



# north lake tahoe

Chamber | CVB | Resort Association

## Agenda and Meeting Notice

### THE NORTH LAKE TAHOE RESORT ASSOCIATION BOARD OF DIRECTORS

**Wednesday December 4, 2013 – 8:30 – 11 a.m.**

**Tahoe City Public Utility District Board Room**

#### NLTRA Mission

*"To promote tourism and benefit business through efforts that enhance the economic, environmental, recreational and cultural climate of the area."*

#### Meeting Ground Rules

*Be Prepared, Engage in Active Listening, Be Respectful of Others, No Surprises, It is OK to Disagree, Acknowledge Comments, but Do Not Repeat Comments*

### ITEMS MAY NOT BE HEARD IN THE ORDER THEY ARE LISTED

#### A. CALL TO ORDER - ESTABLISH QUORUM – Chair

#### B. AGENDA AMENDMENTS AND APPROVAL - MOTION

1. Agenda Additions and/or Deletions
2. Approval of Agenda

#### C. PUBLIC FORUM

Any person wishing to address the Board of Directors on items of interest to the Resort Association not listed on the agenda may do so at this time. It is requested that comments be limited to three minutes, since no action may be taken by the Board on items addressed under Public Forum.

#### D. REPORTS & ACTION ITEMS (2 hours)

##### Marketing (25 minutes)

3. Destimetrics Report – Andy Chapman (10 minutes)
4. Special Event Grant Allocation – **MOTION** Judy Laverty (15 minutes)

##### Infrastructure/Transportation (1 hour 15 minutes)

5. Transit Summit Report – Next Steps – Sandy Evans Hall (5 minutes)
6. Performing Arts Center Strategic Discussion –Ron Treabess/Sandy Evans Hall (25 minutes)
7. North Lake Tahoe Water Shuttle Report and Funding Request – **MOTION** Ron Treabess (10 minutes)
8. Dollar Creek Trail and Fanny Bridge Matching Funds – **MOTION** Ron Treabess/Peter Kraatz (15 minutes)
9. Transit System Branding – **MOTION** Ron Treabess/Jennifer Merchant (20 minutes)

#### 2013

#### Board Members

**Wally Auerbach**  
*Auerbach Engineering*

**Eric Brandt**  
*Destination Media Solutions*

**Phil GilanFarr**  
**(Chair)**  
*CB's Pizza & Grill*

**Kali Kopley (Vice-Chair)**  
*Uncorked/Petra/Soupa*

**Brendan Madigan**  
*Alpenglow Sports*

**Alex Mourelatos**  
*Mourelatos Lakeshore Resort*

**Valli Murnane**  
**(Secretary)**  
*Tahoe XCcountry*

**Ron Parson**  
**(Immediate Past Chair)**  
*Granlibakken*

**Bill Rock**  
**(Treasurer)**  
*Northstar*

**Joseph Mattioli**  
*The Ritz-Carlton*

**Jennifer Merchant**  
*Placer County*

**Kristi Boosman**  
*TRPA*  
*(Ex-officio)*

**Organization (10 minutes)**

10. Board Officer Nominations – Sandy Evans Hall (5 minutes)
11. Committee Membership Proposals, Committee Board Member Openings – Sandy Evans Hall (5 minutes)
12. Bylaw Change regarding BACC and Special Event Task Force – MOTION Sandy Evans Hall (**Super Quorum necessary – 8 board members present**)

**Membership (10 minutes)**

13. Membership Manager Report – Ginger Karl (5 minutes)
14. West Shore Association Community Grant Funding Request – **MOTION** Ginger Karl (5 minutes)

**E. DIRECTORS' COMMENTS (5 minutes)**

**F. CONSENT CALENDAR – MOTIONS (5 minutes)**

All items (**in bold**) listed under the consent calendar-motions are considered to be routine and/or have been or will be reviewed by committee, and will be approved by one motion. There will be no separate discussion of these items unless a Board member or staff person requests a specific item be removed from the consent calendar for separate consideration. Any item removed will be considered after the motion and vote to approve the remainder of consent calendar-motions.

**15. Board Meeting Minutes –November 6, 2013**

All committee meeting briefs are provided for informational purposes only. Minutes are available at [www.nltra.org](http://www.nltra.org)

16. **Joint Infrastructure/Transportation Committee – November 25, 2013**
17. **Marketing Committee – November 19, 2013**
18. **Business Association and Chamber Collaborative – November 13, 2013**
19. **Lodging Committee – November 12, 2013**
20. Conference Sales Directors Committee – No Meeting in November
21. **Finance Committee – November 21, 2013**
22. **Executive Committee Report – November 19, 2013**
23. **Financial Reports (September and October Financials)**

**1. Dashboard and project reports**

The following reports are provided on a monthly basis by staff and can be pulled for discussion by any board member

24. **Conference Sales Reports**
25. **Infrastructure/Transportation Activity Report – October**

**G. MEETING REVIEW AND STAFF DIRECTION (5 minutes)**

**H. CLOSED SESSION (If necessary) – CEO/Executive Director Review**

**I. RECONVENE TO OPEN SESSION**

**J. ADJOURNMENT**

This meeting site is wheelchair accessible.

*Posted and e-mailed, 11/2/2013*



## RESERVATIONS ACTIVITY REPORT North Lake Tahoe



Destination: North Lake Tahoe

Period: Bookings as of October 31, 2013

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### Executive Summary

Data based on a sample of up to 11 properties in the North Lake Tahoe destination, representing up to 1,535 Units ('DestiMetrics Census\*\*')

		2013/14	2012/13	Year over Year % Diff
<b>a. Last Month Performance: Current YTD vs. Previous YTD</b>				
North Lake Tahoe Occupancy for last month (October) changed by (3.4%)	Occupancy (October) :	34.4%	33.2%	3.4%
North Lake Tahoe Average Daily Rate for last month (October) changed by (17.3%)	ADR (October) :	\$175	\$149	17.3%
North Lake Tahoe RevPAR for last month (October) changed by (21.3%)	RevPAR (October) :	\$60	\$49	21.3%
<b>b. Next Month Performance: Current YTD vs. Previous YTD</b>				
North Lake Tahoe Occupancy for next month (November) changed by (4.6%)	Occupancy (November)	18.3%	17.5%	4.6%
North Lake Tahoe Average Daily Rate for next month (November) changed by (5.9%)	ADR (November) :	\$153	\$145	5.9%
North Lake Tahoe RevPAR for next month (November) changed by (10.8%)	RevPAR (November) :	\$28	\$25	10.8%
<b>c. Historical 6 Month Actual Performance: Current YTD vs. Previous YTD</b>				
North Lake Tahoe Occupancy for the prior 6 months changed by (6.5%)	Occupancy	50.4%	47.3%	6.5%
North Lake Tahoe Average Daily Rate for the prior 6 months changed by (10.7%)	ADR	\$217	\$196	10.7%
North Lake Tahoe RevPAR for the prior 6 months changed by (17.9%)	RevPAR	\$109	\$93	17.9%
<b>d. Future 6 Month On The Books Performance: Current YTD vs. Previous YTD</b>				
North Lake Tahoe Occupancy for the upcoming 6 months changed by (29.5%)	Occupancy	17.9%	13.8%	29.5%
North Lake Tahoe Average Daily Rate for the upcoming 6 months changed by (9.1%)	ADR	\$274	\$251	9.1%
North Lake Tahoe RevPAR for the upcoming 6 months changed by (41.3%)	RevPAR	\$49	\$35	41.3%
<b>e. Incremental Pacing - % Change in Rooms Booked last Calendar Month: Oct. 31, 2013 vs. Previous Year</b>				
Rooms Booked during last month (October, 2013) compared to Rooms Booked during the same period last year (October, 2012) for all arrival dates has changed by (17.2%)	Booking Pace (October)	6.1%	5.2%	17.2%

**\* DestiMetrics Census:** Total number of rooms reported by participating DestiMetrics properties as available for short-term rental in the reporting month. This number can vary monthly as inventories and report participants change over time.

**DESCRIPTION:** The Reservation Activity Outlook Report tracks occupancy, average daily rate (ADR), and revenue per available room (RevPAR); the key metrics most of interest to lodging properties. The report combines the data sets of participating properties into a destination wide view that features three data sets (providing that sufficient information is available) including: i) current YTD occupancy, ii) last YTD occupancy, iii) last season's ending occupancy.

The Reservation Activity Outlook Report is generated on a monthly basis, usually for a 12 month subscription period, and is created from data provided by a group of properties participating in a cooperative manner, and representing a valid set of data as a result.

Report results are provided only to those properties who participate by submitting their data. Additionally, participating properties can order (on an a-la-carte basis) an individual report which shows the reservation activity of their property, measured against an aggregated set of competitive properties that they choose from amongst DestiMetrics's other participants.

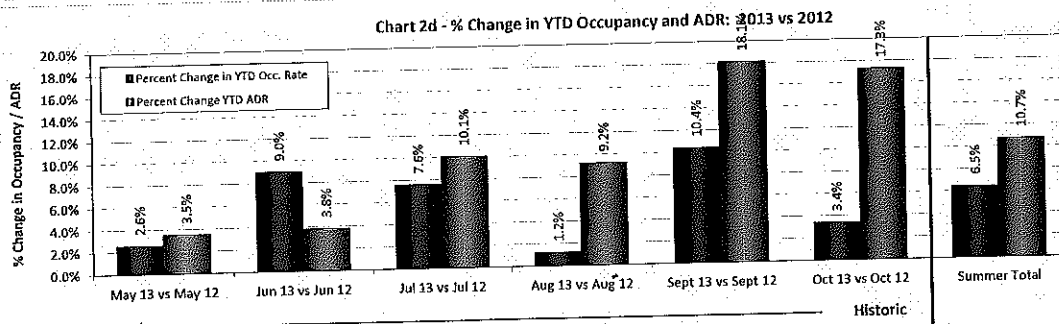
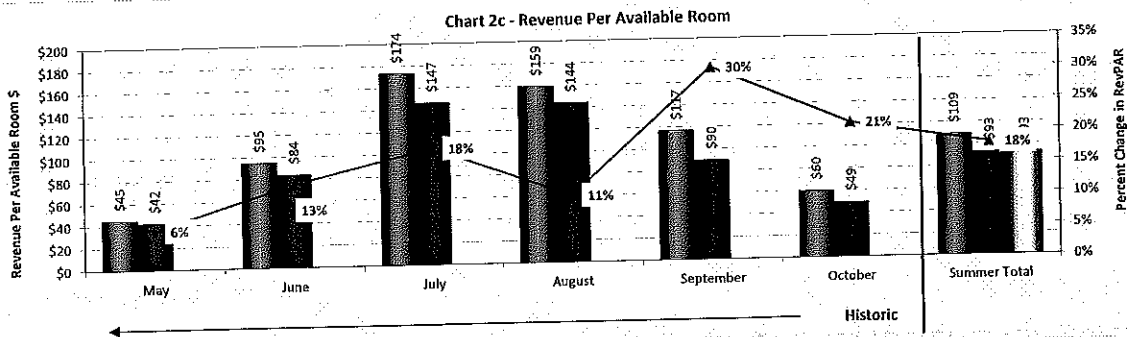
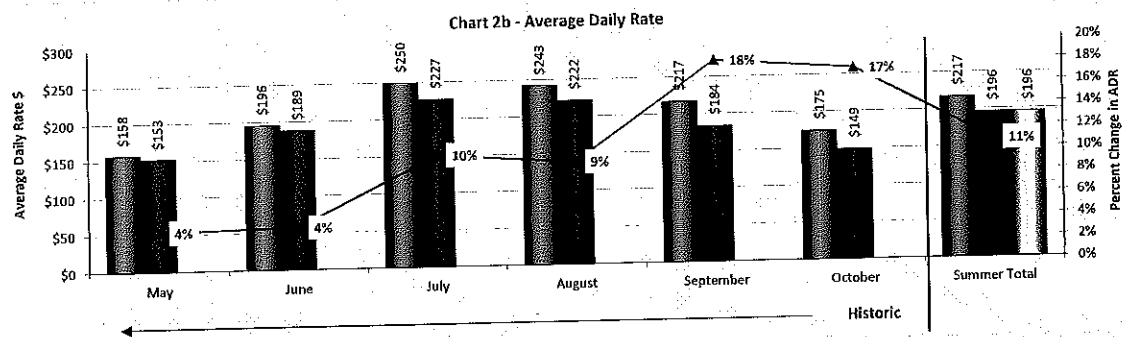
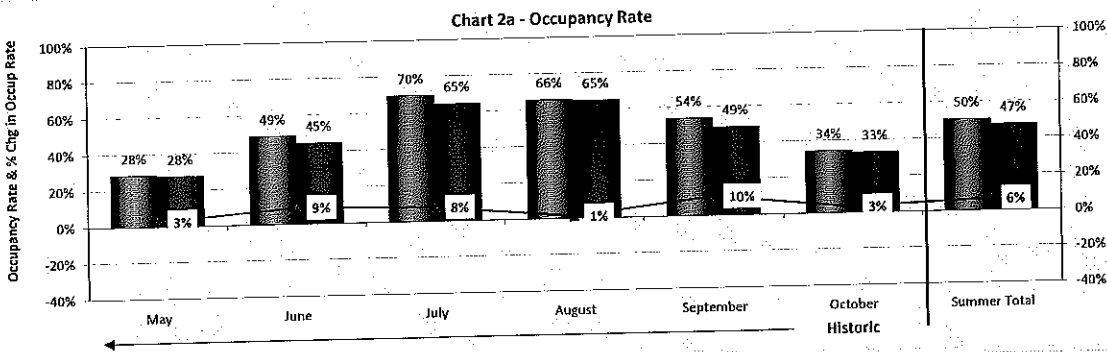
As is the case in all DestiMetrics data, all information provided by individual properties is strictly confidential, except when aggregated with other data and indistinguishable as a result.

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**RESERVATIONS ACTIVITY REPORT**  
**SECTION 2 - SUMMER SEASON SUMMARY GRAPHS**

2013 YTD (as of October 31, 2013) vs. 2012 YTD (as of October 31, 2012) vs. 2012 Historical  
 NOTE: This is not a forecast of bookings. Data represent transactions on the books as of the date noted above  
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Historic Actual (2012 season)  
 Data as of October 31, 2013 (2013 season)  
 Data as of October 31, 2012 (2012 season)  
 Percent Change

