**

– Bill Carrick  
Campaign Consultant, Yes on M

There was a three-year process leading up to the campaign with a lot of deliberation about the plan, the most critical issues and the public policy aspects.

The campaign knew that there had been major deficiencies in both Measure R and Measure J. Particularly outside of the city, Yes on M tried to address the region’s concerns, recalls campaign consultant Bill Carrick. Mayor Garcetti spent an enormous amount of time talking to Supervisor Mike Antonovich, and getting input from the COGs and coalition partners. Part of the campaign strategy was to develop a coalition that included the Supervisors and others who felt they had not been part of the process on Measures R and J. It was critical to address the widespread suspicion that the City of LA would be the main beneficiary of the process.

The willingness of the LA Mayor to make appearances all over the county to explain and garner support for the plan was so striking that at a meeting with the *Los Angeles Daily News* Editorial Board, one of the editors remarked that the Mayor had been out to more areas of the county more times than all four of the past LA mayors combined.

The campaign felt that due to demographic changes, Measure M would fare better than expected in some areas of the county that had not shown much support for an initiative of this kind before. Still, others expressed concerns about what they viewed as the campaign’s slow start.

**“I was willing to risk it all. I will have a great deal of satisfaction seeing my daughter and her family benefit from what we did in passing Measure M.”**

– Mayor Eric Garcetti  
Mayor of Los Angeles and  
Metro Board Chair



# The Campaign

The Yes on M team used previous Metro polls and focus groups as a foundation for informing the campaign. Campaign consultant Bill Carrick was moved by what he saw in the focus groups. “It was almost heartbreaking when people in the focus groups described their problems with transportation. It’s very clear that people want a transportation system that makes for less time in traffic; a system that better connects with one another. You could hear all that. We got that back from people’s comments, consistently.”

The campaign also heard the public’s reluctance to tax themselves and it was not necessarily from traditionally anti-tax Republicans. It was working class and low-income voters (most often Democrats) who were going to feel the worst of the pinch. They had pocket book and accountability concerns, though at the end of the day, they also wanted to support something that would improve their quality of life.



Yes on M found partners in the Los Angeles Chamber of Commerce, Move LA, BizFed, VICA, FAST, Investing in Place, Enviro Metro, AARP, organized labor, the Los Angeles County Bike Coalition and others who stepped up in support of Measure M. The opponents only have to keep you from getting that two-thirds plus one so to avoid the organic opposition, Yes on M tried to secure support from a cross-section of the community. Having seniors, business, labor, environmental, socio-economic and bicycle coalition on the campaign’s side was helpful and allowed Yes on M to call on informed advocates as needed to attend outreach events and city council meetings around the county.

In terms of strategy, the Yes on M campaign held events in smaller communities that they knew were not going to attract LA broadcast stations. “We might get one TV station, but the point was to get local press,” explains Carrick. “Both the Los Angeles and Long Beach mayors would be at the events with local officials. We didn’t just treat this as the top of the media pyramid.”

The campaign knew it was important to invest considerable time upfront to do research and know the voter. The Yes on M campaign wanted voters to focus on what Measure M means to them personally.

As the *L.A. Times* explained in its editorial, the voters wanted to get out of LA’s soul-crushing traffic. The campaign also knew that jobs creation was important to voters, so when the LA County Economic Development Corporation, a nonprofit, found that the major Measure M projects would generate 465,000 jobs, Yes on M had a strong talking point.

Money was of course also critical to the campaign. In the second most expensive advertising market in the country, Yes on M needed to get out its message in a presidential election year. To pass a ballot measure by supermajority and cut through the advertising and ballot clutter, it requires a real campaign. Two-thirds plus one is a lot harder to achieve than 50 percent.

One of the counterintuitive things that the Yes on M campaign found in the polling was that Metro had a good reputation and there were a lot of people who wanted Measure M.

The other thing the campaign did is treat Yes on M like more than just a paid media campaign. It treated M as a campaign that needed to use every tool in the tool box. The campaign assumed that there was a large percentage of the electorate that might vote YES. Yes on M was texting voters, including millennials, Latinos, African Americans and Asians, and at the end of the campaign, the texts were sent two or three times a day. The campaign was confident that these voters would vote for M if the campaign had messages about Measure M that reached them. The concern about texting is that it is intrusive, but the campaign actually got more texts back saying, “I wanted to be sure I voted for this. Thanks for the reminder.”

**“Be willing to change, to adapt, to talk people through their fears. And relationships matter. I learned a lesson a long time ago, you can’t dismiss people’s fears. You have to understand them and address them.”**

– Mayor Eric Garcetti  
Mayor of Los Angeles and  
Metro Board Member

Yes on M had help from Labor and the coalition partners and the endorsement of both the Democratic and Republican parties. Slate cards mattered as well and the campaign bought space on every slate card it could. Yes on M also talked to more casual voters and worked hard to reduce the drop off from the top of the ballot, the tendency of some voters to only vote in races on the top of the ballot.

As the campaign looked through the returns, something became clear. Even though Measure M didn’t get two-thirds in some areas, it did much better throughout the county than Metro had done on Measures R and J.

## A New Los Angeles

The indelible image of Metro delivering transit projects to the voters played a critical role in the ballot outcome. Even if you were not a transit rider, the sight of new trains moving east and west along the 10 and 210 freeways was a powerful visual to behold pre-election for those stuck in traffic.

The myriad lessons of Measure M and the transformation that it is bringing to Los Angeles County have already manifested themselves in new transit riders on LA’s trains and buses, first/last mile connections to transit, and highway improvements across the county. In a tough transportation infrastructure funding environment, Measure M represents the sort of collaborative, nonpartisan solution that the country will need to emulate in order to meet our changing but ever-present infrastructure needs.

Mayor Garcetti, Phil Washington and the Metro Board didn’t stay on the sidelines in this campaign, waiting to see whether the voters would bless Measure M. Instead, the Mayor and Metro’s leadership risked their political capital to gain passage of the *no sunset* tax. These efforts were critical to Measure M’s success.

**“Fortune favors the bold. In the future, it was the bold moves that got you there.”**

– Denny Zane  
Move LA



Metro CEO Phil Washington (second from left), former Metro Board Chair John Fasana (fourth from right), and Mayor Eric Garcetti join the Measure M flash mob dancers at a transit tailgate before a USC game.



LA Rams fans learn about Measure M at a pregame transit tailgate.

# The Campaign

## LESSONS LEARNED

### A Bigger Vision

The willingness of the LA Mayor to traverse the county to explain and garner support for Measure M was critical and made Eric Garcetti a regional leader. Mayor Garcetti understood that what is good for the region is good for the City of Los Angeles. It was a gamble for sure, but he had the data to support the conclusion that it was a risk worth taking.

### Impacts of a Tax Increase

The Yes on M campaign was sensitive to the fact that working class and low-income voters (most often Democrats) were going to feel the financial pinch of Measure M. They had pocket book and accountability concerns but at the end of the day they wanted to support something that would improve their quality of life.

### The Power of a Good Story

Heartbreaking stories of commuters spending hours a day in a car to get to their jobs helped the Yes on M campaign persuade voters through their messaging to support Measure M.

### Embrace the Partners

Yes on M found essential and tireless partners in the Los Angeles Chamber of Commerce, Move LA, BizFed, VICA, FAST, Enviro Metro, AARP, Investing in Place, organized labor, the Los Angeles County Bike Coalition and others who stepped up in support of Measure M.

### Soul-Crushing Traffic and Jobs

As the *L.A. Times* stated in an editorial, the voters wanted to get out of LA's soul-crushing traffic. The campaign also knew the jobs piece was important to voters so when the LA County Economic Development Corporation, a nonprofit, found that the major Measure M projects would create 465,000 jobs, Yes on M had a strong talking point.

### Fund Local Projects

Another strong talking point with voters for the campaign was money for Local Return to fix local roads, sidewalks and potholes.

### Campaigns Cost Big Money

In the second most expensive advertising market in the country, Yes on M needed cash to cut through and get out its message in a presidential election year. Roughly \$10 million was raised and spent by the campaign.

### A Real Campaign

To do a campaign like this you have to have a real campaign. To get two-thirds plus one you need to cut through the advertising and ballot clutter.

### Text Me

Yes on M made extensive use of IM and texting. The concern about texting is that it is intrusive, but the campaign actually got texts back saying, "I wanted to be sure I voted for this. Thanks for the reminder."

**Los Angeles Mayor Eric Garcetti enumerated the following additional lessons learned based on his involvement as the political champion and face of the Measure M campaign:**

### Be Transparent

We didn't do it behind closed doors. Start the process, trust the process and always listen to the people. In terms of lessons learned, don't forget to humanize this.

### Be Bold

Courage is important. Call it going with the *no sunset* forever tax or asking the county's voters to give Metro the resources it needs to make Los Angeles the nation's transportation leader.

### Poll and Poll Again

Start polling early and continue polling throughout the process.

### Get Ready for Full Body Surgery

We can work on this one day at a time. We can heal the veins one at a time, but Measure M was more than that. It was full body surgery.

# The Measure M Map



Metro's Measure M map showed the public how their local investment would provide benefits all across LA County – 40 major transit and highway projects in 40 years.

For project descriptions, please visit [metro.net/theplan](http://metro.net/theplan).



# Funding the Campaign

## A Pivotal Moment for Civic Engagement in Los Angeles

The Yes on M campaign was a civic enterprise. It was a chance for individuals, companies and organizations to come together to show their support for something that impacts us all. As Yes on M Campaign Director Rick Jacobs recalls, “They didn’t just slap their names on an endorsement and leave it at that. They came together and achieved something that is giving people like Jim Wunderman at the Bay Area Council in Northern California, LA Envy.”

The Yes on M Campaign raised over \$10 million with a straightforward pitch, “If you are a labor union, you will get more work, and your members lives will get better. If you are in the business of transportation, you will get more business and your employees will get more out of it. If you are an individual, having an integrated transportation system will be critical to your commute and to the region.”

Los Angeles is in part a city of great wealth, but it is also highly stratified socially and economically. LA has not traditionally had the same focus on collaborative philanthropy as New York, San Francisco and Chicago. People are generous here but they tend to exercise their generosity uniquely. Measure M demonstrated to the donor community that this was a chance to do something for the community to exercise philanthropy with a public purpose.



State Senator Bob Hertzberg touts how Measure M will benefit California State University, Northridge students at a campus rally. Photo: Hilary Norton, FAST.

## Funding the Campaign

The Yes on M team knew that it would be difficult to pass this initiative without a massive campaign. It is a permanent tax and with its passage the Measure R tax also became permanent. A county as big and complex as LA can’t have partial funding for transportation infrastructure. Yes on M knew it was going to be hard but they also knew that the voters saw that if we did this, we win. Metro is not going to come back to them in two years, hat in hand.

The Yes on M campaign raised most of its money from labor unions, infrastructure contractors, local philanthropists and others. “It really was a pivotal moment for civic engagement in Los Angeles,” recalls Jacobs, still very much in pitch mode. The United Brotherhood of Carpenters and Joiners of America made a considerable donation to the campaign. The Carpenters saw that it was going to generate good paying jobs and good work and that it is good for their members. That set the bar. Once the Carpenters donated, the Laborers, the Operators, the IBEW and other unions stepped up. Among the infrastructure contractors, it was a similar story.

On the philanthropic side, the leadership at LACMA, the county art museum, explained the importance of Measure M to the arts community. A wealthy local philanthropist helped Yes on M raise money for the campaign with a dinner. Local theme park operators recognized that it would help visitors get to the parks and made donations.

Mayor Garcetti is widely credited with selling Measure M. He told potential donors that Measure M was the most significant undertaking for LA since William Mulholland brought water from the Eastern Sierra to the region more than a century ago. So the campaign had a charismatic, thoroughly engaged mayor, and before long there was widespread recognition that you had to participate if you care about the county.

The company building the new football stadium in Inglewood, a major downtown civic booster and many other large donors supported the campaign. Everyone did something and it was Republicans and Democrats alike who showed their appreciation of the importance of the campaign by donating. Given the contentiousness of the presidential election, the campaign stayed on message with the observation that, whatever the outcome of the presidential race, if we don’t pass this now, we lose the chance to give LA the transportation system it needs and deserves.

## LESSONS LEARNED

### LA Envy

Donors to the Yes on M campaign didn’t just provide their names as an endorsement of the campaign and leave it at that. They came together and achieved something, and in doing so, gave other parts of the state LA Envy.