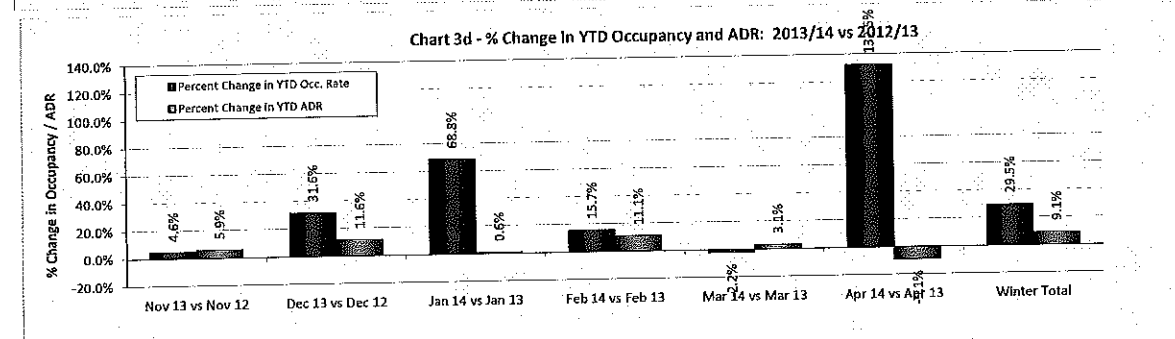
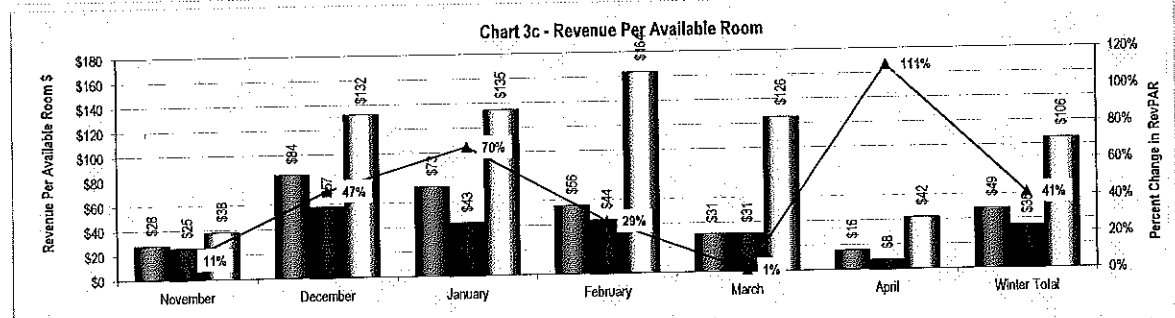
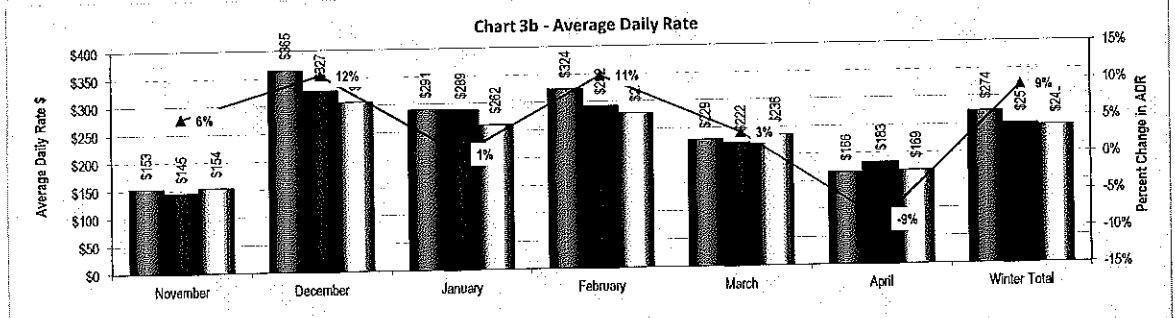
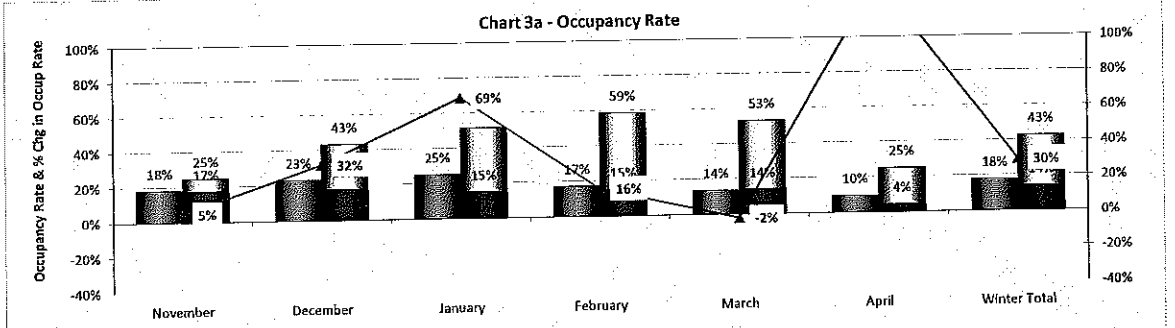




## RESERVATIONS ACTIVITY REPORT SECTION 3 - WINTER SEASON SUMMARY GRAPHS

**2013/14 YTD (as of October 31, 2013) vs. 2012/13 YTD (as of October 31, 2012) vs. 2012/13 Historical**  
 NOTE: This is not a forecast of bookings. Data represent transactions on the books as of the date noted above  
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Historic Actual (2012/13 season)    
  Data as of October 31, 2013 (2013/14 season)  
 Data as of October 31, 2012 (2012/13 season)    
  Percent Change





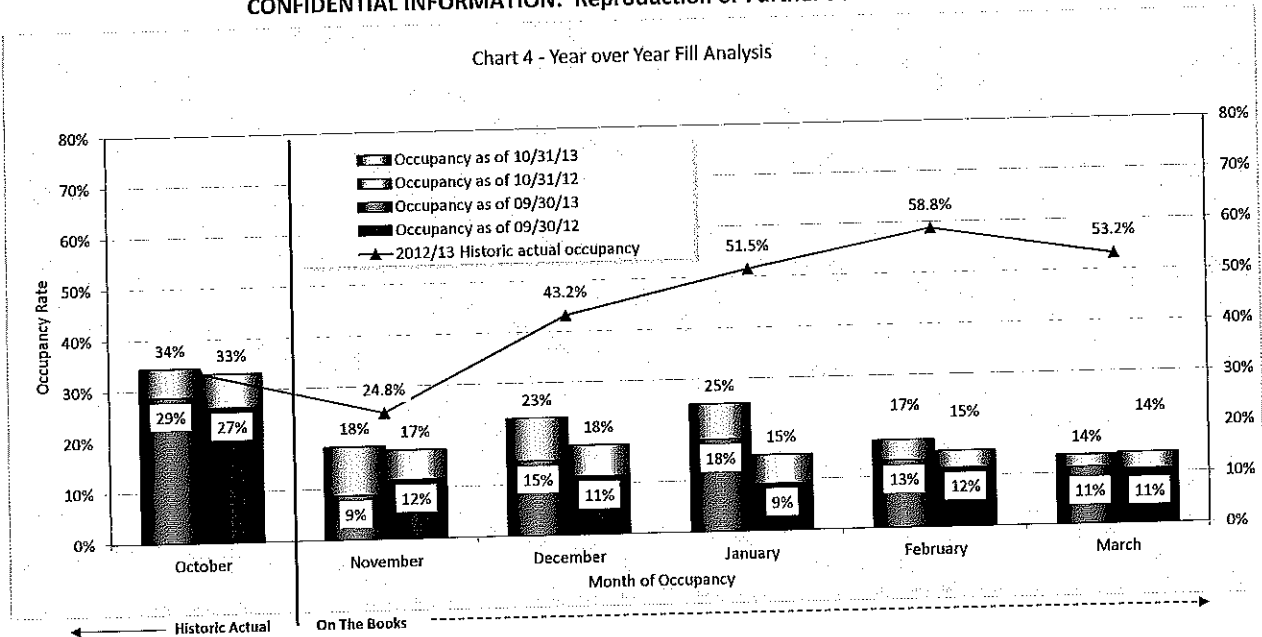
**RESERVATIONS ACTIVITY REPORT**  
SECTION 4 - FILL ANALYSIS

**2013/14 Occupancy Pace (as of October 31, 2013) vs. 2012/13 Pace (as of October 31, 2012) vs. same period 2012/13**

NOTE: This is not a forecast of bookings. Data represent transactions on the books as of the date noted above

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Chart 4 - Year over Year Fill Analysis



Supporting Table for Chart 4 & Change in Incremental Fill

Month of Occupancy:	OCCUPANCY AS OF OCT 31			OCCUPANCY AS OF SEP 30			INCREMENTAL OCCUP. BOOKED (i.e. FILL DURING MONTH JUST ENDED)		CHG IN INCREMENTAL OCCUP. BOOKED (i.e. CHANGE IN FILL)		2012/13 Historic actual occupancy
	Occupancy as of 10/31/13	Occupancy as of 10/31/12	Absolute Change	Occupancy as of 09/30/13	Occupancy as of 09/30/12	Absolute Change	Incremental occupancy booked during Oct. 2013	Incremental occupancy booked during Oct. 2012	Absolute Change in Incremental Fill	Percent Change in Incremental Fill**	
	October	34.4%	33.2%	1.1%	28.6%	26.6%	2.1%	5.7%	6.7%	-0.9%	
November	18.3%	17.5%	0.8%	8.7%	11.6%	-2.9%	9.6%	5.9%	3.7%	62.9%	24.8%
December	23.1%	17.6%	5.6%	14.7%	11.4%	3.2%	8.5%	6.1%	2.3%	37.9%	43.2%
January	25.1%	14.9%	10.2%	18.1%	9.2%	8.9%	7.0%	5.7%	1.3%	23.5%	51.5%
February	17.3%	14.9%	2.3%	13.2%	11.6%	1.6%	4.1%	3.4%	0.7%	21.5%	58.8%
March	13.6%	13.9%	-0.3%	11.2%	10.7%	0.5%	2.4%	3.2%	-0.9%	-26.2%	53.2%
<b>Total</b>	<b>22.2%</b>	<b>18.8%</b>	<b>3.4%</b>	<b>16.1%</b>	<b>13.5%</b>	<b>2.5%</b>	<b>6.1%</b>	<b>5.2%</b>	<b>0.9%</b>	<b>17.2%</b>	<b>44.0%</b>

\*\*Based on providing complete pacing data within a given month of occupancy only. Results may differ from those presented elsewhere in report if property set differs."

\*\*Results for "percent change in incremental fill" indicate how room nights booked during the month just ended compare to room nights booked during the same month in the prior year, for occupancy in the month just ended and for the upcoming five months (as well as the six-month period in total). These results provide an indication of the degree to which booking activity occurring during the month just ended was greater or less than booking activity occurring in the same month a year ago -- i.e. a measure of the strength of booking activity occurring during the month just ended.



**RESERVATIONS ACTIVITY REPORT**  
**SECTION 5A - SUPPORTING DATA TABLES**  
**Bookings as of October 31, 2013**

NOTE: This is not a forecast of bookings. Data represent transactions on the books as of the date noted above  
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OCCUPANCY RATE	OCCUPANCY RATE: YTD 2013/14 VS. YTD 2012/13			Historic Actual Occup. Rate (2012/13 season)	# of Properties in Sample
	Month of Occupancy (2013/14 & 2012/13)	Occup. Rate as of: October 31, 2013 (2013/14 season)	Occup. Rate as of: October 31, 2012 (2012/13 season)		
May	28.5%	27.7%	2.6%		11
June	48.6%	44.6%	9.0%		11
July	69.5%	64.6%	7.6%		11
August	65.8%	65.0%	1.2%		11
September	53.8%	48.8%	10.4%		11
October	Historic Actual 34.4%	33.2%	3.4%		11
November	On the Books 18.3%	17.5%	4.6%	24.8%	11
December	23.1%	17.6%	31.6%	43.2%	11
January	25.1%	14.9%	68.8%	51.5%	11
February	17.3%	14.9%	15.7%	58.8%	11
March	13.6%	13.9%	-2.2%	53.2%	11
April	9.6%	4.1%	132.5%	25.0%	11
Grand total	35.2%	30.7%	14.6%	45.0%	11
Historic months total	50.4%	47.3%	6.5%	47.3%	11
On the Books months total	17.9%	13.8%	29.5%	42.7%	11

AVERAGE DAILY RATE	ADR: YTD 2013/14 VS. YTD 2012/13			Historic Actual ADR (2012/13 season)	# of Properties in Sample
	Month of Occupancy (2013/14 & 2012/13)	ADR as of: October 31, 2013 (2013/14 season)	ADR as of: October 31, 2012 (2012/13 season)		
May	\$158	\$153	3.5%		11
June	\$196	\$189	3.8%		11
July	\$250	\$227	10.1%		11
August	\$243	\$222	9.2%		11
September	\$217	\$184	18.1%		11
October	Historic Actual \$175	\$149	17.3%		11
November	On the Books \$153	\$145	5.9%	\$154	11
December	\$365	\$327	11.6%	\$306	11
January	\$291	\$289	0.6%	\$262	11
February	\$324	\$292	11.1%	\$279	11
March	\$229	\$222	3.1%	\$236	11
April	\$166	\$183	-9.1%	\$169	11
Grand total	\$230	\$208	10.7%	\$220	11
Historic months total	\$217	\$196	10.7%	\$196	11
On the Books months total	\$274	\$251	9.1%	\$248	11

REVENUE PER AVAILABLE ROOM	RevPAR: YTD 2013/14 VS. YTD 2012/13			Historic Actual RevPAR (2012/13 season)	# of Properties in Sample
	Month of Occupancy (2013/14 & 2012/13)	RevPAR as of: October 31, 2013 (2013/14 season)	RevPAR as of: October 31, 2012 (2012/13 season)		
May	\$45	\$42	6.2%		11
June	\$95	\$84	13.2%		11
July	\$174	\$147	18.4%		11
August	\$159	\$144	10.6%		11
September	\$117	\$90	30.4%		11
October	Historic Actual \$60	\$49	21.3%		11
November	On the Books \$28	\$25	10.8%	\$38	11
December	\$84	\$57	46.9%	\$132	11
January	\$73	\$43	69.8%	\$135	11
February	\$56	\$44	28.5%	\$164	11
March	\$31	\$31	0.8%	\$126	11
April	\$16	\$8	111.4%	\$42	11
Grand total	\$81	\$64	26.8%	\$99	11
Historic months total	\$109	\$93	17.9%	\$93	11
On the Books months total	\$49	\$35	41.3%	\$106	11



**RESERVATIONS ACTIVITY REPORT**  
**SECTION 5b - SUPPORTING SUMMER DATA TABLES**  
**Summer Bookings as of October 31, 2013**

**NOTE:** This is not a forecast of bookings. Data represent transactions on the books as of the date noted above

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OCCUPANCY RATE	<i>OCCUPANCY RATE: YTD 2013 VS. YTD 2012</i>			Historic Actual Occup. Rate (2012 season)
	Occup. Rate as of: October 31, 2013 (2013 season)	Occup. Rate as of: October 31, 2012 (2012 season)	Percent Change in YTD Occ. Rate	
Month of Occupancy (2013 & 2012)				
May	28.5%	27.7%	2.6%	
June	48.6%	44.6%	9.0%	
July	69.5%	64.6%	7.6%	
August	65.8%	65.0%	1.2%	
September	53.8%	48.8%	10.4%	
October <b>Historic Actual</b>	34.4%	33.2%	3.4%	
Summer Total	50.4%	47.3%	6.5%	47.3%

AVERAGE DAILY RATE	<i>ADR: YTD 2013 VS. YTD 2012</i>			Historic Actual ADR (2012 season)
	ADR as of: October 31, 2013 (2013 season)	ADR as of: October 31, 2012 (2012 season)	Percent Change YTD ADR	
Month of Occupancy (2013 & 2012)				
May	\$158	\$153	3.5%	
June	\$196	\$189	3.8%	
July	\$250	\$227	10.1%	
August	\$243	\$222	9.2%	
September	\$217	\$184	18.1%	
October <b>Historic Actual</b>	\$175	\$149	17.3%	
Summer Total	\$217	\$196	10.7%	\$196

REVENUE PER AVAILABLE ROOM	<i>REVPAR: YTD 2013 VS. YTD 2012</i>			Historic Actual RevPAR (2012 season)
	RevPAR as of: October 31, 2013 (2013 season)	RevPAR as of: October 31, 2012 (2012 season)	Percent Change in YTD RevPAR	
Month of Occupancy (2013 & 2012)				
May	\$45	\$42	6.2%	
June	\$95	\$84	13.2%	
July	\$174	\$147	18.4%	
August	\$159	\$144	10.6%	
September	\$117	\$90	30.4%	
October <b>Historic Actual</b>	\$60	\$49	21.3%	
Summer Total	\$109	\$93	17.9%	\$93





**RESERVATIONS ACTIVITY REPORT**  
**SECTION 5c - SUPPORTING WINTER DATA TABLES**  
**Winter Bookings as of October 31, 2013**

NOTE: This is not a forecast of bookings. Data represent transactions on the books as of the date noted above

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OCCUPANCY RATE	<u>OCCUPANCY RATE: YTD 2013/14 VS. YTD 2012/13</u>			Historic Actual Occup. Rate (2012/13 season)
	Occup. Rate as of: October 31, 2013 (2013/14 season)	Occup. Rate as of: October 31, 2012 (2012/13 season)	Percent Change in YTD Occ. Rate	
Month of Occupancy (2013/14 & 2012/13)				
November	18.3%	17.5%	4.6%	24.8%
December	23.1%	17.6%	31.6%	43.2%
January	25.1%	14.9%	68.8%	51.5%
February	17.3%	14.9%	15.7%	58.8%
March	13.6%	13.9%	-2.2%	53.2%
April	9.6%	4.1%	132.5%	25.0%
Winter Total	17.9%	13.8%	29.5%	42.7%

AVERAGE DAILY RATE	<u>ADR: YTD 2013/14 VS. YTD 2012/13</u>			Historic Actual ADR (2012/13 season)
	ADR as of: October 31, 2013 (2013/14 season)	ADR as of: October 31, 2012 (2012/13 season)	Percent Change in YTD ADR	
Month of Occupancy (2013/14 & 2012/13)				
November	\$153	\$145	5.9%	\$154
December	\$365	\$327	11.6%	\$306
January	\$291	\$289	0.6%	\$262
February	\$324	\$292	11.1%	\$279
March	\$229	\$222	3.1%	\$236
April	\$166	\$183	-9.1%	\$169
Winter Total	\$274	\$251	9.1%	\$248