### Making the Ask

Raising money for a campaign like this requires a likeable, charismatic, tireless campaigner with the knowhow to make the case for the measure and willingness to make the big ask. Mayor Garcetti sold Measure M to the donor community, as well as to county voters. He told potential donors that Measure M would have as great an impact on LA as William Mulholland bringing water to the region.

### Timing is Everything

Given the importance of an initiative of this sort, timing the campaign for a large turnout presidential election cycle is critical. Not enough voters turn out for an off-year election to garner the votes to win.

### Hire a Professional

The cost of paid media in a presidential election year in a market like LA is considerable. Hiring an experienced campaign advisor who knows the market is critical to the campaign’s success.

### A Monumental Problem

Having a problem to solve as monumental as LA gridlock helped Yes on M win over the public and donors. Traffic is something that impacts everyone who lives, works or visits here.

### All Politics is Local

Keeping the campaign nonpartisan in a contentious presidential election cycle was key. The campaign needed to stay on message, conveying to the voter that this was something that would benefit each and every one of them. It was a chance to give LA the transportation system it deserves.

# Touting Job Creation

Selling Measure M as a jobs creator was critical to the success of the campaign. Recalls Rick Jacobs, “We went up to Lancaster. Kinkisharyo is building 235 rail cars for Metro there. We are buying the most rail cars of any city in the country. These are union jobs with health care and pensions. And it’s in a former B1 bomber factory. The elected leadership asked the voters to pitch in and they came through. BYD, a bus company, is in Palmdale with 500 employees. They’re building electric buses that are going to be on the roads here and all over the country.”

Rusty Hicks of the Los Angeles County Federation of Labor is excited about Measure M because it is building out the backbone of the county. “That map essentially says where this county will be in 50 years, in 100 years.” But equally important is that, “We are talking about putting two generations of workers into good jobs. There are workers just coming into the workforce now who will spend their career building rail lines, that’s unheard of in 2018 in the United States. These are jobs that will be around in good times and bad. For the next 40 years, we are going to be building some kind of a rail line. The estimates I have heard vary from 465,000–770,000 jobs. That’s in construction, operations and maintenance, so it cuts across the sector.”



## LESSON LEARNED

### Tout Job Creation

Measure M is a jobs creator with a compelling story. The union workers with health care and pensions building 800 rail cars in a former B1 bomber factory in Lancaster and at an electric bus company with 500 employees in Palmdale, represent the first of generations of workers with good wage jobs. These are jobs that will be around in good times and bad. Quality, good wage jobs and job security are a unique selling proposition in an era of declining wages and vanishing employment.

# The Campaign Ads

Everyone was tired of traffic, and the Yes on M campaign gave them simple reasons to support the initiative. In the November election cycle, an estimated \$600 million was spent on state ballot ads. To drive home its message, with a healthy but limited budget, Yes on M needed a guide and a narrator to cut through the clutter and say to the voters, “Hey, this is why you should vote for this.” Mayor Garcetti proved up to the task.

What do the local election results mean? Is it a new day for people to believe in their elected leaders? Rick Jacobs believes that the people voted the way they did on Measure M because they understood that the only way to ease traffic and solve our transportation challenges is together, through quasi-legislative agencies like Metro.

People were literally stuck in traffic and nothing was going to get better unless voters did something together about it. The campaign told them that.

Measure M is also flexible and can be altered. Every 10 years, the Metro Board has the ability to make adjustments to the program and invest in other mobility options. Over time, the scenario is going to change and the plan is sufficiently flexible to adjust to technology changes.

**“If people want to have fights about where the money should be spent, that’s just democracy. It’s expected. The worst thing that we could have done is pass a Measure M that was so inflexible that it mandated every BRT, every rail line that it’s got to be located here. Fifteen years ago, who would have thought that we’d have 40,000 to 50,000 people living downtown and it’s growing and growing. The great thing about Measure M is the revenue stream is there, the plan is there and it has living breathing flexibility.”**

– Bill Carrick  
Campaign Consultant, Yes on M

## LESSONS LEARNED

### Keep it Simple

Don’t talk with voters with the alphabet soup of transportation – BRT, LRT, and so on. The campaign reached voters with straight talk about Measure M.

- More rail lines and more rail stops make moving around simpler.
- There is always going to be traffic, but are you better off doing nothing about it?
- Local return will fix your potholes and pave your streets.
- A new transit line can speed commutes for all, because it offers new riders a travel alternate and takes cars off the road.

### Find the Navigators

In a crowded media market, finding guides and narrators to cut through the clutter and say to the voters, “Hey this is why you should vote for this,” was critical. CEO Washington, former Metro Board Chair Fasana, Mayor Garcetti and others proved up to the task. At least at the local level, it is a new day for people to believe in their elected leaders and public servants. People voted the way they did on Measure M because they understood that the only way to ease traffic and solve our transportation challenges is together, through quasi-legislative agencies like Metro.



# Educating the Public

With approval by the Metro Board to place the measure on the ballot, the Board also approved \$2.5 million for Metro's Communications team to implement its public education program on the Los Angeles County Traffic Improvement Plan. In July 2016, the LA County Board of Supervisors voted to approve putting Measure M on the November 2016 ballot, and the County Board of Elections acted on the Ordinance in August 2016.

Metro's Measure M public education campaign included an array of traditional and non-traditional activities to connect with diverse audiences across LA County.

**“In March 2016 we had the Gold Line opening with an event. In May 2016 we had the Expo Line opening and event. And I insisted on an event for the 50 percent mark on Crenshaw LAX in between. These events showed the public what we were capable of and what we had already achieved.”**

– Phil Washington  
CEO, Metro

Metro staff members were out in force across the county from July to November 2016:

- 450 community presentations and events
- 50 press conferences and special events highlighting the agency's progress
- Telephone town hall meetings
- Festive pop up events at rail stations with music and M&Ms (for Measure M), reminding people to vote on Election Day
- Metro's transit flash mob breaking out into dance accompanied by a mix of transportation-related songs: Magic Bus, Ticket to Ride, Crazy Train, I Hear the Train a Comin', etc.
- Transit tailgates at an LA Rams home game and a USC home game, where Mayor Garcetti even danced with the flash mob

“It was an opportunity to let our hair down a bit and have some fun about this major, serious effort designed to create better mobility throughout the county. There was a point some weeks before the election when the poll numbers had dropped a little and that worried some of us. But we said, ‘We're going to have some fun with this. We've done everything we can. Let's just get out there and connect with the people,’” recalls Pauletta Tonilas, Metro's Chief Communications Officer.