REVENUE PER AVAILABLE ROOM	<u>REVPAR: YTD 2013/14 VS. YTD 2012/13</u>			Historic Actual RevPAR (2012/13 season)
	RevPAR as of: October 31, 2013 (2013/14 season)	RevPAR as of: October 31, 2012 (2012/13 season)	Percent Change in YTD ADR	
Month of Occupancy (2013/14 & 2012/13)				
November	\$28	\$25	10.8%	\$38
December	\$84	\$57	46.9%	\$132
January	\$73	\$43	69.8%	\$135
February	\$56	\$44	28.5%	\$164
March	\$31	\$31	0.8%	\$126
April	\$16	\$8	111.4%	\$42
Winter Total	\$49	\$35	41.3%	\$106



**MULTI-DESTINATION COMPARATIVE REPORT**  
**North Lake Tahoe**

Destination: North Lake Tahoe

Period: Bookings as of October 31, 2013

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**Executive Summary**

Overview Based on data from 16 reporting DestiMetrics Destinations (see Destination Listing at bottom of page 7)

	High	Low	Average	North Lake Tahoe
<b>a. Last Month Occupancy: Industry-Wide High / Low and Average for Month vs North Lake Tahoe Occupancy</b>				
Historic Actual Occupancy for Last Month	35.9%	5.8%	21.8%	34.4%
% Change in Historic Actual Occupancy for Last Month	34.5%	-17.9%	9.1%	3.4%
<b>b. Last Month ADR: Industry-Wide High / Low and Average for Month vs North Lake Tahoe ADR</b>				
Historic Actual Average Daily Rate for Last Month	\$163	\$86	\$139	\$175
% Change in Historic Actual Average Daily Rate for Last Month	13.5%	-0.6%	8.0%	17.3%
<b>c. Next Month Occupancy: Industry-Wide High / Low and Average for Month vs North Lake Tahoe Occupancy</b>				
Occupancy On-The-Books for Next Month	37.4%	4.5%	13.4%	18.3%
% Change in Occupancy On-The-Books for Next Month	83.0%	-19.8%	7.4%	4.6%
<b>d. Next Month ADR: Industry-Wide High / Low and Average for Month vs North Lake Tahoe ADR</b>				
Average Daily Rate On-The-Books for Next Month	\$200	\$120	\$145	\$153
% Change in Average Daily Rate On-The-Books for Next Month	14.1%	-13.5%	2.9%	5.9%

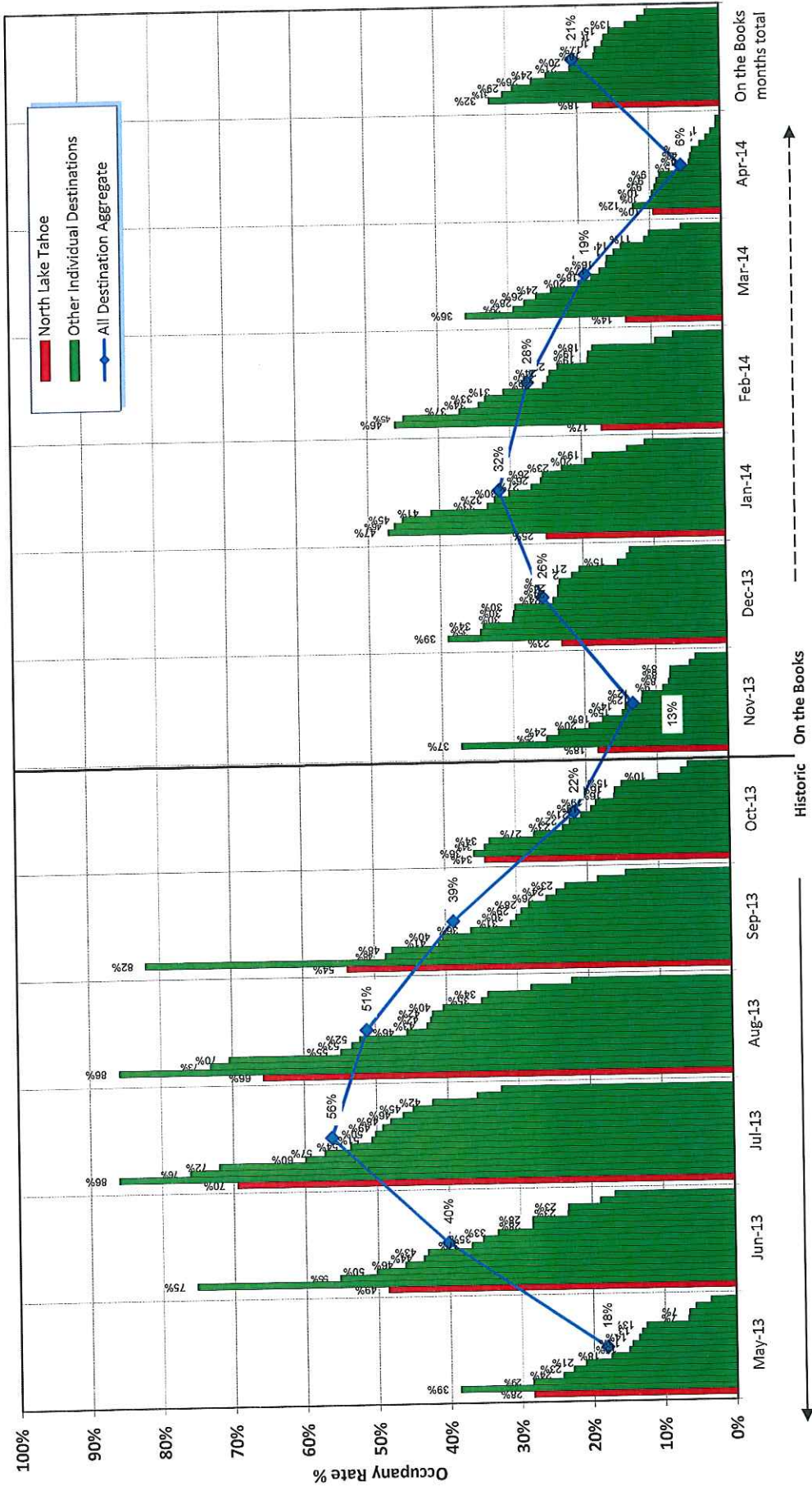
DESCRIPTION: The Multi Destination Comparative Report compares occupancy and average daily rate (ADR) between the Base Destination and all other DestiMetrics reporting destinations. In all cases, the Base Destination is represented on the far left of the tables and the far left of the charts. The Base Destination is differentiated on charts with a Red data series bar. All other Destinations are represented with a Green data series bar.

All data is sorted in descending order from highest to lowest and left to right, with the all destination average on the far right of the tables. All destination average is differentiated on charts by a blue line data set.

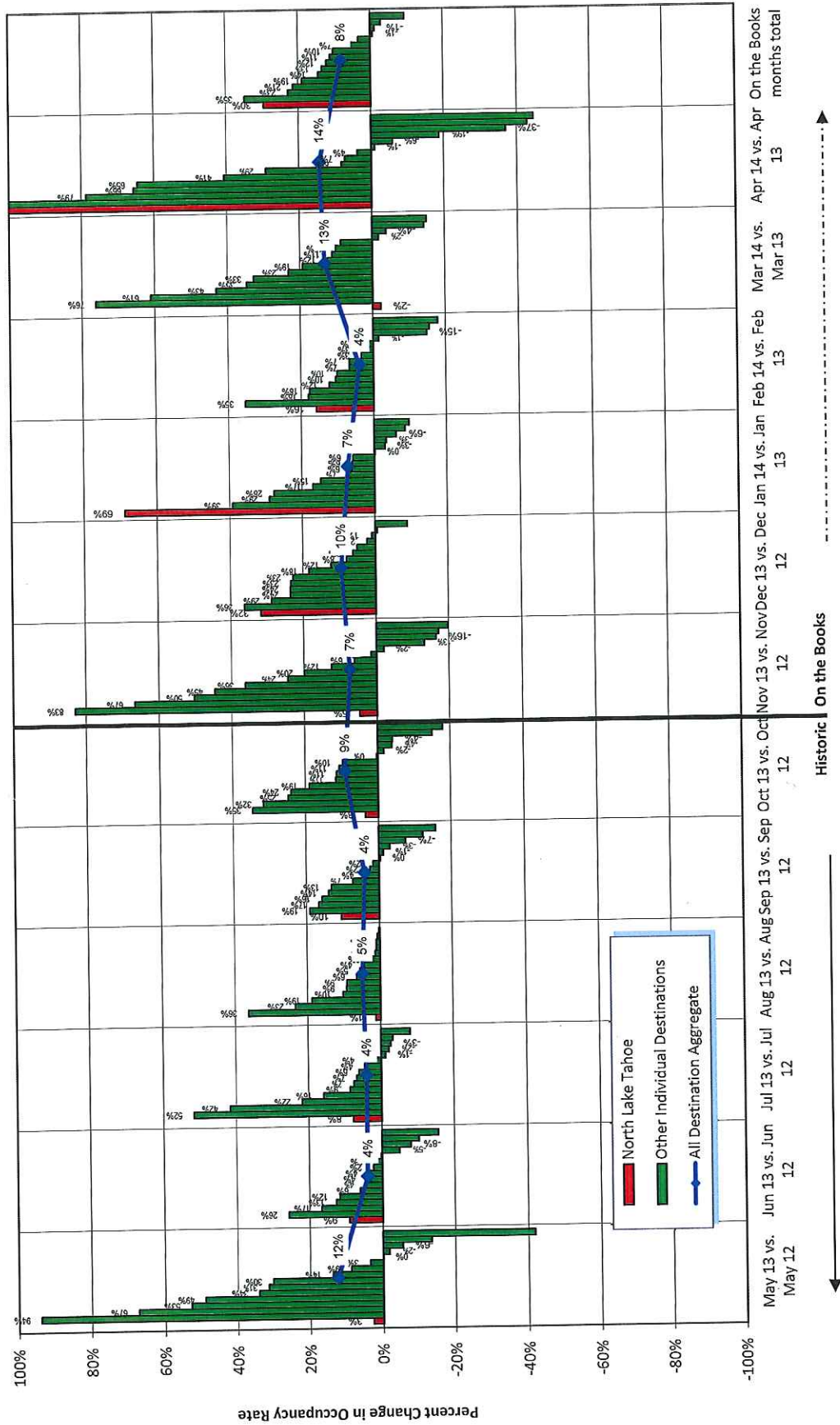
Individual destination data may be obtained through the Multi-Destination Comparative Enhanced report, available by contacting DestiMetrics at the address below

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**Occupancy Rate 2013/2014 Season as of Oct 31, 2013**  
**Historic and On the Books Data**  
**North Lake Tahoe vs All Individual Mtn Destinations & All Destination Aggregate**



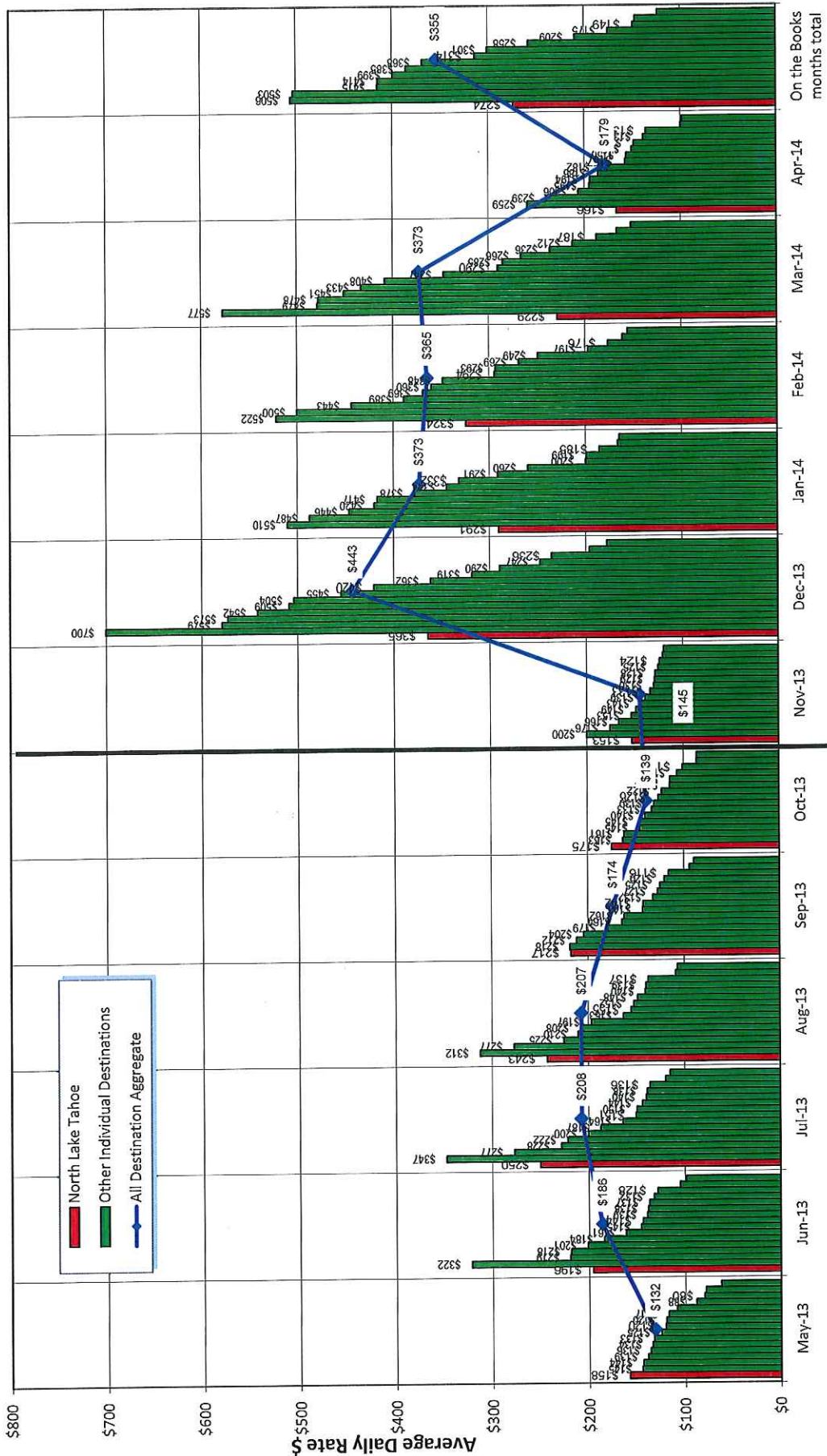
**Percent Change in Occupancy Rate: 2013/2014 YTD vs 2012/2013 as of October 31, 2013**  
**North Lake Tahoe vs All Individual Mtn Destinations & All Destination Average**



# Average Daily Rate 2013/2014 Season as of Oct 31, 2013

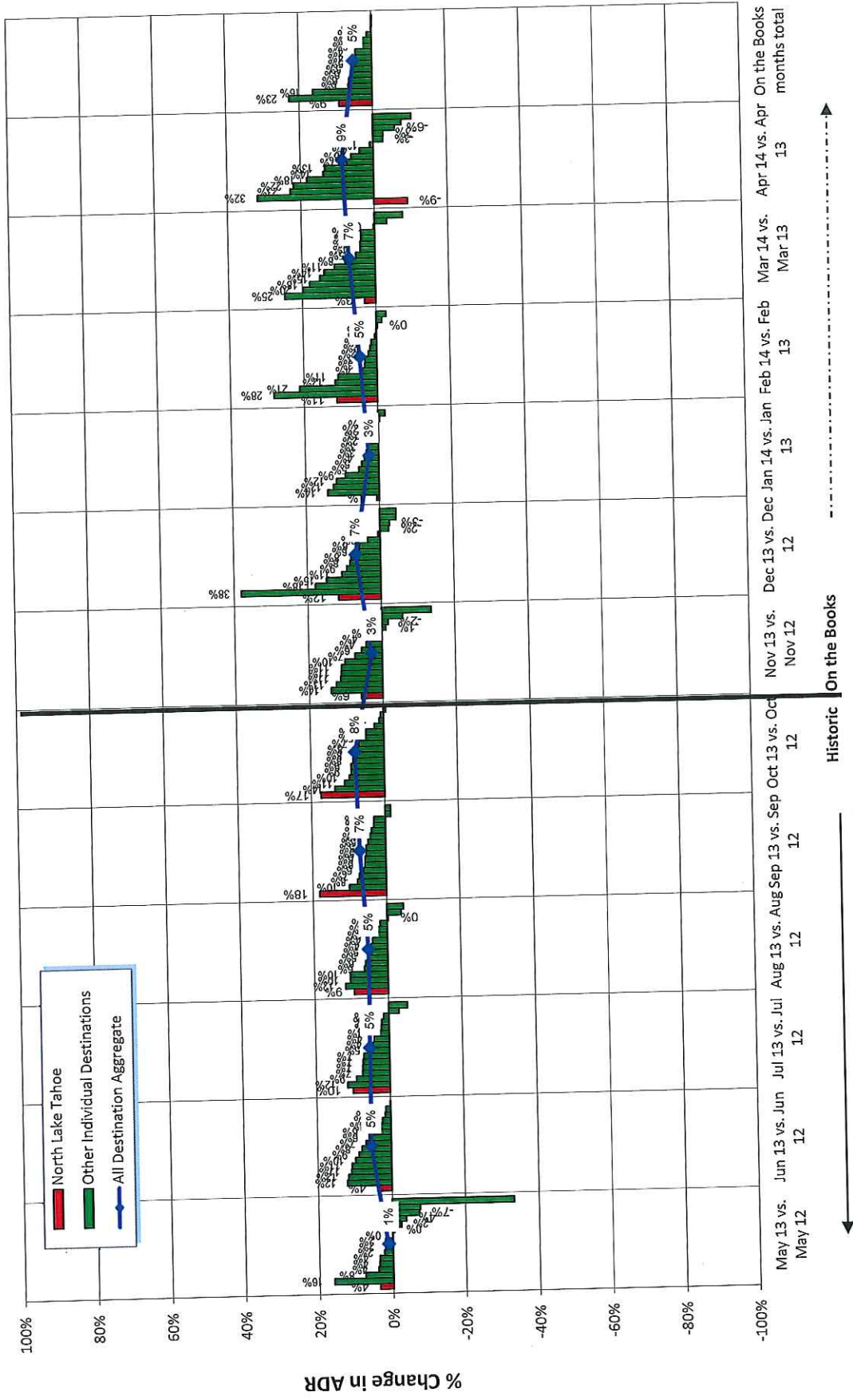
## Historic and On the books Data

### North Lake Tahoe vs All Individual Mtn Destinations & All Destination Aggregate



Historic On the Books

**Percent Change in Average Daily Rate: 2013/2014 YTD vs 2012/2013 as of October 31, 2013**  
**North Lake Tahoe vs all Individual Mtn Destinations & All Destination Average**