A good crisis communications team and keeping things in perspective kept Metro staff forging ahead even when problems arose. In January 2016, the *L.A. Times* did a front-

**“There's an old saying, today's paper wraps tomorrow's fish. You have to be able to sustain these bumps in the road, knowing that tomorrow will be another day with a whole new batch of headlines.”**

– Pauletta Tonilas  
Chief Communications Officer, Metro

page story on a drop in Metro's ridership, and there was a bit of a panic among some Metro officials, worried that the negative publicity would cast a shadow on the ballot measure. The Communications team quickly moved into damage control, responding that ridership across the nation is cyclical, yet Metro's rail ridership is up. The conventional wisdom of the team was, “We're in a marathon here, not a sprint. Most people don't glom onto the news like we do.” Every day something was happening and Metro's Communications team became masters at juggling the changes and the dynamics.



To Phil Washington, Measure M was about educating the public on the county's need for a comprehensive transportation infrastructure building program. Metro has long placed a strong emphasis on communications, but under Phil Washington's leadership, the Communications program became more robust than ever. The steady stream of openings and events was a critical piece of Measure M education and outreach. In March 2016, Metro had the Gold Line opening with an event. On May 7, 2016 the Crenshaw/LAX Transit Project had a Halfway There (50 percent completion) Community Celebration at Leimert Park Village and on May 20 and 21, 2016, Metro celebrated the Expo Line to Santa Monica. All three events plus a host of other Metro progress milestones showed the public what Metro was capable of and what it had achieved since the passage of Measure R. And the progress on projects was displayed with events and announcements countywide. Metro had 50 special press events from July to early

November 2016 to showcase other progress, including the delivery of new light rail cars, the Blue Line rehab project, the expansion of Metro Bike Share, the opening of a Mobile Customer Center, the award of grant funding, and other construction milestones. Showing the progress of local investment was essential.

Having the blessing of the media including the *Los Angeles Times*, was essential to Measure M's passage explains Yes on M campaign consultant Bill Carrick, “You know that transportation reporter Laura Nelson at the *L.A. Times* is going to show the ballot measure warts and all, but by and large it was fair coverage. And I think the *L.A. Times* understood the importance of Measure M, and that was powerful.” Speaking of the role of a supportive press to a campaign like Measure M, Gary Toebben of the LA Chamber of Commerce notes that, “Having the media on board with what you are trying to do, takes the wind out of the sails of the opposition and makes it harder for the opposition to get a beachhead.”

#### The Mailer That Wasn't

It was the mailer that never became a mailer. One of the many challenging decisions Metro had to make during the Measure M education and outreach phase was about whether to send out a mailer about the plan to all addresses in LA County. Metro had done a countywide mailer for Measure R but not for Measure J. Certain Board members took exception to it and complained about the cost of the mailing. So, the agency never did the Measure J mailer.

For Measure M, Metro officials looked to the past: Mailer for Measure R = success; no mailer for Measure J = failure. Metro's Marketing Department developed an eye-catching fold out mailer, and had ordered the paper for four million pieces for a mailing to all LA County households. Metro was in the midst of its review and had gone through many revisions of the draft, including input from LA Mayor Garcetti, Chair John Fasana and their staff. Print date was getting close.

County Counsel, General Counsel for Metro, reviewed all of the informational materials that Metro put out about Measure M and the plan. As noted by Assistant County Counsel Charles M. Safer, County Counsel's primary concern was making certain that Metro complied with the legal requirement that it provide accurate, fair and impartial information and not engage in an advocacy campaign. That's the fundamental legal issue that Metro faces as a public entity. Like any other public entity, Metro cannot use public funds to advocate for or against a ballot measure, but it can provide straightforward, unbiased informational materials.

The threshold questions in this regard are:

- Is Metro providing information that is fair, accurate and impartial?
- Is the messaging aimed at trying to persuade the voter?

Safer explained that this is not an easy task. Metro has a highly accomplished professional Communications staff, including

an award-winning marketing department. Although the initial inclination of staff was to stress the benefits of the projects and programs to be funded by Measure M, they had to reign in their enthusiasm and creativity so that their work product did not appear to advocate in favor of the ballot measure.

The mailer was particularly problematic when it came to the issue of what constitutes advocacy. After significant effort into the preparation of the mailer, at the eleventh hour, Metro CEO Washington made the call not to send out the mailer. County Counsel and some Board members were concerned that the mailer might be challenged in court on the basis that it constituted advocacy in favor of Measure M due to its format, appearance and planned direct mail distribution so close to the election. CEO Phil Washington recognized the potential negative impact a legal challenge could have on the outcome of the election, and made the difficult decision not to mail it. Instead of printing close to four million pieces, Metro's Marketing Department did a print run of 500,000 for the mailer that never became a mailer. The smaller printing made available to numerous stakeholder groups was a perfect handout for community meetings, town halls, community events and door-to-door canvassing. The coalition supporting the measure also took advantage of the free mailers to save on their own printing and distributed them through their own channels. At events around the county, Metro's Communications team also caught the public's attention by distributing thousands of packets of M&Ms (for Measure M) stapled to the mailer and mini handouts.

**“You almost have to go right up to the legal line to win. You don't want to cross that line. And to win in these things you have to make tough decisions. You have to note that your legal counselors are advisors, they are not the decision makers. Often times leaders fall into the trap, ‘We can't do it, our attorney says no.’ And all of a sudden you have the tail wagging the dog.”**

– Phil Washington  
CEO, Metro

To mail or not to mail was a tough call for Metro, but in the end, the leg work and the smaller-than-planned print run became the foundation of its public education and outreach campaign. And Metro's Marketing team quickly pivoted and redirected the funds for the full-blown mailer to a widespread education effort. Within a few weeks, the team developed and rolled out a robust campaign utilizing targeted social media, digital ads and outdoor ads.

As Metro CEO, Phil Washington excelled at showing confidence in Metro's work and he expected the same from his entire team. In at least one meeting with the team, Washington implored his staff, “All of you have to be all in.”