**2013-2014 Special Event Grant Funding Recommendations**  
**ROUND ONE**  
**November 15, 2013**

Members of the Grant Task Force in attendance: Christy Beck, Phil Gilanfarr, Kevin Hickey, Michael Gelbman, Kali Kopley, Julie Maurer. Staff: Sandy Evans-Hall (absent) Andy Chapman (absent) Judy Laverty (present)

On November 15, the Grant Task Force convened to review and interview 17 grant applicants. A total of \$51,776.00 is available for funding and a total of \$57,500 was applied for. A total amount of \$42,500 has been recommended for funding in this round, leaving a balance of \$9,376.00 for round two in the spring of 2014.

**PLEIN AIR PAINTING EVENT – September 2-7, 2014, Regional and Northstar**

A three day outdoor painting event that will culminate with a show and sale in conjunction with the Autumn Food & Wine Festival September 5-7. Event draws artists from all over our feeder market and generates overnight stays. Prior plein air painting events were very successful but suffered from “volunteer burn-out.” Event will be promoted in conjunction with the Autumn Food and Wine Festival as well as on their own. Good fit with our cultural and heritage tourism initiatives.

**Requested        \$2,500**  
**Recommended   \$2,500**

**8<sup>TH</sup> ANNUAL TA-HOE NALU STAND UP PADDLE FESTIVAL August 15-17, 2014**

This event is now well established and has been branded “The oldest and largest SUP festival in the country.” Producer has cash sponsors lined up and projects significant income from the vendor village. The 2013 festival generated 400 athletes and 4,000 spectators over the three day event. Room nights attributed directly to this event is difficult to track at it is held on a peak weekend in August. A call for “Cool-Deals” yielded no response from lodging as everyone was booked out and did not want to discount their rates.

NLTRA marketing and grant funding has funded this event consistently since its inception 8 years ago. Recommended against cash funding, but Event Staff will work with event producer on a strong in-kind basis.

**Requested: \$5,000**  
**Recommended: 0 Cash, strong in-kind**

**TAHOE FAT TIRE FESTIVAL September 13-14, 2014, Squaw Valley**

The focus of this festival is to establish a TAMBA signature event, drawing mountain bikers into the region and generating overnight stays. The goal of the festival is to fundraise to fund a back country bike trail wayfinding signage project. The 2013 event increased spectators and participants in the Village by condensing the venue and adding a jump event in the Village. The Village at Squaw Valley will develop a trackable room block for the 2014 event. This event fits perfect with our Human Powered Sports initiative.

**Requested \$2,500**  
**Recommended \$2,500**

**Disabled Sports USA April 1-5, 2014**

This ski event for disabled athletes is closely aligned with the Wounded Warrior Project. All expenses are paid for the athletes, and the Hyatt donates comp rooms and heavily discounted rates; Squaw and Alpine donate lift tickets; and Squaw does food and beverage at cost. Most attendees are from out of town, but lodge at the Hyatt.

This event was funded for the past two years, with no available rooms tracking, and shows no growth potential for lodging outside of the host hotel. The Village will take a look at matching the rates and comps offered by the Hyatt to get the lodging moved to Placer County. The committee will review next years' results in anticipation of another request for funding.

**Requested \$2,500**  
**Recommended -0-**

**OLYMPIC HERITAGE CELEBRATION January 11-19, 2014, West Shore**

Sierra State Parks Foundation produces this event and has been grant funded for the past four years. Funding is used to print rack cards, PR, eblasts and social to bring focus on our Olympic XC Trails. This being an Olympic year, Staff will work closely with the producer to make sure the connection between Tahoe and the Olympics are highlighted. Additionally this is also supported and co-produced by the West Shore Association.

**Requested: \$2,500**  
**Recommended \$2,500**

**PASSPORT TO DINING November 13, 2014, Kings Beach**

The 2013 event appears to have been a major success with over 600 tickets sold. The event was held the evening before the funding presentation, so final room tracking and other statistics were not available. Preliminary tracking came in at 7 room nights. The event is held mid-week in a desirable strike zone, and if it proves to not generate that many overnight stays, it definitely gives the visitor who is already here a great event to attend and possibly drive future stays. Producer will target deeper in the Loomis, Auburn and Placerville region next year and will utilize their relationship with the Placer County Vintners Association to promote through their database.

**Requested \$2,500**  
**Recommended \$1,000**

**Lake Tahoe Dance Festival July 15-17, 2014**

**Gatekeepers**

The 2013 festival saw sold out performances, record audiences, and generated 35% out of town ticket sales. The event is held mid-week and generated a significant amount of local and regional press.

The Dance Festival mission is to establish a professional level ballet company where young, local dancers and students collaborate with professionals from around the

country to share classical and contemporary dance and performance within the community. This event is another that reinforces our cultural and heritage tourism marketing. Room nights are difficult to track but producer will work closely with Staff to put together a Cool-Deals campaign to enable tracking.

The task force was very much united in strong support of and has confidence for the future of the festival.

**Requested: \$2,500**  
**Recommended \$3,750**

**Rahives Banzai Tour Feb & March 2014 – Alpine, Squaw, Sugar Bowl**

This will be the third year of funding for the tour. The event producer is targeting 80-100 entries per tour stop, and each entry would account for 2.5 visitors. Event receives significant press through Powder, Squaw Magazine, local print and broad exposure through social and electronic channels. Producer is working on a cross promotion with Alaska Air as they promo their non-stop service. Nate Holland is the Tour snowboard ambassador who will generate pr through his relationship with Snowboard Magazine. Ads will also be taken out in Alaska Air Magazine and Powder Magazine and the publishers will accompany the ads with advertorial.

It is assumed most lodging went to Truckee and Squaw due to the proximity of the three ski areas.

**Request: \$7,500**  
**Recommended: \$5,000**

**The Great Ski Race – March 2, 2014 Tahoe City to Truckee**

This event is the primary fundraiser for the Tahoe Nordic Search and Rescue Organization, which is staffed by all volunteers and is the First Responder search and rescue team. 40% of the participants in the race are from out of the area and in the average number of skiers over the past 10 years is 925. The race has, in the past, hosted up to 1100 participants, but snow conditions in the past two years have compressed that figure and in 2012 and the race was cancelled due to lack of snow. The producers are targeting 750+ participants for the 2014 race. This is the largest XC event west of the Mississippi only the Birkebeiner in Wisconsin is larger at 10,000 participants. Staff had a number of recommendations to producers to strengthen the numbers by cross promoting with other races, target ski clubs, etc. This race fits perfectly with our Human Powered Sports Initiative and give us a great story to talk about to the press.

**Requested \$2,500**  
**Recommended \$3,750**

**Squaw Valley Institute Luminary Speaker Series - Annually**

This will be the third year for funding the SVI series. In 2013 SVI produced 10 events with some very newsworthy speakers, innovative events (Americas Cup dinner) and the events generate retail, restaurant and lodging revenues. The speaker series also

supports our cultural and heritage marketing initiatives. Funding is normally used for the production of rack cards and media buys.

**Requested: \$5,000**  
**Recommended \$3,000**

**Tahoe City Grill Fest, October 2014**

The inaugural Grill Fest generated 350 attendees and was well received by the community. The 2013 grant was seed money to get this event started, and second year funding falls into that category as well. It is undetermined at this early date if this event will generate lodging stays. However, as with a number of other events, it gives our visitors who are already here something different to do in a typical shoulder season.

**Requested \$2,000**  
**Recommended \$1,000**

**Truckee Tahoe Air Show July 12, 2014**

This event is primarily a Truckee event, even though it is held in Placer County. The event producers have a budget of \$130,000 and all proceeds go to local youth programs. The event would certainly be staged with or without funding from the grant fund, and the committee felt the grant funds would have more impact on events that truly needed funding in order to succeed. NLTRA would certainly support this event with pr, social and in-kind support.

**Requested: \$5,000**  
**Recommended -0-**

**Tahoe Trail Running and Kings Beach Open Water Swim - Summer 2014**

The Trail Running Series spans a period of June to October 2014 and encompasses 12 trail running events. This series showcases North Tahoe as a great running destination, generating overnight stays, and helps position the region as a Human Powered Sports Destination. This is the final year for funding of this event. Todd Jackson, Producer

**Requested: \$3,000**  
**Recommended \$3,000**

**Kings Beach Open Water Swim September 2014**

Open Water Swim participation is a growing sport and the producer is working diligently to feature North Lake Tahoe and Eastern Placer County as a great swimming destination. It also piggybacks on the open water training aspect for IRONMAN Lake Tahoe. This event was funded last year, but was cancelled due to conditions, and the funding was returned to the grant pool. Again, this event fits perfectly with our Human Powered Sports Initiative. Todd Jackson, producer.

**Requested \$1,500**  
**Recommended \$1,500**

**Lake Tahoe Triathlon, Duathlon and Open Water Swim August 22-24, 2014**

This event is held on the West Shore at Sugar Pine State Park and features sprint, Olympic and Half Triathlon and Duathlon distances plus a 3 length open water swim. It showcases the West Shore, the trails of Sugar Pine and the beauty of Emerald Bay and has the ability to generate return overnight stays. The event occurs in the strike zone when business starts to slow after school starts. The Human Powered Sports Initiative is a strong focal point in this event. Todd Jackson, Producer

**Requested: \$3,000**

**Recommended \$3,000**

**“Cusp of Glory: A Tahoe Coach’s Legacy” Premiere January 19, 2014**

This is a film premier that dramatizes the dedication and hard work of all Olympic hopefuls. The measurement of success of this premiere is for the writer/producer to find a distributor for the film. Staff felt this grant did not fit into the funding criteria. It will be recommended the producer collaborate with Squaw Valley Institute for the premiere.

**Requested: \$2,500**

**Recommended -0-**

**Tahoe Mountain Sports Pro/Am Disc Golf Tournament June 21, 26-29, 2014**

The purpose of this request is to fund the promotion and production of an A-Tier Disc Golf Championship, paving the way to eventually hosting the PDGA World Championships. In a 2012 unsuccessful bid submitted by Staff and the local Disc Golf LOC, we did not win the championships due to the fact our LOC, (although extremely experienced tournament directors) did not have the background of producing A-Tier tournaments, a requirement for hosting the Championships.

Interestingly enough, a few days after the grant funding interviews, the producer, David Polivy, received word that Tahoe has been chosen for its first A-Tier Tournament for 2014. These tournaments will directly drive trackable overnight stays, and will give us a the margin we need to win the next PDGA World Championships, thereby establishing Tahoe as a world class Disc Golf Destination.

**Requested: \$10,000**

**Recommended: \$10,000**

Grant Funding Schedule of Presentations  
15-Nov-13

TIME	APPLICANT	EVENT	EVENT DATE	REQUEST	2011/2012	2012-2013	2013-2014	GRANTED	NOTES
8:40 AM	Kellie Cutler	North Tahoe Plain Air Event	September 2-7, 2014	\$2,500	NONE				
8:55 AM	Ernie Brassard	Tahoe Nalu Paddle Festival	Aug 15-17, 2014	\$5,000	\$2,500	\$2,500			
9:10 AM	Kevin Joell	Tahoe Fat Tire Festival	Sept. 13-14, 2014 (tentative)	\$2,500	\$1,500	\$1,500			
9:25 AM	Haakon Lang-Ree	Ability Celebrations	April 1-5, 2014	\$2,500	\$864	\$1,000			
9:40 AM	Heldi Doyle	Olympic Heritage Celebration	January 11-19, 2014	\$2,500	\$1,500	\$1,000			
9:55 AM	Joy Doyle	Passport to Dining	November 13, 2014	\$2,500	DNA	\$1,000			
10:10 AM	Christin Hanna	Lake Tahoe Dance Festival	July 15-17, 2014	\$2,500	\$2,500	\$2,000			
10:25 AM	Daron Rahives	2014 Rahives' Banzai Tour (RBT)	Feb and March 2014	\$7,500	\$4,500	\$5,000			
10:40 AM	<b>BREAK</b>								
10:55 AM	Chris McConnell	The Great Ski Race	Sunday, March 02, 2014	\$2,500	\$1,000	DNA			
11:10 AM	Renee Kojjane	SVI 2014 Luminary Programming	2014	\$5,000	\$5,000	\$3,000			
11:25 AM	Steve Hoch	Tahoe City Grill Fest	October TBD, 2014	\$2,000	\$1,000				
11:40 AM	Christy Lee/Andrea Cree	Lake Tahoe Flow Arts Festival	Sept. 2-4, 2014						
	<b>LUNCH BREAK</b>								
12:25 PM	Margaret Skillicorn	Truckee Tahoe AirFair & Family Festival	Saturday, July 12, 2014	\$5,000	DNA	DNA			
12:40 PM	Todd Jackson	Tahoe Trail Running/Kings Beach Open Water Swim	Summer '14/TBD	\$3000/\$1500	\$3000/\$1500	\$5,000			This line item includes 2 application.
12:55 PM	Todd Jackson	Lake Tahoe Triathlon, Duathlon and Open Water Swim	Aug. 22,23 and 24, 2014	\$3,000	\$500	\$0			
1:10 PM	Sherrie Oakley	Cusp of Glory: A Tahoe Coach's Legacy Premiere	January 19, 2014	\$2,500	DNA	DNA			
1:25 PM	David Polivy	Tahoe Mountain 8th Annual Pro Disc Golf Tournament	June 21,26-29, Oct 11-12, 2014	\$10,000	\$1,500	\$2,500			
		<b>Total</b>		<b>\$57,500</b>					

## Next Steps

### Short Term Solutions

#### Outreach

- Messaging needs to be targeted to various markets: local riders, visitors, and voters
- Expand the participants in the coalition and outreach committee
- Promote the current Nextbus.com service for mobile phones
- Utilize local radio to extend messaging
- Get data about who the riders are and what their expectations are – survey visitors, employees, current riders

#### Service Enhancements

- Improve quality of bus stops
- Survey visitors to identify what improvements they would like to see in the transit service
- Develop a carpool network
- Create express bus service between Tahoe City and Truckee
- Consolidate information into Brand for transportation in NLT, create one brand for entire system
- Extend bus service later into the evening
- Focus on low-hanging fruit: single brand and consolidation of service
- Provide year round service on 267
- Look for efficiencies in existing models (discuss with Northstar)
- Extend service from Tahoma to Meeks Bay -- Homeowners association would be willing to contribute
- Make buses more skier friendly and promote lockers at ski areas for traveler convenience
- Plow or groom trail systems during the winter

#### Funding the Vision Plan

- Evaluate and identify all the next funding steps
- Work on overcoming Bi-County issues – need to work together and approach this as a regional effort
- Benchmark SB1 in Sacramento
- Review Active Transportation legislation
- Review Complete Streets legislation