# Educating the Public: Campaign Touchpoints

THE MAILER THAT WASN'T

PRINT COLLATERAL

ON BOARD POSTERS

FACEBOOK ADS

PERSONALIZED VIDEO STORIES

MOBILE APP SPLASH SCREEN



# Educating the Public

**“We talk about the story of Fisher Ames. Have you heard of him? No. Well here’s why. Fisher Ames was the guy who advised Thomas Jefferson against the Louisiana Purchase. He called it a great waste and felt \$27 million is too much to pay to buy half the United States. I actually told that story at a lunch with the critics of Measure M. That the names of the critics will be lost to history. We just plowed forward. We were not deterred by the Fisher Ames’ of the world, of LA County.”**

– Phil Washington  
CEO, Metro

## Containing the Opposition

Measure M was not without its detractors. Among the most vocal was then-State Senator Tony Mendoza from the Gateway Cities COG. Senator Mendoza argued that Measure M benefited the City of Los Angeles at the expense of his constituents and others outside of the city. The pro-Measure M bloc tried to convince him he was out of step with his voters and in fact, in his district, well over 70 percent voted Yes on M. But Senator Mendoza was not bowed.

Rick Jacobs of the Yes on M campaign recalls, “We went to the first meeting, post adoption of the plan. Mayor Garcetti to his credit, went to all of these cities and to the COG meetings. Other elected officials would probably have thrown up their hands and said, ‘I’m done.’ But he never did this. He said to them, ‘We’ve tried to do the best that we can. Isn’t something better than nothing?’”

Still, some in the COGs said, “It’s not.” Some of the COG members felt their cities were stuck in the shadow of the big City of Los Angeles. “We’re always left out, and no matter what you say, Mr. Mayor Garcetti and Mr. Washington, we’re going to get screwed...I see that other parts of the county are getting something and we are not. It feels like we are being forgotten.”

**“I was on the train and I ran into a city manager for another city and he said he didn’t get it. I said, ‘Look at the plan. Overall, it’s the greatest thing since sliced bread. Look at the projects, despite what your COG leadership is telling you.’ He was in a small disadvantaged community and he took another look.”**

– Mark Yamarone  
Deputy Executive Officer, Planning, Metro

Five weeks before the election, a group of South Bay cities filed a legal challenge seeking a court order that would require significant changes to the ballot label and title. They argued the ballot label was false or misleading to voters because it did not refer to Measure M as a new permanent one percent tax and described the Measure as a “traffic relief tax.” Metro prevailed at the trial held on September 6, 2016, and in subsequent appellate proceedings held before the election. The court concurred that Metro’s description of the Measure M sales tax was fair and accurate.

The concern that Phil Washington had snuck into the plan the Sepulveda Pass Transit Corridor over some of the subregional opposition still lingered well after the votes had been counted.

The electeds opposed to Measure M tried hard to get a leg up and to get everyone’s attention, but their message did not resonate with voters. Recalls Gary Toebben of the LA Chamber of Commerce, “It sounded self-serving, like ‘we’re not getting enough money.’ Even though they said it, the voters said, ‘We need this, we need Measure M.’”

**“If you give people the price before they feel the need, the price is always too high. In this situation, the need was so obvious, even the people opposed in the South Bay and elsewhere couldn’t convince the public to vote no.”**

– Gary Toebben  
CEO and President, LA Chamber of Commerce

Still others quibbled with the language of the measure, “easing traffic.” But as Joshua Schank, Metro’s Chief Innovation Officer, explains, “You have to be a realist at some point.” Measure M won’t get rid of traffic but it will give county residents another way to get to their destination. If you want to be a purist about the language you use, then you are going to be a purist who doesn’t win ballot measures. If Metro had said, Metro is going to solve all of your traffic problems, that would have been a lie, but it said something that is true. We are going to ease traffic congestion. “We weren’t writing a dissertation here, we were trying to win a ballot initiative that will fundamentally change the way LA moves.”

Yes on M Campaign Director Bill Carrick credits the optics and reality of open and operating transit lines with putting a damper on some of the organized opposition to Measure M.

## Outreach to the Faith Community

A group of critics in South LA banded together over their opposition to how Metro was building part of its Crenshaw Light Rail Line in the Crenshaw community. They wanted the agency to build a rail tunnel through instead of the rail running at street level due to safety concerns. Their campaign slogan was chanted at Metro Board meetings, posted on signs and printed on t-shirts: “It ain’t over ‘til it’s under.”

**“The African-American clergy has so much influence in the black community. Our partnering with the African-American clergy, it countered that opposition, and this is a true partnership between Metro and the black church, and with all faith communities across the county. For critics in South LA or wherever, it’s very difficult to argue with the clergy.”**

– Phil Washington  
CEO, Metro

Like his commitment to economic and geographic equity, the idea of the outreach to the faith community comes from Phil Washington’s childhood.

“If you want to convey a message and get something done in the black community, you go to the ministers. And LA has a wealth of large, medium and small churches. Bishop Charles E. Blake, Sr. of the West Angeles Church of God in Christ (COGIC) and Bishop Kenneth C. Ulmer of the Faithful Central Bible Church are critical voices in the African-American community. With the 26,000-member West Angeles Church of God In Christ, Bishop Blake was a key partner and so was Bishop Ulmer. *One LA*, too.”

One time during the lead up to the vote when Phil Washington was meeting with a group of African-American clergy, a clergyman asked him, “If Measure M doesn’t pass, what’s your backup plan?” Without skipping a beat, Washington replied, “Oh ye of little faith.” They no doubt thought that was very interesting, all these men and women of the clergy. Washington recognized the importance of partnering with the diverse clergy of the county.

Even if Metro didn’t have to counter the opposition, it would have done outreach to everyone. Metro Deputy CEO Stephanie Wiggins says, “We were not being politically calculating in reaching out to the clergy. That’s part of Phil Washington’s DNA. We would not have any credibility if the CEO had approached them after the expenditure plan.” While at the RTD, Washington had also reached out to the ministerial alliance in Denver. “You’ve got to know these ministers,” explains Washington.

**“This whole thing about educating and advocating. Going back to the African-American churches, you talk about evangelizing for these measures. The Pope himself would love this plan. Metro is out here keeping fares low for low income mothers and children. Jesus was an infrastructure guy. His earthly father was a carpenter.”**

– Phil Washington  
CEO, Metro

# Educating the Public

## Winning

To win, there has to be a political champion who understands the psychology of convincing the voters that something like this bold vision is a good idea. That *lessons learned* holds true regardless of where you are in the nation.