## **Economic Analysis of the Vision Plan**

- Identify funding partners
- Develop a Scope of Work and RFP

## **Long Term Solutions**

- Evaluate funding mechanisms with a portfolio approach considering feasibility
- Evaluate Fares v. Free – possible have Ski Areas provide a ticket validation system and reimbursement
- Develop more Park & Ride lots
- Identify who we want to ride the bus
- Paid parking at ski areas would be an incentive to ridership
- Linear service now, need to look at providing services to neighborhoods
- Outreach to citizens to find out what they want
- CBA for analysis
- Make the case to the public – educate everyone
- Broaden perspective of stakeholders: State of CA, Reno – Las Vegas, Sacramento





**December 3, 2013**

**Subject: Performing Arts Center Strategic Discussion**

**From: Sandy Evans Hall / Ron Treabess**

**Staff will present materials summarizing the previous involvement of NLTRA with North Lake Tahoe Performing and Cultural Arts planning and support. The following attachments are provided for your information:**

- **Performing Arts Center—Key Points**
- **Brief Timeline of NLTRA Involvement**
- **Summary of 2009 Feasibility Study completed by Webb Management Group**
- **Updated Pro-forma Report—August 2013. Updates 2009 Study**
- **Vail Resorts Letter for the Performing Arts Center**

## Performing Arts Center

### Performing Arts Center – Key Points

- Timeline
- **1995 Tourism Development Master Plan:** (page 10, Visitor Facilities) “Missing Community Components : Studies for a community recreation center indicated that the following needs to be accommodated: 45,000 sf Performing Arts Center; Facilities for special events/performing arts center; Recreation complex and swimming pool, ice rink, first class golf course, venue for performing arts...”
- **2004 Tourism and Community Investment Master Plan:** (page 159) “Missing Recreational, Cultural and Artistic Components: **Performing Arts Center** – Performing arts are an important part of the visitor experience and community element. Well-organized non-profit organizations often take the lead in raising funds and building performing arts facilities. A center in Squaw Valley or Northstar would provide a good location for such programs.”
- **2011-16 Strategic Goals:** Performing Arts Center was mentioned but did not make the TOP FIVE list of infrastructure projects at the 2011 Board Retreat
- **Updated Pro-forma – August 2013** This updates the feasibility study that was done in 2009 by Webb Management Services. Key findings:
  - **Construction Economic Impact** - \$29.2 million in new sales, \$6 million in new earnings and 126 new person years of employment
  - **Annual Organizational Impacts** - \$654K in new sales, \$148K in new earnings and 4 new jobs (in addition to those in the new theater)
  - **Annual Audience Impacts** - \$1.8M in new sales, \$366K in new earnings and 12 new jobs
- **Assumptions in Impacts**
  - **Attendance** – 50% of paid 27,000 theater attendance is from out of county, 35% local, 15% recovered local (stayed in county rather than leaving)
  - **Performances** – Projecting 104 Theater performances and 23 Amphitheater performances for an average attendance of 213 people
  - **Lodging Revenue** – If 50% are from out of county, and average 2 to a room, staying one night, this would generate 6,750 additional room nights just for paid ticket holders. At an average \$250/night, this would generate \$168,750 in TOT per year
- **Budget Assumptions**
  - **Capacity of Seats Used** – Projections vary from 67% for Presenting Live Performances, 33% for Film Screenings, and 50% for Producing Live Performances
  - **Average Ticket Sale** – Ticket prices seem reasonable at \$40 for Presenting Live Performances, \$12 for Film Screenings, and \$25 for Producing Live Performances
  - **Annual Subsidy (funding) Requirement** - \$427K – slowly decreasing over time; Average Earned Income/Operating Expenses is 73%
- **Current Request for Funding**

- **Feasibility and Business Plan for Raising Capital to Develop Facility and pay for initial operations - \$153,900**
  - Business and Operational Plan – Webb Management \$38,900
  - Feasibility Study - Lester Group \$45,000
  - Elevation Renderings – Williams+Paddon \$30,000
  - Project Management – Pfocus Group \$25,000
  - Public Communications – Freshtracks Communication \$15,000
- County CEO is recommending BOS approve up to \$153,900 for this project upon approval by the NLTRA Board. \$83,900 was approved in November, remaining \$70,000 is still awaiting board approval
- **Board Discussion Points**
  - What is the priority of the Board for a Performing Arts Center?
  - If all of Phase One is funded and the capital campaign is deemed feasible is the Board willing to assist with funding Phase Two?
  - Is TOT a potential funding source for ongoing operational funding gap?
  - Are there other assumptions in the pro-forma that you believe to be questionable or would want further data from the applicant before being able to make a decision on the remaining Phase One funding?

## Brief Timeline of NLTRA Involvement of North Lake Tahoe Performing and Cultural Arts

### May, 1995

NLTRA North Lake Tahoe Tourist Development Plan

- Missing Community Components
- Performing Arts Center, Cultural Center, Arts Events

### June, 2004

NLTRA Tourism and Community Investment Master Plan

- Full-scale Performing Arts Theater Envisioned

### July, 2006

NLTRA approves \$150,000 to Support North Tahoe High School Theater Enhancements for performing arts

### December, 2006

Greater North Lake Tahoe Performing Arts Meeting

- 35 participants (5 NLTRA Board) representing people, organizations, companies working on or interested in community performing arts facility

### February, 2007

NLTRA Board requests Lake Tahoe Music Festival presentation of region-wide user survey results for performing arts facilities and programs

### April, 2007

NLTRA approves \$125,000 to purchase portable performance stage for North Lake Tahoe

### September, 2007

Art & Cultural Council of Truckee Tahoe (ACCTT) hold region-wide workshop to Address vision for performing arts & Community Arts Cultural Program

### October, 2007

ACCTT, Incline Vision Arts Cultural & Heritage Committee, NLTRA, Placer County Arts, approve initiating Feasibility Study of Performing Art Center(s) in Tahoe Truckee region

### October, 2007

NLTRA approves \$5,000 to prepare Request for Proposals to do feasibility study

### May, 2008

Regional Advisory group select Webb Management Group to do study from nine applicants. \$120,000 funding by seven regional entities (\$60,000 TOT)

### June, 2008

Reception and Workshop w/ Consultant

- 62 participants (NLTRA Board) from all Performing and Cultural Arts Interests

### August, 2008

Preliminary Findings Report Presented to NLTRA Board at public meeting

### December, 2008

Final Report "Feasibility Study & Business Planning for New Cultural Facilities—North Lake Tahoe/Truckee"

- Recommends Northstar for Performing Arts Hall and Amphitheater

**March, 2009**

Workshop/Moving forward on Feasibility Study Recommendations

**April, 2009**

Report to NLTRA Board as to future NLTRA involvement in implementation of "Feasibility Study & Business Planning for New Cultural Facilities"

**February, 2010**

Board approved Infrastructure/Transportation Highest Priorities Schedule including:

- Further Development of North Lake Tahoe Performing Arts Center & Related Programs and Facilities Throughout Area

**June, 2010**

Report to NLTRA Board that Tahoe Mountain Resorts Foundation has taken lead with Booth Creek to initiate planning for Northstar Performing Arts Facility.

- Working with land owner, CNL, for written commitment to use site.
- TOT funding request for advanced planning will be coming

**November, 2010**

Board Report: Northstar Performing Arts Center is on hold pending sale of Booth Creek to Vail Resorts and relationship to land owner CNL.

**2011-12**

Vail Resorts getting feet on ground as to overall operation of Northstar California

**October, 2012**

Tahoe Regional Arts Foundation (TRAF) rekindles Northstar proposal after researching properties previously considered

**Spring, 2013**

TRAF files for non-profit status and assimilates consulting team from submitted proposals to prepare business plan and feasibility study (including concept sketches) ~~access~~ <sup>assess</sup> merits of successful capital campaign.

**Summer, 2013**

- Prepare application for TOT funding request
- Work with Vail Resorts and land owners to get acceptance of site location

**August, 2013**

- Receive Webb Management Group review and update to 2009 Feasibility Study

**October, 2013**

TRAF presents Northstar Performing Arts Center stage one funding request to NLTRA

**November, 2013**

TRAF receives Letter of Continued Interest from Vail Resorts.

## report

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to: Keith D. Vogt, North Tahoe Arts Foundation  
from: Duncan Webb, Webb Management Services  
regarding: The Theater at Northstar  
date: August 12, 2013

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Webb Management Services, Inc. is a management consulting practice for the development and operation of performing arts facilities. We work for government, schools, developers and arts organizations on facility feasibility, business planning and strategic planning. The practice was founded in 1997 and we just started our 315<sup>th</sup> assignment. We last worked in the area in 2008, completing a cultural facilities master plan for the North Lake Tahoe region.

We are now asked to project the operating performance and then the economic impacts of the Theater at Northstar project in order to inform project leadership on the potential impacts and benefits of that specific project, and to support their fundraising efforts.

### **2. Pro-forma Operating Budget Update**

A pro-forma operating budget is a complex model that projects operating revenues and expenses in anticipation of a significant project or business decision. Rather than update the pro-forma that was created in 2008 for a possible new mid-size theater in the area, we have developed a new model based on the more specific features and goals of the proposed Theater at Northstar, also showing how the budget develops from the year before opening (2016) to the fourth year of operation (2020).

The pro-forma is based on estimated inputs, particularly activity levels, cost per square foot occupancy expenses, average rental rates and the conceptual spatial program. The model has been designed to be flexible and can be adjusted as new details come to light. The full pro-forma, which includes activity estimates, a multi-year budget, and proposed rental rates, is appended to this report.

The first part of the budget is our estimate of activity in all programmable spaces proposed for the new Theater, specifically the 500-seat theater, 2,500-person capacity amphitheater, smaller multi-purpose room, three classrooms and four work areas to be rented out to individual artists. Rental rates are set for nonprofit and commercial renters for each of those spaces. Base rental rates increase annually using an annual 3% rate of escalation.

The number of events or performances, prep days and event days is set for each space. For each performance venue, an average capacity sold multiplied by the number of performances yields an estimate of paid or attendance for each space.

Total rent paid is calculated for each space and these numbers make up rental income projections in the multi-year budget section. Here is a summary of activity over those first five years.

Activity Summary	2016	2017	2018	2019	2020
Theater Performances	104	104	116	120	132
Theater Use Days	174	175	197	203	225
Amphitheater Performances	23	22	24	25	25
Amphitheater Use Days	33	32	36	37	37
Total Paid Attendance	55,950	52,520	58,590	61,260	65,665

The next section of the pro-forma is the actual budget, starting with earned income and then subtracting operating expenses in order to identify annual funding requirements.

Earned income includes presenting fees, box office revenue from presenting, rental fees, user fees, food service income and box office income. Presenting, producing and rental income comes directly from the activity portion of the spreadsheet. User fees are additional charges to facility renters projected as a percentage of rental income. Food service income is based on net per capita income for concessions and an additional net for each catered event. Box office income includes both ticketing fees and a facility surcharge, an unfortunate but common practice in the sector.

Operating expenses include various personnel costs, programming costs, box office expenses, administration and then core building expenses.

Personnel expenses include base salaries for 9 full-time staff and then numerous part-time and event-based staff positions. Benefits are included in this expense and are set at 25% of base salary for full-time personnel and 10% of base salary for part-time personnel. Event-based staff expenses are independent contractors and vendors hired to assist renters and include technical labor, event staff and event cleaning.

Programming costs include both presenting fees (live and film) and the direct costs of mounting additional productions internally. Box office expenses are projected based on the number of tickets sold. Administration costs are support expenses that include professional services, office equipment, supplies, and systems, telephone costs and miscellaneous expenses. Notably, the pro-forma includes a small budget for institutional promotion/advertising and printing and publications.

Most occupancy costs are calculated on a cost per gross square foot and include utilities, repairs and maintenance, insurance, service contracts, janitorial services and cleaning supplies. The pro-forma

assumes a building size of 24,000 gross square feet, plus an additional 15,000 square feet of outdoor area (the amphitheater) to maintain. Here is a summary of projected revenues and expenses:

Budget Summary	2016	2017	2018	2019	2020
<b>Earned Income</b>					
Presenting	\$ -	\$ 184,560	\$ 168,364	\$ 176,449	\$ 201,674
Producing	\$ -	\$ 250,000	\$ 247,200	\$ 324,901	\$ 341,477
Rental Income	\$ -	\$ 277,575	\$ 295,188	\$ 337,716	\$ 358,203
User Fees	\$ -	\$ 152,863	\$ 162,333	\$ 189,036	\$ 200,086
Food Service	\$ -	\$ 71,950	\$ 72,121	\$ 82,315	\$ 89,341
Box Office	\$ -	\$ 138,476	\$ 131,523	\$ 148,489	\$ 157,157
	\$ -	\$ 1,075,424	\$ 1,076,728	\$ 1,258,907	\$ 1,347,938
<b>Operating Expenses</b>					
Full-time Personnel	\$ 105,625	\$ 328,750	\$ 345,188	\$ 362,447	\$ 380,569
Part-time Personnel	\$ 22,000	\$ 258,500	\$ 268,840	\$ 279,594	\$ 290,777
Event Staff	\$ -	\$ 135,000	\$ 141,750	\$ 148,838	\$ 156,279
Programming Costs	\$ -	\$ 454,132	\$ 451,858	\$ 540,167	\$ 572,733
Box Office	\$ -	\$ 81,361	\$ 78,550	\$ 90,853	\$ 97,924
Administration	\$ 13,438	\$ 53,750	\$ 55,900	\$ 58,136	\$ 60,461
Occupancy Costs	\$ -	\$ 185,000	\$ 190,975	\$ 197,146	\$ 203,520
	\$ 141,063	\$ 1,496,493	\$ 1,533,060	\$ 1,677,180	\$ 1,762,265
<b>Annual Funding Requirement</b>	\$ 141,063	\$ 421,069	\$ 456,332	\$ 418,273	\$ 414,327
<b>Earned Income/Op. Expense</b>	0%	72%	70%	75%	76%

Overall, the pro-forma suggests an operation that covers a large portion of operating expenses with earned revenue, with the annual funding requirement declining over time.

## 2. Economic Impact Update

Economic impact means that something has happened to increase economic activity, which includes new sales, new earnings for workers and new jobs in the local economy. These impacts are caused by various inputs, namely capital and operating expenditures. The key is that when a dollar is spent locally, some portion of it stays in the local economy to be spent again and again, until all of it "leaks" out of the local economy.

We calculate the total impacts of expenditures by applying multipliers to the industry sectors in which the money is spent – whether that be on couriers, computer service, or construction. And we get these multipliers from the Bureau of Economic Analysis, part of the Department of Commerce in



Washington DC, which has calculated how money spent in every County in every industry leads to new activity, earnings and jobs. We have purchased the multipliers for Placer County and have them attached to this report. Specifically, we are using RIMS Type II multipliers to project final demand based on 2010 census data.

**Construction Impacts**

The first impacts relate to the construction of the Theater. Here, the estimated construction budget of \$18 million leads to \$29.2 million in new sales, \$6.0 million in new earnings and 126 new person years of employment in the County.

One-time Impacts of Construction on Placer County, CA		
Input	Construction Budget	\$ 18,000,000
Outputs	Final Demand Multipliers (Industry 230000)	Project Outputs
Sales	1.6247	\$ 29,244,600
Earnings	0.3318	\$ 5,972,400
Employment (person-years of employment)	7.0038	126

**Annual Organizational Impacts**

The second set of impacts are those related to the operation and expenditures of the organization running the performing arts center. Each year, this organization spends significant amounts on goods and services, much of which is spent locally. And these expenditures are then subject to the multiplier effects for each of the non-personnel spending categories.

We calculate the ongoing impact of the facility using what is called the bill of goods approach, shown in the following chart. We estimate expenditures on everything from utilities and hotels to waste management and advertising. This is taken from the pro-forma operating budget for the PAC based on the first year of operations. The second step is to discount these expenditures in order that we are only counting new expenditures that are made inside the County. Then we can use our three types of multipliers to calculate new output, earnings and jobs in associated with new County spending in each of those industries.

### Operating Impacts on Placer County, CA

Category	Inputs			Output (dollars)	Multipliers		Outputs		
	Current Non-personnel expenditures	Expenditures in Placer County	Local Expenditures		Earnings (dollars)	Empl't (jobs)	New Sales (\$000's)	New Earnings (\$000's)	New Empl't (jobs)
Power Generation and Supply	\$ 80,000	50%	\$ 40,000	1.3654	0.2345	3.1330	\$ 54,616	\$ 9,380	0.1
Water, Sewage and other System	\$ 5,000	100%	\$ 5,000	1.6102	0.3251	5.8610	\$ 8,051	\$ 1,626	0.0
Retail Trade	\$ 25,000	75%	\$ 18,750	1.5188	0.3102	10.2893	\$ 28,478	\$ 5,816	0.2
Transit & Passenger Transportation	\$ 5,000	50%	\$ 2,500	1.5991	0.2748	7.6323	\$ 3,998	\$ 687	0.0
Telecommunications	\$ 1,500	50%	\$ 750	1.6248	0.2443	4.3850	\$ 1,219	\$ 183	0.0
Insurance Agencies/Brokerage	\$ 15,000	50%	\$ 7,500	1.8015	0.3700	7.8450	\$ 13,511	\$ 2,775	0.1
Equipment Rental	\$ 40,000	50%	\$ 20,000	1.6731	0.3178	5.1375	\$ 33,462	\$ 6,356	0.1
Legal Services	\$ 15,000	75%	\$ 11,250	1.6506	0.5212	7.0779	\$ 18,569	\$ 5,864	0.1
Accounting & Bookkeeping Services	\$ 10,000	50%	\$ 5,000	1.5938	0.4507	10.0217	\$ 7,969	\$ 2,254	0.1
Computer related services	\$ 15,000	75%	\$ 11,250	1.5549	0.3974	6.4913	\$ 17,493	\$ 4,471	0.1
Advertising & related services	\$ 50,000	50%	\$ 25,000	1.6284	0.4590	8.1198	\$ 40,710	\$ 11,475	0.2
Professional & Technical Services	\$ 25,000	100%	\$ 25,000	1.6636	0.5517	9.9337	\$ 41,590	\$ 13,793	0.2
Office administrative services	\$ 25,000	50%	\$ 12,500	1.6454	0.3892	7.7382	\$ 20,568	\$ 4,865	0.1
Business support services	\$ 25,000	50%	\$ 12,500	1.5604	0.3022	9.3015	\$ 19,505	\$ 3,778	0.1
Services to building	\$ 50,000	50%	\$ 25,000	1.5701	0.3049	12.6877	\$ 39,253	\$ 7,623	0.3
Waste management	\$ 5,000	100%	\$ 5,000	1.6657	0.3835	7.4955	\$ 8,329	\$ 1,918	0.0
Other Educational Services	\$ 50,000	75%	\$ 37,500	1.6045	0.3034	11.6720	\$ 60,169	\$ 11,378	0.4
Performing arts companies	\$ 250,000	25%	\$ 62,500	1.6653	0.4430	18.6513	\$ 104,081	\$ 27,688	1.2
Promoters of performing arts	\$ 75,000	50%	\$ 37,500	1.7371	0.3766	14.1394	\$ 65,141	\$ 14,123	0.5
Hotels & motels	\$ 20,000	100%	\$ 20,000	1.4898	0.2755	8.0273	\$ 29,796	\$ 5,510	0.2
Food services	\$ 25,000	100%	\$ 25,000	1.4893	0.2506	10.5401	\$ 37,233	\$ 6,265	0.3
Postal Service	\$ 15,000	100%	\$ 15,000	1.4982	0.4359	8.0449	\$ 22,473	\$ 6,539	0.1
<b>Averages and Totals</b>	<b>\$ 811,500</b>		<b>\$ 409,500</b>	<b>1.6053</b>	<b>0.3565</b>	<b>8.8657</b>	<b>\$ 653,738</b>	<b>\$ 147,823</b>	<b>4.3</b>

The chart shows that \$410K in new local spending in the County drives \$654K in new sales, \$148K in new earnings and 4 new jobs (in addition to those in the new theater).

### Annual Audience Impacts

The second component of operating impacts is the ancillary spending of facility audiences. To calculate these numbers, we start with the projected attendance at events in the first year and then remove the component that is simply shifting expenditures within the County. We are then left with two groups – those coming from outside the County, and then those from within the County who would otherwise be attending events elsewhere (e.g. San Francisco or New York).

### The Stage Audiences

Total Paid Theater Attendance (Opening Year)		27,000
Placer County Attenders	35%	9,450
Recovered County Attenders	15%	4,050
Non-County Attenders	50%	13,500

The next chart then shows how and how much audiences spend in conjunction with attendance at performances. This is national data provided by Americans for the Arts. So, for those coming from

within the County (our re-captured audience that otherwise would have gone outside the County), there is a certain amount spent on eating, shopping, traveling and so on. Then we apply our Placer County multipliers for each of these categories. For both groups of audiences, local expenditures drive new sales, earnings and jobs. Again, these are jobs created outside the building as a result of audience spending.

Ancillary Spending Impacts of The Stage at Northstar Audiences on Placer County, CA								
Ancillary Spending Impacts	Per Capita Expenditure Estimate	Total Direct (Induced) Expenditures	Output Multiplier	Total New Outputs (Sales)	Earnings Multiplier	Total New Earnings	Job Creation Multiplier	Total New Jobs
<b>1. Recovered County Attenders</b>								
Food Services	\$ 8.15	\$ 33,008	1.4893	\$ 49,158	0.2506	\$ 8,272	10.5401	0.3
Retail Trade	\$ 2.80	\$ 11,340	1.5188	\$ 17,223	0.3102	\$ 3,518	10.2893	0.1
Transportation	\$ 4.27	\$ 17,294	1.5991	\$ 27,654	0.2748	\$ 4,752	7.6323	0.1
Overnight Lodging	\$ 0.96	\$ 3,888	1.4898	\$ 5,792	0.2755	\$ 1,071	8.0273	0.0
Miscellaneous	\$ 0.60	\$ 2,430	1.6053	\$ 3,901	0.3565	\$ 866	8.8657	0.0
Sub-total		\$ 67,959		\$ 103,729		\$ 18,479		0.6
<b>2. Non-County Attenders</b>								
Food Services	\$ 15.28	\$ 206,280	1.4893	\$ 307,213	0.2506	\$ 51,694	10.5401	2.2
Retail Trade	\$ 8.70	\$ 117,450	1.5188	\$ 178,383	0.3102	\$ 36,433	10.2893	1.2
Transportation	\$ 5.82	\$ 78,570	1.5991	\$ 125,641	0.2748	\$ 21,591	7.6323	0.6
Overnight Lodging	\$ 19.97	\$ 269,595	1.4898	\$ 401,643	0.2755	\$ 74,273	8.0273	2.2
Miscellaneous	\$ 3.29	\$ 44,415	1.6053	\$ 71,300	0.3565	\$ 15,832	8.8657	0.4
Sub-total		\$ 716,310		\$ 1,084,180		\$ 199,823		6.5
<b>Total Impact of Ancillary Spending</b>	<b>Total (1+2)</b>	<b>\$ 784,269</b>		<b>\$ 1,187,909</b>		<b>\$ 218,302</b>		<b>7.2</b>

### Summary

Here finally is a chart that summarizes both the construction and operating impacts:

Summary of Economic Impacts		
<b>Ongoing Annual Impacts</b>	Input (Local Expenditures)	\$409,500
<b>Operations</b>	Output (Sales)	\$653,738
	Earnings	147,823
	Jobs Created (annual)	4
<b>Audience Spending</b>	Input (Base Year Customer)	\$784,269
	Output (Sales)	\$1,187,909
	Earnings	\$218,302
	Jobs Created (annual)	7
<b>Total Annual Operating Impacts</b>	Output (Sales)	\$1,841,647
	Earnings	\$366,125
	Jobs Created (annual)	12
<b>Construction Impacts</b>	Input (Local Expenditures)	\$18,000,000
	Output (Sales)	\$29,244,600
	Earnings	5,972,400
	Jobs Created (person-year)	126



The one-time impacts of this construction project are significant, But even more important are the ongoing impacts of the new operating organization spending money in the County, plus the impacts of new audiences spending more money, leading to \$1.8 million in new sales, \$366,000 in new earnings and 12 new jobs, annually.

**THE STAGE AT NORTHSTAR ACTIVITY AND OPERATING BUDGET FORECAST**

SPACES AND RATES		2016	% Change	2017	% Change	2018	% Change	2019	% Change	2020
Theater	Capacity	500								
	Rental/Period	Daily		\$773	3%	\$796	3%	\$820	3%	\$844
Amphitheater	Capacity	2,500		\$1,545	3%	\$1,591	3%	\$1,639	3%	\$1,688
	Rental/Period	Daily		\$3,863	3%	\$3,978	3%	\$4,098	3%	\$4,221
Multipurpose Room	Capacity			\$7,725	3%	\$7,957	3%	\$8,195	3%	\$8,441
	Rental/Period	Four-hours		\$129	3%	\$133	3%	\$137	3%	\$141
Classrooms (3)	Capacity			\$258	3%	\$265	3%	\$273	3%	\$281
	Rental/Period	Four-hours		\$52	3%	\$53	3%	\$55	3%	\$56
Artist Work Spaces (4)	Capacity			\$103	3%	\$106	3%	\$109	3%	\$113
	Rental/Period	Monthly		\$515	3%	\$530	3%	\$546	3%	\$563
<b>ACTIVITY BY SPACE</b>										
<b>THEATER</b>	Presenting									
	Live Performances	12		11		11		12		12
	Event Days	11		10		10		11		11
	Prep Days	3		2		2		3		3
	Total Use Days	14		12		12		14		14
	Average Capacity Sold	67%		85%		66%		67%		68%
	Attendance	4,020		3,575		3,630		4,020		4,080
	Average Ticket Price	\$40.00	3%	\$41.20	3%	\$42.44	3%	\$43.71	3%	\$45.02
	Total Box Office	\$180,800		\$147,290		\$154,043		\$175,711		\$183,863
	Ave. Artist Fees/Performance	\$7,500	3%	\$7,725	3%	\$7,978	3%	\$8,195	3%	\$8,441
	Ave Marketing Cost/Performance	\$3,750	3%	\$3,863	3%	\$3,978	3%	\$4,098	3%	\$4,221
	Ave Other Direct Cost/Performance	\$1,875	3%	\$1,931	3%	\$1,989	3%	\$2,049	3%	\$2,110
	Total Direct Costs	\$157,500		\$148,706		\$153,167		\$172,105		\$177,268
	Net from Live Presenting	\$3,300		\$(1,416)		\$875		\$3,606		\$6,415
	Film Screenings	12		11		11		12		12
	Use Days	12		11		11		12		12
	Average Capacity Sold	33%		31%		32%		33%		34%
	Attendance	1,980		1,705		1,760		1,980		2,040
	Average Ticket Price	\$12.00	3%	\$12.36	3%	\$12.73	3%	\$13.11	3%	\$13.51
	Film Box Office	\$23,760		\$21,074		\$22,406		\$25,963		\$27,552
	Distributor Fee	\$9,504	40%	\$8,430		\$8,962		\$10,385		\$11,021
	Marketing Costs	\$4,752		\$4,215		\$4,481		\$5,193		\$5,510
	Other Direct Costs	\$2,376		\$2,107		\$2,241		\$2,596		\$2,755
	Total Direct Costs	\$16,632		\$14,752		\$15,684		\$18,174		\$19,287
	Net from Film	\$7,128		\$6,322		\$6,722		\$7,799		\$8,286
<b>Producing</b>										
	Live Performances	40		40		50		50		60
	Event Days	36		36		45		45		54
	Prep Days	36		36		45		45		54
	Total Use Days	72		72		90		90		108
	Average Capacity Sold	50%		48%		49%		50%		51%
	Attendance	10,000		9,600		12,250		12,500		15,300
	Average Ticket Price	\$25.00	3%	\$25.75	3%	\$26.52	3%	\$27.32	3%	\$28.14
	Total Box Office	\$250,000		\$247,200		\$324,901		\$341,477		\$430,507
	Ave Production Cost/Performance	\$5,000	3%	\$5,150	3%	\$5,305	3%	\$5,464	3%	\$5,628
	Ave Marketing Cost/Performance	\$1,500	3%	\$1,545	3%	\$1,591	3%	\$1,639	3%	\$1,688
	Ave Other Direct Cost/Performance	\$500	3%	\$515	3%	\$530	3%	\$546	3%	\$563
	Total Direct Costs	\$280,000		\$288,400		\$371,315		\$382,454		\$472,714
	Net from Producing	\$(30,000)		\$(41,200)		\$(46,414)		\$(40,977)		\$(42,207)
<b>Rentals</b>										
<b>Nonprofits</b>										
	Performances	25		26		27		28		29
	Ave. Cap sold	67%		64%		65%		62%		63%
	Attendance	8,375		8,320		8,775		8,680		9,135
	Event Days	24		25		26		27		28
	Prep Days	24		25		26		27		28
	Total Use Days	48		49		51		53		55
	Total Rent Paid	\$35,625		\$38,162		\$40,818		\$43,800		\$46,512

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THE STAGE AT NORTHSTAR ACTIVITY AND OPERATING BUDGET FORECAST

	2016	% Change	2017	% Change	2018	% Change	2019	% Change	2020
<b>Commercial</b>									
Performances	15		16	6%	17	6%	18	6%	19
Ave. Cap sold	67%		64%		65%		62%		63%
Attendance	5,025		5,120	2%	5,525	8%	5,580	1%	5,985
Event Days	14		15	7%	16	7%	17	6%	18
Prep Days	14		15	7%	16	7%	17	6%	18
Total Use Days	29		30	3%	32	7%	34	6%	36
Total Rent Paid	\$42,750		\$46,988	10%	\$51,401	9%	\$56,057	9%	\$60,946
<b>All Uses &amp; Users</b>									
Performances	104		104	0%	118	13%	120	2%	132
Attendance	29,400		28,320	-4%	31,840	12%	32,760	3%	36,540
Use Days	174		175	1%	197	13%	203	3%	225
Rent Collected	\$78,375		\$85,130	9%	\$92,219	8%	\$99,657	8%	\$107,458
<b>AMPHITHEATER</b>									
<b>Presenting</b>									
Live Performances	15		14	-7%	14	0%	15	7%	15
Event Days	14		13	-7%	13	0%	14	8%	14
Prep Days	3		3	0%	3	0%	3	0%	3
Total Use Days	17		16	-6%	16	0%	17	6%	17
Average Capacity Sold	50%		48%	-4%	49%	2%	50%	2%	51%
Attendance	18,750		16,800	-11%	17,150	2%	18,750	9%	19,125
Average Ticket Price	\$35.00		\$36.05	3%	\$37.13	3%	\$38.25	3%	\$39.39
Total Box Office	\$656,250		\$605,640	-8%	\$636,805	5%	\$717,102	13%	\$753,387
Ave. Artist Fees/Performance	\$15,000		\$15,450	3%	\$15,914	3%	\$16,391	3%	\$16,883
Ave. Marketing Cost/Performance	\$7,500		\$7,725	3%	\$7,957	3%	\$8,195	3%	\$8,441
Ave. Other Direct Cost/Performance	\$3,750		\$3,863	3%	\$3,978	3%	\$4,098	3%	\$4,221
Total Direct Costs	\$393,750		\$378,525	-4%	\$389,881	3%	\$430,261	13%	\$443,169
Net from Live Presenting	\$262,500		\$227,115	-13%	\$246,924	8%	\$286,841	16%	\$310,218
<b>Rentals</b>									
<b>Nonprofits</b>									
Performances	4		4	0%	5	25%	5	0%	5
Ave. Cap sold	33%		31%	-6%	32%	3%	33%	3%	34%
Attendance	3,300		3,100	-6%	4,000	29%	4,125	3%	4,250
Event Days	4		4	0%	5	25%	5	0%	5
Prep Days	4		4	0%	5	25%	5	0%	5
Total Use Days	8		8	0%	10	25%	10	0%	10
Total Rent Paid	\$30,000		\$30,900	3%	\$39,784	29%	\$40,977	3%	\$42,207
<b>Commercial</b>									
Performances	4		4	0%	5	25%	5	0%	5
Ave. Cap sold	45%		43%	-5%	44%	2%	45%	2%	46%
Attendance	4,500		4,300	-5%	5,500	27%	5,625	2%	5,750
Event Days	4		4	0%	5	25%	5	0%	5
Prep Days	4		4	0%	5	25%	5	0%	5
Total Use Days	8		8	0%	10	25%	10	0%	10
Total Rent Paid	\$60,000		\$61,800	3%	\$79,568	30%	\$81,955	3%	\$84,413
<b>All Uses &amp; Users</b>									
Performances	23		22	-4%	24	5%	25	4%	25
Attendance	26,550		24,200	-9%	26,650	10%	26,500	-1%	29,125
Use Days	33		32	-3%	36	12%	37	3%	37
Rent Collected	\$90,000		\$92,700	3%	\$119,351	30%	\$122,932	3%	\$126,620
<b>Nonprofits</b>									
Total 4-hour blocks	200		210	5%	221	5%	232	5%	243
Total Use Days	67		70	4%	74	6%	77	4%	81
Total Rent Paid	\$25,000		\$27,038	8%	\$29,241	8%	\$31,624	8%	\$34,202
<b>Commercial</b>									
Total 4-hour blocks	100		105	5%	110	5%	116	5%	122
Total Use Days	33		35	6%	37	6%	39	6%	41
Total Rent Paid	\$25,000		\$27,038	8%	\$29,241	8%	\$31,624	8%	\$34,202
<b>All Users</b>									
Use Days	100		105	5%	110	5%	116	5%	122
Rent Paid	\$50,000		\$54,075	8%	\$58,482	8%	\$63,248	8%	\$68,403