Early on though, it was more like sausage making, and the Planning Department, Office of Management and Budget, and Metro's Communications group were critical to Metro's success. CEO Washington uses a sports analogy to explain his game plan. You need your Offense, Defense and Special Teams. Built in, the initiative has to have the combination of all three.

Metro's Deputy CEO Stephanie Wiggins emphasizes the importance to the success of Measure M of the organization's *promises made, promises kept* approach. She notes how Washington expects the entire agency to be involved in delivering on its promises. In Metro's weekly senior leadership team meetings, the entire team was expected to be vigilant in their daily efforts, working to ensure that Metro's buses and trains were rolled out on time, that the system is safe, and so on. Audit even had a role making sure the agency maintained its unblemished record on audits and remains a good steward of the public's money.

Under CEO Washington's leadership, everyone was expected to understand how everything they did impacted the initiative and passage of the measure. The day that Metro veteran David Yale realized that Measure M was going to succeed was the day that Phil Washington, shortly after coming on board as CEO, pulled the whole team together, not just the senior executives, to talk to them for a day about where we were and what we needed to do.

Washington wanted to make sure that all staff – not just the senior management – were informed and knew the messages to share. His commitment to being a good steward of taxpayer dollars and public trust filtered down to the line employees. He wanted all employees to know what the plan was and be ambassadors for Metro.

**“There is a redefinition of what public transportation can be, because we are expanding our transit at a time when we are also expanding our notion of what public mobility can be and it's not as simple as traditional public transit anymore. LA is front facing and can make that happen.”**

– Therese McMillan  
Chief Planning Officer, Metro

“Our concern was, if they don't know what's in the plan, they will make it up, and that's not what you want happening,” said Washington.

Also critically important, in the view of the CEO, was showing how Metro's plan would impact disadvantaged communities. Metro staff created a map of the Measure M projects with an overlay of disadvantaged communities across the county. It demonstrated the agency's commitment to equity. There was even a map showing how all modes of transportation would connect – rail lines, freeways and bike paths.

**“When we went out, we could throw up the slide and say, ‘Look at this and how it touches each of the county's disadvantaged communities.’ We showed the voters and our critics that the system we are building goes to these communities, goes to our employment centers, our schools and hospitals, not just to the Westside. I heard, ‘You're doing all that work on the Westside.’ I think us showing that map took the wind out of the sails of the argument of Metro's more militant critics. It really addressed their argument that, ‘You ain't building here or there.’”**

– Phil Washington  
CEO, Metro

It wasn't just that Phil Washington had the idea of that slide for the outreach presentations. Equally important was that it was proactive. It sent the message that Metro had thought about the entire county. Speaking of Measure M's commitment to economic and geographic equity, Washington explains, “That came from my experience growing up in Chicago. The public housing I grew up in, the bus frequency, the transportation didn't come often enough to where I was from.”

Metro's PowerPoint presentation helped the agency sell the plan across the county. None of this happens fast and it's not cheap, but Metro needed to be inclusive and transparent with the voters about what they would be getting in order for Measure M to succeed.

## LESSONS LEARNED

### Educate Don't Advocate

Legal counsel's role is to maintain the wall between education/outreach and campaign advocacy. Since an agency that is pursuing a ballot measure can't advocate for it, any material that the agency puts out needs to be fair, impartial and accurate without advocating. But it's okay to go right up to the legal line as long as you don't cross that line.

### Be Nimble

When things don't go as planned, pivot and embrace Plan B.

### Be Relatable

Outreach to the faith community is important because it makes the agency relatable by connecting with people in a safe, trusting environment of comfort rather than appearing as an unseen, unfeeling big government agency.

### Counter the Opposition

Metro's engagement with the faith community helped counter the opposition's message. People trust their faith leaders. Standing on the dais at some of the county's large congregations gave Metro and CEO Washington credibility it would have otherwise lacked.

### Vet the Product

Challenges to ambitious plans like Measure M are inevitable. Having legal counsel vet the plan beforehand is critical to reducing the likelihood that a lawsuit will be fatal to the effort.

### Put the Best Face on the Financing Picture

As Metro's David Yale explains, the idea that there is more financing capacity out there to further accelerate the projects is a fallacy. Maximum acceleration was already assumed and is built into the Measure M spending plan. To get to 71 percent, Metro had to show the voters the best schedules it could. Agencies exploring their own Measure M-type initiative should assume as much borrowing as they can in their financial plan to show the best scenario and schedule to the voters. The flipside is to save some borrowing capacity for the future, but Metro's thinking is that it is better to show the voters the best scheduling scenario possible.

### Safeguard Against the Bait and Switch

The Measure M ordinance prohibits accelerating one project at the expense of another, and that restriction can't be amended by the Metro Board – only by the people. This provision helped Measure M win over voters and critics who might otherwise have feared a bait and switch scenario that would have allowed taking one project's funding to fund construction of another.

### Embrace the Critics

Agencies have to keep moving forward when confronted with lawsuits and critics. Careful preparation will help build confidence in the mission.

### Create Good Optics

Promote progress of newly opened and operating transit lines to demonstrate that the agency can be trusted to deliver on its promised transportation improvements and put a damper on some of the organized opposition.

### Adjustments

If you have the mindset that you are not going to make any adjustments to a plan and are not open to any adjustments, you are looking at a deal breaker.

### Traffic Impacts Everyone

LA's legendary crippling traffic require solutions that are not the status quo. The courage of the Metro Board to consider and ultimately support a *no sunset* transportation sales tax reflects the Board's appreciation that LA needed to take a bold approach to a resilient problem. While not every jurisdiction suffers from the level of congestion plaguing Los Angeles, the lesson underscores the need to identify an issue that the Board and others can rally around in a nonpartisan way. The bottom up process also helped make all Angelenos partners in the advancement of the measure.

### Consider One-on-One Meetings

One-on-one meetings with the Metro Board helped Phil Washington build consensus on Measure M and helped keep conflict about the plan from escalating. These meetings helped keep the program which was on a tight schedule from going off the rails.





LA Mayor Eric Garcetti and Metro CEO Phil Washington spread the Measure M word at a transit tailgate.

The Measure M initiative was striking in the way it brought together civic leaders who are often on different sides of the fence, opposing one another on other policy or legislative issues. Take Supervisor Antonovich and LA Mayor Eric Garcetti. On Measure M, a *no sunset* “permanent tax” for transportation, they put aside their differences for the sake of the county, and arguably for their legacy.