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THE STAGE AT NORTHSTAR ACTIVITY AND OPERATING BUDGET FORECAST									
Classrooms (3)	2016	% Change	2017	% Change	2018	% Change	2019	% Change	2020
Nonprofits	400		420		441		463		486
Total 4-hour blocks	133		140		147		154		162
Total Use Days	\$20,000		\$21,630		\$23,393		\$25,299		\$27,361
Total Rent Paid									
Commercial	200		210		221		232		243
Total 4-hour blocks	67		70		74		77		81
Total Use Days	\$20,000		\$21,630		\$23,393		\$25,299		\$27,361
Total Rent Paid									
All Users	200		210		221		232		243
Total Use Days	\$40,000		\$43,260		\$46,786		\$50,599		\$54,723
Total Rent Paid									
Nonprofits	38		39		40		40		40
Months of Rental	\$19,200		\$20,023		\$20,879		\$21,767		\$22,690
Total Rent Paid									
2015 (pre-opening year)									
EARNED INCOME	2016		2017		2018		2019		2020
Presenting	160,800		147,290		154,043		175,711		183,683
Film Screenings	23,760		21,074		22,406		25,963		27,552
Ticket Sales	\$250,000		\$247,200		\$324,901		\$341,477		\$430,507
Rental Income	78,375		85,130		92,219		99,657		107,458
Theater	90,000		92,700		119,351		122,932		126,620
Amphitheater	50,000		54,075		58,482		63,248		68,403
Multipurpose Room	40,000		43,260		46,786		50,599		54,723
Classrooms	19,200		20,023		20,879		21,767		22,690
Artist Spaces	65,513		69,571		81,016		85,751		90,744
Technical Labor	43,675		46,381		54,010		57,167		60,496
Equipment Rental	21,838		23,190		27,005		28,584		30,248
Event Staff	21,838		23,190		27,005		28,584		30,248
Event Cleaning	55,950		54,086		62,158		66,940		73,907
Event Concessions (net)	16,000		18,025		20,157		22,401		24,761
Income from Catered Events (net)	54,551		52,743		60,604		65,267		72,059
Facility Surcharge	83,925		78,780		87,885		91,890		98,498
Ticketing Fees									
Total Earned Income	1,075,424		1,076,728		1,258,907		1,347,938		1,502,597
OPERATING EXPENSES									
Full-time Personnel	37,500	100%	78,750	5%	82,688	5%	86,822	5%	91,163
Executive Director	12,500	300%	52,500	5%	55,125	5%	57,881	5%	60,775
Director of Programs	12,500	300%	52,500	5%	55,125	5%	57,881	5%	60,775
Administrative Assistant	10,000	300%	42,000	5%	46,305	5%	48,620	5%	51,344
Building Manager	12,000	300%	50,400	5%	52,920	5%	55,566	5%	58,344
Salary Sub-Total	84,500		276,150		289,958		304,455		319,678
Benefits	21,125		69,038		72,489		76,114		79,920
Sub-total	105,625		345,188		362,447		380,569		399,598
Part-time Personnel	20,000	100%	41,600	4%	43,264	4%	44,895	4%	46,794
Artistic Director	35,000	4%	36,400	4%	37,856	4%	39,370	4%	40,945
Marketing Manager	20,000	4%	20,800	4%	21,632	4%	22,497	4%	23,397
F&B Manager	25,000	4%	26,000	4%	27,040	4%	28,122	4%	29,246
Volunteer Manager	20,000	4%	20,800	4%	21,632	4%	22,497	4%	23,397
Bookkeeper	20,000	4%	20,800	4%	21,632	4%	22,497	4%	23,397
IT Manager	35,000	4%	36,400	4%	37,856	4%	39,370	4%	40,945
Ticket Office Manager	25,000	4%	26,000	4%	27,040	4%	28,122	4%	29,246
Ticket Office Staff									

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THE STAGE AT NORTHSTAR ACTIVITY AND OPERATING BUDGET FORECAST

	2016	% Change	2017	% Change	2018	% Change	2019	% Change	2020
Sub-total	20,000		244,400		254,176		264,343		274,917
Benefits	2,000		24,440		25,418		26,434		27,492
Sub-total	22,000		268,840		279,594		290,777		302,408
Event-based Staff									
Technical Labor	60,000	5%	63,000	5%	66,150	5%	69,458	5%	72,930
Event Staff	50,000	5%	52,500	5%	55,125	5%	57,881	5%	60,775
Event Cleaning	25,000	5%	26,250	5%	27,563	5%	28,941	5%	30,388
Sub-total	135,000		141,750		148,838		156,279		164,093
Programming Costs									
Direct Costs of Live Presented Events	157,500		148,706		153,167		172,105		177,268
Direct Costs of Film Events	16,632		14,752		15,684		18,174		19,287
Direct Costs of Produced Events	280,000		288,400		371,315	5%	382,454	5%	472,714
Sub-total	454,132		451,858		540,167		572,733		669,268
Box Office									
Network Maintenance	13,988		13,524		15,540		16,735		18,477
Postage	11,190		10,819		12,432		13,388		14,781
Ticket Printing	560		541		622		669		739
Supplies	2,798		2,705		3,108		3,347		3,695
Ticketing Service (net)	41,963		40,572		46,619		50,205		55,430
Credit Card Fees	10,864		10,389		12,534		13,579		16,044
Sub-total	81,381		78,530		90,853		97,924		109,166
Administration									
Institutional Promotion/Advertising	5,000	4%	5,200	4%	5,408	4%	5,624	4%	5,849
Printing & Publications	5,000	4%	5,200	4%	5,408	4%	5,624	4%	5,849
Office Equipment/Systems	5,000	4%	5,200	4%	5,408	4%	5,624	4%	5,849
Office Supplies/Services	2,500	4%	2,600	4%	2,704	4%	2,812	4%	2,925
Legal/Accounting	25,000	4%	26,000	4%	27,040	4%	28,122	4%	29,246
Volunteer Management	1,250	4%	1,300	4%	1,352	4%	1,406	4%	1,462
Professional Development	2,500	4%	2,600	4%	2,704	4%	2,812	4%	2,925
IT	5,000	4%	5,200	4%	5,408	4%	5,624	4%	5,849
Telephone	1,250	4%	1,300	4%	1,352	4%	1,406	4%	1,462
Miscellaneous	1,250	4%	1,300	4%	1,352	4%	1,406	4%	1,462
Sub-total	53,750		55,900		58,136		60,461		62,880
Occupancy Costs									
Utilities	55,000		57,269		59,007		60,777		62,585
Repairs and Maintenance	30,000		31,827		33,782		35,785		37,835
Service Contracts	18,540		19,669		20,868		22,137		23,476
Building Supplies	12,000		12,360		12,731		13,113		13,506
Cleaning Supplies	6,000		6,180		6,365		6,553		6,753
Site Maintenance	22,500		23,175		23,870		24,586		25,324
Technology Services	12,500	4%	13,000	4%	13,520	4%	14,061	4%	14,623
Performance Equipment R&M	12,500	4%	13,000	4%	13,520	4%	14,061	4%	14,623
Trash Hauling	5,200	4%	5,408	4%	5,624	4%	5,849	4%	6,085
Security System	12,500	4%	13,000	4%	13,520	4%	14,061	4%	14,623
Sub-total	185,000		190,975		197,146		203,520		210,104
Total Operating Expenses	1,496,493		1,533,060		1,677,180		1,762,265		1,817,517
Annual Funding Requirement	421,069		456,332		418,273		414,327		414,920
Earned Income as % of Op Expenses	0%		72%		75%		76%		78%
RATIOS AND FORMULAS									
Escalation Rate	3%		3%		3%		3%		3%
User Fees as a % of Rent	30%		30%		30%		30%		30%
Event Staff	20%		20%		20%		20%		20%
Event Cleaning	10%		10%		10%		10%		10%
Food Service	10%		10%		10%		10%		10%
Total Event Attendance	55,950		52,520		58,590		61,260		65,665

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**THE STAGE AT NORTHSTAR ACTIVITY AND OPERATING BUDGET FORECAST**

	2016	% Change	2017	% Change	2018	% Change	2019	% Change	2020
Concession Net per Live Theater Attender	\$1.00	3%	\$1.03	3%	\$1.06	3%	\$1.09	3%	\$1.13
<b>Catered Events</b>									
Outdoor Catered Events	12		13		14		15		16
Fee/per Event	\$1,000	3%	1,030	3%	1,061	3%	1,093	3%	1,128
Multipurpose Room Catered Events	8		9		10		11		12
Fee/per Event	\$500	3%	\$515	3%	\$530	3%	\$546	3%	\$563
<b>Box Office Revenues</b>									
Ticketing Fees									
Online	\$1.50	3%	\$1.55	3%	\$1.59	3%	\$1.64	3%	\$1.69
Telephone	\$0.75	3%	\$0.77	3%	\$0.80	3%	\$0.82	3%	\$0.84
Walk-up	\$0.25	3%	\$0.26	3%	\$0.27	3%	\$0.27	3%	\$0.28
Tickets Sold	55,950		52,520		58,590		61,260		65,665
Online	50%		50%		50%		50%		50%
Telephone	20%		20%		20%		20%		20%
Walk-up	30%		30%		30%		30%		30%
Facility Fee Charge/Ticket Sold	\$1.50	150%	150%		150%		150%		150%
<b>Box Office Expenses</b>									
Total Tickets Sold	55,950		52,520		58,590		61,260		65,665
Cost/Ticket Sold	\$0.25	3%	\$0.26	3%	\$0.27	3%	\$0.27	3%	\$0.28
Network Maintenance	\$0.20	3%	\$0.21	3%	\$0.21	3%	\$0.22	3%	\$0.23
Postage	\$0.01	3%	\$0.01	3%	\$0.01	3%	\$0.01	3%	\$0.01
Ticket Printing	\$0.05	3%	\$0.05	3%	\$0.05	3%	\$0.05	3%	\$0.06
Supplies	\$0.75	3%	\$0.77	3%	\$0.80	3%	\$0.82	3%	\$0.84
Ticketing Service (net)	\$434,560	3%	415,564	3%	501,950	3%	543,151	3%	641,743
Total Box Office	\$434,560	3%	415,564	3%	501,950	3%	543,151	3%	641,743
Credit Card Fees									
Full-time	25%		25%		25%		25%		25%
Part-time	10%		10%		10%		10%		10%
<b>Occupancy Costs</b>									
Total Gross Square Footage	24,000		24,000		24,000		24,000		24,000
Direct Costs/Square Foot	\$2.25	3%	\$2.32	3%	\$2.39	3%	\$2.46	3%	\$2.53
Utilities	\$1.25	3%	\$1.29	3%	\$1.33	3%	\$1.37	3%	\$1.41
Repairs and Maintenance	\$0.75	3%	\$0.77	3%	\$0.80	3%	\$0.82	3%	\$0.84
Service Contracts	\$0.50	3%	\$0.52	3%	\$0.53	3%	\$0.55	3%	\$0.56
Building Supplies	\$0.25	3%	\$0.26	3%	\$0.27	3%	\$0.27	3%	\$0.28
Cleaning Supplies									

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**Feasibility Study and Business Planning  
for New Cultural Facilities**

**Truckee-North Lake Tahoe**

**January 2009**



This report summarizes the findings, conclusions and recommendations of Webb Management Services' Needs Assessment for the NLTRA. Areas of research and analysis include:

1. Audience demand
2. User demand
3. Existing and proposed facilities
4. Benefits and impacts

### **Audience & Market Analysis**

The first step in this process was to define a market for the region. Using anecdotal information from comparable communities, survey information from the Lake Tahoe Music Festival and experience defining market areas for cultural facilities in similar areas, we have defined the region into two key segments:

1. The North Lake Tahoe Region
2. The 30-mile radius surrounding Kings Beach

This analysis also examined the distinct differences between various communities in the region. Truckee has a larger proportion of families and has strong population growth. Sunnyside and Tahoe City have a high concentration of second homeowners, and population growth is relatively flat. Kings Beach has a significant Hispanic and Latino population as well as lower income levels. And in Nevada, Incline Village has an older and more affluent population.



Further, we have identified three distinct populations that represent potential arts attendees:

1. Permanent residents
2. Second homeowners
3. Visitors (i.e. tourists)

#### Competitive Landscape

To understand the existing supply of cultural facilities, we reviewed local and regional facilities where arts events and programming regularly occur. The results show:

- There are 22 local facilities currently used for public performance or presentation on a consistent basis, ranging in size from a 60-seat performance space at the KidZone

January 2009

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museum to the large-scale outdoor facilities located in parks, ski resorts and even a golf course.

- Half of the region's facilities are operated by schools, churches, or casinos, facilities that are generally in poor condition and have limited theatricality.
- A large proportion of performing arts events take place in untraditional venues such as bars, restaurants, conference rooms and backyards.
- Larger regional performance spaces in Reno and Carson City host more significant touring entertainment.



Based on the existing facility inventory and interviews, observations about the current competitive landscape are:

- Quality and quantity of local performance facilities limit program opportunities for artists, arts groups, schools, community organizations and permanent, seasonal and visiting audiences.
- The inventory of cultural facilities may be stifling the development of cultural groups and the sustainability of local artists. For example, a lack of affordable artist workspace seems to be inspiring working visual artists to leave the area.
- Most local performance spaces are in poor to fair condition and were not created to support quality live performances.
- Many facilities are affiliated with schools and churches, with booking policies that are risky for outside users.
- There is a large inventory of outdoor performance spaces supporting seasonal festivals and events.
- There are a large number of proposed facilities, many have flexible concepts and are willing to reevaluate based on the recommendations of this study.



### **Conclusions & Recommendations**

The North Lake Tahoe Region has a good propensity and capacity to support additional cultural activity. Existing venues limit the quality and quantity of cultural activity, stifling the establishment and growth of local arts organizations. There are a number of new facilities in development, and a clear need for quality performance venues in the region.

The following observations are of particular importance:

- New facilities and programs should first aim to serve the local permanent residents, then market to the seasonal and visiting populations.
- There is notable demand for facilities and programs on the part of regional residents and organizations.



2. Larger facilities to serve North Lake Tahoe as a whole.

a) One facility should support the North Lake Tahoe arts community, unifying regional arts groups and audiences. The facility should offer events and programming that are interactive and engaging. To accommodate this type of programming and ensure a sustainable operation, physical characteristics should include:

- 500-seat performance space with fly tower.
- 100-seat black box theater.
- Children's arts facilities.
- Rehearsal space suited for dance.
- Multi-media capabilities including film equipment.
- Administrative space for resident groups and short-term community access to administrative and meeting space for other arts groups and artists.
- Meeting space.
- Exhibition or gallery space.

b) A second facility should focus on providing audiences with year-round, nationally-respected performing arts events. This facility should focus high-end performers and talent, presenting world-class dance, music and theater. To appeal to national presenters and performers, this space should possess the following physical characteristics:

- 800-seat 'jewel-box' performance space.
- Orchestra pit.
- Fly tower.
- Quality acoustics.
- Proper backstage amenities.

- Large lobby with a high level gallery.
- High quality food service.
- Ability to convert (or partially convert) to flat floor for cabaret style events.



### 3. Appropriate and permanent outdoor facilities.

A large inventory of amphitheaters and outdoor performance spaces already exist in the region. But many of these spaces are untraditional, lacking fixed seating or stages, stage coverage and basic patron amenities. New facilities should possess some of these characteristics. Consideration should be given to the audience experience, creating a comfortable atmosphere for large audiences and highlighting the beauty of the region. Specific recommendations include:

### 5. A visual arts center.

Interviews with local artists indicate a strong need for adequate workspace as well as sufficient retail and exhibition space. A Visual Arts Center would establish a cultural, creative identity, connect local working artists, employee professional artists, reduce the trend of artists leaving the region and more. This facility should include:

- Space in which local artists can create and sell their work.
- Program space for artists to teach classes.
- Multi-purpose room for lectures, meetings and more.
- Nonprofit exhibition space.
- Food service for visitors and artists.