**“It’s not one thing, it’s everything across the whole organization. And it’s super important that the CEO be someone like Phil Washington. If your CEO is someone who gives you the job and doesn’t check in and expects you to do it all, it’s never going to happen.”**

– David Yale  
*Former Senior Executive Officer,  
Countywide Planning, Metro*

The story of Measure M’s success is intricately tied to the arrival at Metro of CEO Phil Washington. Washington has been fortunate to be involved in two of these transportation initiatives, in Denver and in LA. Phil Washington was like a Command Sergeant Major that he was in leading the initiative and Mayor Garcetti was its political champion. The other critical component was Metro. Together, leadership and organization were the pillars on which Measure M rose.

Most of the 71 plus people interviewed for this report mentioned Phil Washington as one of the major reasons Measure M gathered over 71 percent of the vote in November 2016. Gary Toebben of the LA Chamber of Commerce and a veteran of LA’s transportation tax wars believes that Phil Washington inspired a new level of confidence in Metro. With his military background, Washington conveys that he will accomplish what he says he will get done in a no-nonsense kind of way. In the case of Measure M, the public believed both the vision and that they had someone in charge who could deliver on the promises.

**“Everybody wanted everything. Everyone can’t get everything. But everyone is getting something. Our leadership worked hard to make this a comprehensive transportation plan across the whole county.”**

– Pauletta Tonilas  
*Chief Communications Officer, Metro*

The 2013 election of Mayor Garcetti was also pivotal to Measure M’s success. The prior LA mayor and Metro Board Chair Supervisor Mike Antonovich had different goals and different ways of doing business. The election of Mayor Garcetti provided Metro and the county with an opportunity to give regional leadership a chance.

Other critical leadership on Measure M came from Duarte Mayor John Fasana, Supervisor Mike Antonovich and the rest of the Metro Board and their able deputies and staff. Metro Deputy CEO Stephanie Wiggins, former Metro Planning veteran David Yale, Chief Program Management Officer Richard Clarke, Deputy LA Mayor Borja Leon, the Planning, Office of Management and Budget, Communications and Program Management teams, and the leadership of Metro’s community partners in the business, labor, faith, environmental and active transportation community were also critical to Measure M’s passage. It wasn’t one thing. It was everything.

## LESSONS LEARNED

### Identify a Political Champion

To win, there has to be a political champion, a person with charisma and likeability who understands the psychology of convincing the voters that this bold vision is a good idea.

### Follow the Leader

Leadership and organization were the pillars on which Measure M rose. Measure M was blessed with an unusually able team of leaders in CEO Washington, Mayor Garcetti, Director Fasana, Supervisors Antonovich and Ridley-Thomas and the rest of the Metro Board and their able deputies.

### Leadership Matters

Metro CEO Phil Washington fostered a team approach to delivering on Metro’s promises to the taxpayer. This was critical to convincing the county that Metro could be trusted with its tax dollars.

Metro built confidence grounded in preparation and forethought on how to deliver on its promises. Three efforts were key elements of showcasing to the Metro Board and the public how Metro staff was already managing its projects, getting future projects as ready as possible for construction, and developing a roadmap for implementing Measure M.

- The Annual Program Evaluation
- The Shovel Ready Plan
- The Program Management Plan (PMP)

Metro’s Measure M Program Management Plan (PMP) dated October 19, 2016, outlines how Metro will manage and implement the capital improvement portion of Measure M. Metro calls the PMP a department-by-department roadmap that lays out the necessary resources and processes needed to implement Measure M. The PMP is a dynamic document that can change as Metro works through program implementation.

Metro’s Program Management Department oversees the engineering and construction of projects once the Planning Department completes the environmental planning process. With Measure M, Program Management was at the table throughout the development of the plan to help determine how the various projects would integrate into the overall program. The group did the cost estimates for the capital projects and participated in the education effort. Compared to most other U.S. transportation agencies, the scope of the projects in Los Angeles is bigger, there are more of them and there is always lots of politics. “Being a bigger agency there’s more bureaucracy to overcome. Some of it’s necessary and some of it’s not,” says Richard Clarke with just a hint of irony in his voice.

## LESSONS LEARNED

### Build a Road Map

Developing a Program Management Plan before taking a ballot measure to voters shows a strategic path forward in how a major program will be implemented. All departments should be integrated into the PMP indicating how each will manage their area of discipline throughout implementation.

### Change with Time

The PMP is a dynamic, working document that can change over time as conditions change. With a long-range program, building flexibility into the PMP is important so an agency can adjust as the program and economic times change.

The Metro leadership wanted to build confidence from the general public that Metro could deliver projects on time and on budget. Because of issues on past projects, the public has sometimes had a perception of Metro as known for delivering projects late and over budget. And many people can vividly recall the damage caused by the Hollywood Boulevard sinkhole during construction of the Red Line subway. With \$15 billion in projects already under management when Metro brought Measure M to the public, it was crucial that the agency put forth a roadmap for implementation. Construction projects will always encounter unforeseeable problems. While it is unrealistic to expect the agency will deliver 100 percent of the projects as planned without issues, staff wanted to be proactive in providing a strategic framework to, as much as possible, prevent things like the utility relocation problems that delayed construction on the agency’s Regional Connector project, and conflicts with third-party stakeholders when it comes to design reviews and obtaining permits during construction.

These are the biggest of the big projects anywhere in the country and they are expensive. Metro’s subways now cost \$1 billion a mile to build. And staff knows all eyes will be on Metro as it builds out Measure M. A strong plan for implementation, like the Measure M Program Management Plan, will help the agency deliver the plan to the public as intended.

**“I thought one of the good things we did was to do the program management plan before Measure M passed, rather than wait till passage and then say, ‘What do we do now?’”**

– Richard Clarke  
*Chief Program Management Officer, Metro*

### Build Confidence

The PMP provided an opportunity to show a proactive management strategy to instill confidence in Metro as an agency that can deliver projects on time and on budget. This is important in a culture where there is little tolerance for error in the building of public projects.





## Conclusion

**“There is not a business or private entity that can move this sort of project on its own. It takes a large, experienced governmental entity to achieve a project of this scale that will benefit the 17 million people who live within an hour’s drive of Los Angeles. That’s what’s critical about this being done right.”**

– Rusty Hicks  
Executive Secretary-Treasurer,  
Los Angeles County Federation of Labor

In a county where only seven percent of the population currently rides transit, it might be said that Metro needed nothing short of a *divine* plan to remap Los Angeles. But to call the plan divine would be to give short shrift to the broad coalition that came together to ensure Measure M’s passage by over 71 percent of the voters. Measure M won because of the bipartisan hard work and planning on its behalf, and the listening and engagement with every corner of the county by Metro and its partners. It won because of the bold leadership of CEO Phil Washington and City of LA Mayor Eric Garcetti, the collective efforts of the 10,000 employees of Metro and the Metro Board, representatives of the City of Los Angeles and from the county’s nine subregions through the Councils of Governments (COGs). Critical partners include local and regional entities, large and small businesses, labor, and members of the environmental, faith, aging, disabled, active transportation and philanthropic communities.

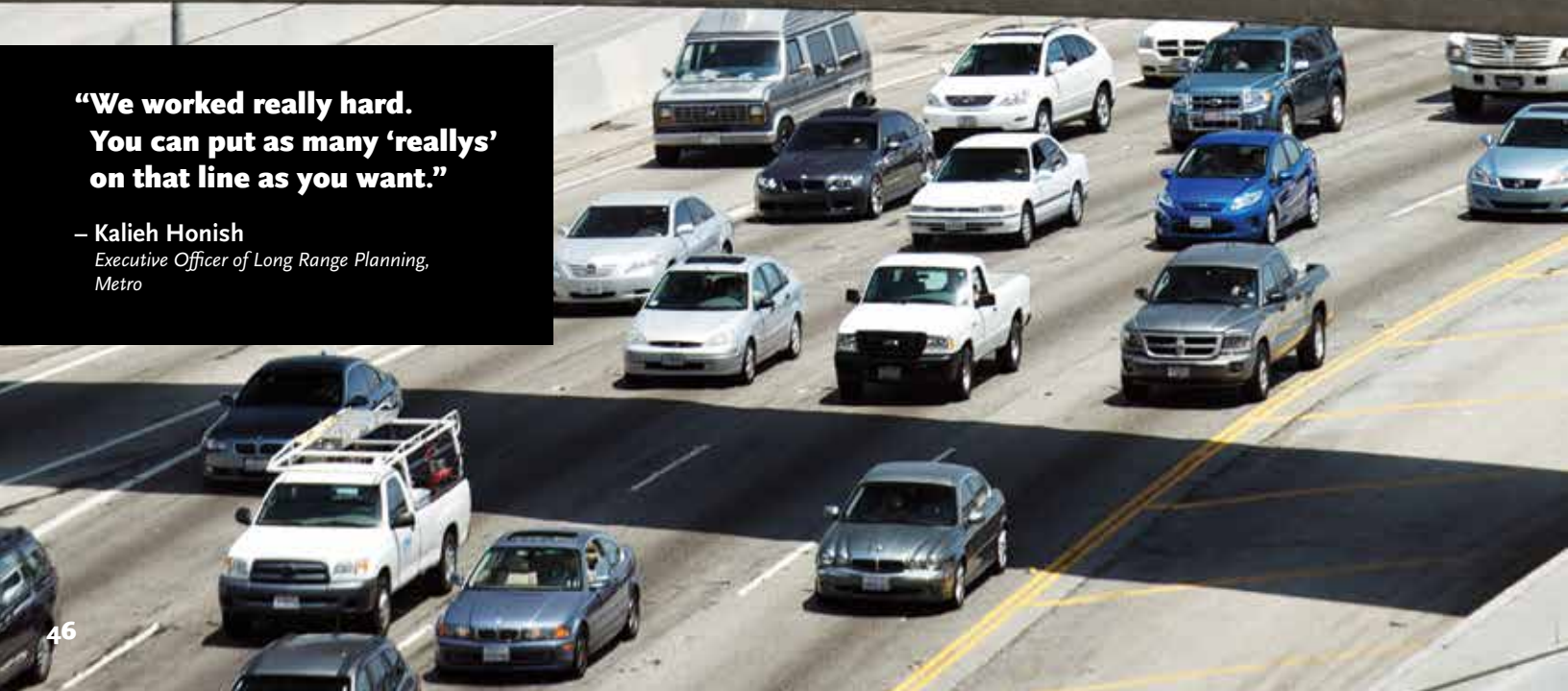
Measure M was a case study in resilience, risk taking and common sense. Still, the plan was not without its hiccups. But in voting Yes on M, Los Angeles County voters embraced action on the county’s transportation challenges rather than accepted the status quo. As a result, Metro is implementing a comprehensive program of 40 major highway and transit projects and a host of other programs that will transform LA County over the next 40 years.

Measure M passed because voters have confidence in Metro and its partners. Voters believe in Metro’s ability to make LA the nation’s transportation leader. In the words of Gary Toebben of the LA Chamber of Commerce, “It is how our employees get to work and how goods and services move. So, even though it costs money, and none of us want to spend money, it works and we support initiatives like Measure M.”

As for the future, even with Measure M, unless the transit riding habits of people change we are going to continue to experience soul-crushing traffic. The way to reduce congestion is to both build the transportation infrastructure detailed in the Measure M plan *and* encourage the use of mass transportation.

In the world of state legislatures and Congress reluctant to spend money on public infrastructure including transit, understanding the LA experience is paramount. At a point in time when people have become distrustful of government and its ability to deliver on its promises to the public, the success of Measure M is critical to the American experience.

With Measure M, Metro has a chance to make the public believe again in the ability of government to be bold and do big things for a lot of people. Measure M offers nothing short of a new Los Angeles.



**“We worked really hard. You can put as many ‘reallys’ on that line as you want.”**

– Kalieh Honish  
Executive Officer of Long Range Planning,  
Metro



LA City Councilman and Metro Board Member Mike Bonin takes a turn at the microphone as dignitaries celebrate an election night victory.







**“It’s not a Democratic county. It’s a patchwork. A diverse county, 88 cities playing in the same sandbox with very different ideas about transportation. But as the final vote confirms, the average citizen of LA County was able to realize the personal benefit to them of Measure M.”**

– Heather Hills  
Former Director of Long Range Transportation Planning,  
Metro



**A special thanks goes out to all the people who were interviewed and participated in the creation of this document. It is our hope that this information will assist other agencies in their future efforts to build and maintain the infrastructure of tomorrow.**

**For more information on Measure M:**

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