### Recommended Facilities

1. Outdoor Plaza Event Venue
2. Large Capacity Amphitheatre
3. High-Quality Amphitheatre with Distinct Setting
4. Visual Arts Center
5. State-of-the-Art Performing Arts Center (800-seats plus high-end gallery)
6. Regional Cultural Arts Center (500-seats, 100-seats plus add'l spaces)
7. Community Arts Facilities
  - Truckee
  - Tahoe City
  - Incline Village/Crystal Bay
  - Kings Beach



Feasibility Study and Business Planning for New Cultural Facilities  
Truckee-North Lake Tahoe

## 6. the regional performing arts hall and amphitheater

Finally, we here describe the Regional Performing Arts Hall and Amphitheater, based on the concept for new facilities proposed at Northstar. Appended are more detailed descriptions of a couple of similar projects.

What is unique about this concept is a plan for indoor and outdoor facilities that are animated more by touring programs and are targeted more to second home and visiting segments of the regional market. Let's assume the development of the following spaces:

Indoor area: 55,000 gross square feet

Components:

- A 600-seat flexible performance space with an enclosed stage and backstage areas. There is a fly-tower (for raising and lowering lighting and scenery), an orchestra shell (that allows a music ensemble to perform on the stage) and an orchestra pit (that allows live music for dance or theater productions).
- A large lobby that includes a concession area/coffee bar.
- Backstage support, including dressing rooms, green room and production offices.
- An outdoor performance area with a large covered stage, fixed seating of 1,000 and additional lawn seating of 1,500.

# VAIL RESORTS®

EXPERIENCE OF A LIFETIME

November 25, 2013

North Lake Tahoe Resort Association  
Attention: Ron Treabess  
P.O. Box 884  
Tahoe City, CA 96145  
Ron@GoTahoeNorth.com

County of Placer  
Attention: Jennifer Merchant  
5225 North Lake Blvd.  
Carnelian Bay, CA 96140  
jmerchan@placer.ca.gov

Tahoe Regional Arts Foundation, Inc.  
Attention: Keith Vogt, President  
12277 Soaring Way  
Suite #104  
Truckee, CA 96161

**Re: Tahoe Regional Arts Foundation**

Dear Ron and Jennifer:

As you are aware, the Tahoe Regional Arts Foundation has approached Northstar California regarding the possibility of constructing and operating a visual and performing arts center at the Castle Peak area of the resort, near the entrance from California state highway 267.

We are excited about the possibility of having the center at Northstar and will continue to have robust discussions with the Tahoe Regional Arts Foundation and the community to determine whether or not the proposed location is a desirable site for the project. Although we have not yet made any formal commitments to the project, we have been negotiating a Memorandum of Understanding with the Foundation and want to express our desire to see the proposed feasibility study completed.

Please do not hesitate to contact us if you have any questions or concerns.

Sincerely,



Bill Rock  
Senior Vice President & Chief Operating Officer  
Northstar California Resort

390 Interlocken Crescent  
Broomfield, CO 80021  
303-404-1800



## north lake tahoe

Chamber | CVB | Resort Association

December 3, 2013

**Subject:** North Lake Tahoe Water Shuttle Report and 2014 Funding Request

**From:** Ron Treabess, Director of Community Partnerships and Planning

### **Staff Recommendation:**

- The NLTRA Board approve and recommend to the Placer county Board of Supervisors Infrastructure funding of up to \$140,000 to support the Tahoe Transportation District continuing to provide the North Lake Tahoe Water Shuttle Program in 2014.

### **Background:**

- The Water Shuttle program has been operating the past two years as part of a three year pilot program.
- At the request of NLTRA and Placer County, the Tahoe Transportation District (TTD) has entered into three-year contract agreements with the shuttle operator, and with dock owners for landing purposes.
- The Truckee North Tahoe Transportation Management Association has managed the service for the TTD.
- The service has been permitted each year by TRPA as a recreational experience and as an alternate means of transportation.
- A season review and analysis Program Monitoring Report (PMR) for 2013 has been prepared by LSC Transportation Consultants (attached).
- Gordon Shaw (LSC) will be present to clarify, as may be necessary, findings in the report and the recommendations for continuing the shuttle program in 2014.
- Additional funding will be necessary as the ridership, while improving, has not met anticipated potential because of limited shuttle seating capacity, and because initial start-up fees required more subsidy during year one.

### **Decision Considerations:**

- TOT required funding for 2014 will be up to \$140,000, as compared to \$208,000 in year one, and \$157,000 during year two.
- Daily ridership was 48% higher in 2013 than in 2012 and normal transit expectations are for the 3<sup>rd</sup> year of operation to have additional passenger increases.
- Overall changes made from 2012 for 2013 greatly improved efficiency and desirability of the service and, the recommended adjustments for 2014 will have a similar result. (See PMR)
- The results of the first two years have shown that ridership will never fully eliminate subsidy as is true with almost all transit services.

- The estimated Revenue and Expenses for 2014 will approximate those of 2013. (Table 4 on Page 16 of PMR)
- In reviewing subsidy and total cost per passenger figures (page 16 of PMR), it must be remembered that capital costs are included as shuttle amortization costs will continue for the three-year contract. Capital costs are not normally included subsidy and total cost per passenger.
- After the initial three year contract, future year contracts will be subject to negotiation without consideration of shuttle amortization costs.
- It is important to continue the water shuttle program as it is a piece of the overall transportation vision for North Lake Tahoe that is slowly being brought to fruition.
- The program is also an important element in the proposed Lake Tahoe Passenger Ferry Project for which a joint notice of intent to prepare an environmental impact statement has been issued by the Federal Transit Administration, the TTD, and the TRPA.

**Capital Investment/Transportation Committee Recommendation:**

- The Committee unanimously passed a motion to recommend the NLTRA board approve up to \$140,000 to support the Tahoe Transportation District continuing to provide the North Lake Tahoe Water Shuttle Program in 2014.
- Other committee recommendations included:
  1. Determine expectations necessary to be met to continue beyond 2014.
  2. Committee review 2014 user surveys prior to conducting.
  3. Explore "next bus" type system for water shuttle program.
  4. Try to determine acceptable passenger fare thresholds.
  5. Update data from other areas shuttle systems.
  6. Investigate possible air quality mitigation funding for pilot transit.

**Tourism Master Plan/Strategic Goals:**

**By 2016, transportation systems within the North Lake Tahoe area will effectively link visitor destinations, recreation and lodging products with increased ridership on service and recreational routes of 20% (3% per year).**

**By 2016, the organization will have provided advocacy for all project and program development that aligned with our mission.**



## TRANSPORTATION PLANNING AND TRAFFIC ENGINEERING CONSULTANTS

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### TECHNICAL MEMORANDUM

DATE: November 19, 2013  
TO: Ron Treabess, North Lake Tahoe Resort Association  
FROM: Bill Suen & Gordon Shaw, LSC Transportation Consultants, Inc.  
RE: North Tahoe Water Shuttle 2013 Program Monitoring Report

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This memorandum presents a review of the North Tahoe Water Shuttle program operated in the summer of 2013. This memo is intended to report performance and ridership data, as well as materials to aide in decision making regarding operations and improvements for the 2014 season.

#### **Overview**

The North Tahoe Water Shuttle was managed by the Truckee – North Tahoe Transportation Management Association (TMA). Fineline Industries, Inc. provided the vessel and operated the service under a contract with the Tahoe Transportation District (TTD). The bulk of the funding for the program was provided by the North Lake Tahoe Resort Association (NLTRA).

The North Tahoe Water Shuttle provided service between Homewood, Tahoe City, Carnelian Bay, and Tahoe Vista, California. 2013 marked the second year of service, though the first full summer of service. In total, the North Tahoe Water Shuttle was scheduled to operate for 88 days from June 27th to September 22<sup>nd</sup>, 2013. Excluding six days on which service was not operated, service was actually provided on 82 days.

#### **Changes from the 2012 Season**

Based on feedback gather from the initial 2012 season, several changes were made to the North Tahoe Water Shuttle. The following are the chief changes made to the program.

##### *Fares/Ticketing*

The fare was modified for the 2013 season to eliminate the additional fare for passengers traveling between Homewood and Carnelian Bay or Tahoe Vista. The following rates listed below were charged in the 2012 season:

- North Shore Trip (Between Tahoe City, Carnelian Bay or Tahoe Vista) or West Shore Trip (Between Tahoe City and Homewood) – \$10 for general public, \$7 for children 10 and under.
- North Shore – West Shore Trip (between Carnelian Bay/Tahoe Vista and Homewood) – \$20 for general public, \$14 for children 10 and under.

For 2013, all one-way trips were \$10 for adults and \$7 for children under 10, regardless of trip origin and destination.

Another important change was that reservations were not mandatory, and passengers could pay the Captain (using a credit card) directly on the boat.

The reservation system was operated by Silver Voyages, rather than directly by TMA staff. Phones were staffed from 8:30 AM to 5:00 PM seven days a week.

#### *Hours of Operation*

In 2012 service was available from 8:00 AM to 8:00 PM. As ridership data indicated that less than 10 percent of riders used the shuttle service during the first run (between 8:00 AM and 10:00 AM), the start of daily shuttle operations was moved to 10:00 AM. During the evening hours in 2012, ridership dropped off after 4:30 PM. This was assumed to be due in part to the fact that the schedule did not allow a convenient period for dinner at many of the stops. In 2013, the shuttle ran until 11:37 PM through Labor Day and until 8:52 thereafter, in order to accommodate dining and evening entertainment.

#### *Days of Operation*

The 2013 North Tahoe Water Shuttle season from June 27<sup>th</sup> to September 22<sup>nd</sup> (88 days) was substantially longer than the 59 days operated in 2012, when the shuttle ran from August 3<sup>rd</sup> to September 30<sup>th</sup>.

#### *Dock Location*

The 2013 shuttle served the following docks:

- Tahoe Vista (Captain Jon's Restaurant)
- Tahoe Vista (North Tahoe Marina)
- Carnelian Bay (Garwood's Restaurant)
- Tahoe City (Tahoe City Marina)
- Homewood (West Shore Café)
- Homewood (Obexers Marina)

Obexers was added to the 2013 season, to ensure that service to Homewood would remain available on days when West Shore Café is closed for a private party. In addition, the North Lake Marina in Tahoe Vista was added as back up location for periods when wave heights preclude use of Captain Jon's. The Marina served as a drop off only location, when the lake was too rough to dock at Captain Jon's.

### *Public Information*

Signage at the dock locations was improved, to better guide passengers to the specific pier and to encourage walk-up ticket purchases. In addition, the fact that the decision to operate the program was made far in advance allowed greater marketing in visitor guides and other pieces with long lead times. Other marketing efforts were similar to the 2012 marketing program. This included distribution of rack cards (8,800 were distributed), print ads, radio ads, web ads, and direct visits with lodging properties at two times over the course of the season.

### **Ridership**

The North Lake Tahoe Water Shuttle boarded 2,498 riders over the summer months of operations. In 2012 a total of 1,223 riders boarded the shuttle. The ridership roughly doubled from 2012 to 2013 (a 105 percent increase).

This total number of one-way passenger trips is based on boardings recorded by the on board "Captains Logs". This figure is less than the total number of passengers recorded in the reservation manifest system (2,885), which also reflects reservations made but not actually used.

#### *Daily Ridership*

Table 1 and Figure 1 present total daily boardings on each day of service. Ridership ranged from a high of 69 passengers on Wednesday August 14 to a low of 4 on Friday September 6. In addition, there were six days when service was entirely not operated, due to high winds and unfavorable boating conditions. Average daily ridership (30.8 boardings) was 48 percent higher than the 20.7 average daily boardings in 2012. The average daily ridership was 19 in June, 35 in July, 38 in August, and 13 in September. Ridership by day of week ranged from a low of 20 on Mondays to a high of 40 on Saturdays, as also shown in Table 1. No wheelchair passengers used the North Tahoe Water Shuttle during the 2013 season.

#### *Ridership by Run and by Stop*

Table 2 shows boarding and alighting by run and by stop. The ridership by run is also shown in Figure 2. As indicated, the bulk of the ridership is carried between 11:00 AM and 8:00 PM (86 percent of total boardings). Ridership in the late evening was particularly low, with runs after 9:00 PM generating only 5 percent of total boardings (though these runs were operated 14 less days than earlier runs).

Tahoe City Marina is the hub of Water Shuttle activity with the greatest number of boardings and alightings (38 percent of the total). This is followed by the West Shore Cafe stop (21 percent), the Carnelian Bay stop (18 percent), the Tahoe Vista stop (14 percent), and the Obexer's stop (10 percent). The relative popularity of the Tahoe City stop reflects the many dining, commercial and visitor attractions in the area, though it is worth noting that as a whole the boardings at the two stops in Homewood ran a close second (31 percent). As shown in Figure 2, one particularly strong ridership pattern was passengers debarking in Homewood in the lunch hour, and then boarding for their return trip northward in the 3 PM hour.



**Table 1: Daily Water Shuttle Passenger and Bicycle Boardings**

Boardings (1-Way Trips)				Boardings (1-Way Trips)			
Date	Day of Week	Total Passengers	Bicycles	Date	Day of Week	Total Passengers	Bicycles
6/27/2013	Thursday	29	0	9/1/2013	Sunday	36	2
6/28/2013	Friday	15	3	9/2/2013	Monday	17	1
6/29/2013	Saturday	15	0	9/3/2013	Tuesday	16	0
6/30/2013	Sunday	16	0	9/4/2013	Wednesday	9	0
7/1/2013	Monday	11	0	9/5/2013	Thursday	No Service	0
7/2/2013	Tuesday	34	4	9/6/2013	Friday	4	2
7/3/2013	Wednesday	18	4	9/7/2013	Saturday	31	6
7/4/2013	Thursday	46	16	9/8/2013	Sunday	24	4
7/5/2013	Friday	48	7	9/9/2013	Monday	2	0
7/6/2013	Saturday	60	2	9/10/2013	Tuesday	26	9
7/7/2013	Sunday	49	1	9/11/2013	Wednesday	16	0
7/8/2013	Monday	13	0	9/12/2013	Thursday	7	0
7/9/2013	Tuesday	25	0	9/13/2013	Friday	6	0
7/10/2013	Wednesday	25	0	9/14/2013	Saturday	23	0
7/11/2013	Thursday	30	2	9/15/2013	Sunday	16	4
7/12/2013	Friday	51	11	9/16/2013	Monday	14	4
7/13/2013	Saturday	36	2	9/17/2013	Tuesday	No Service	0
7/14/2013	Sunday	17	0	9/18/2013	Wednesday	9	2
7/15/2013	Monday	29	0	9/19/2013	Thursday	14	2
7/16/2013	Tuesday	31	0	9/20/2013	Friday	No Service	0
7/17/2013	Wednesday	39	0	9/21/2013	Saturday	No Service	0
7/18/2013	Thursday	45	3	9/22/2013	Sunday	7	0
7/19/2013	Friday	51	5				
7/20/2013	Saturday	62	2	<b>Total</b>		<b>2498</b>	<b>223</b>
7/21/2013	Sunday	20	0				
7/22/2013	Monday	30	0				
7/23/2013	Tuesday	40	2				
7/24/2013	Wednesday	34	2				
7/25/2013	Thursday	13	2				
7/26/2013	Friday	22	0				
7/27/2013	Saturday	37	0				
7/28/2013	Sunday	36	2				
7/29/2013	Monday	58	29				
7/30/2013	Tuesday	30	2				
7/31/2013	Wednesday	34	0				
8/1/2013	Thursday	52	17				
8/2/2013	Friday	61	0				
8/3/2013	Saturday	59	7				
8/4/2013	Sunday	46	14				
8/5/2013	Monday	No Service	0				
8/6/2013	Tuesday	No Service	0				
8/7/2013	Wednesday	66	0				
8/8/2013	Thursday	32	10				
8/9/2013	Friday	34	3				
8/10/2013	Saturday	19	5				
8/11/2013	Sunday	62	3				
8/12/2013	Monday	19	0				
8/13/2013	Tuesday	31	2				
8/14/2013	Wednesday	69	1				
8/15/2013	Thursday	47	6				
8/16/2013	Friday	54	8				
8/17/2013	Saturday	63	3				
8/18/2013	Sunday	54	2				
8/19/2013	Monday	14	0				
8/20/2013	Tuesday	46	0				
8/21/2013	Wednesday	13	0				
8/22/2013	Thursday	20	0				
8/23/2013	Friday	36	0				
8/24/2013	Saturday	28	5				
8/25/2013	Sunday	No Service	0				
8/26/2013	Monday	16	0				
8/27/2013	Tuesday	17	0				
8/28/2013	Wednesday	16	0				
8/29/2013	Thursday	33	0				
8/30/2013	Friday	15	0				
8/31/2013	Saturday	50	0				

Average Daily by Day of Week		
Sunday	29	2
Monday	20	3
Tuesday	30	2
Wednesday	29	1
Thursday	31	5
Friday	33	3
Saturday	40	3

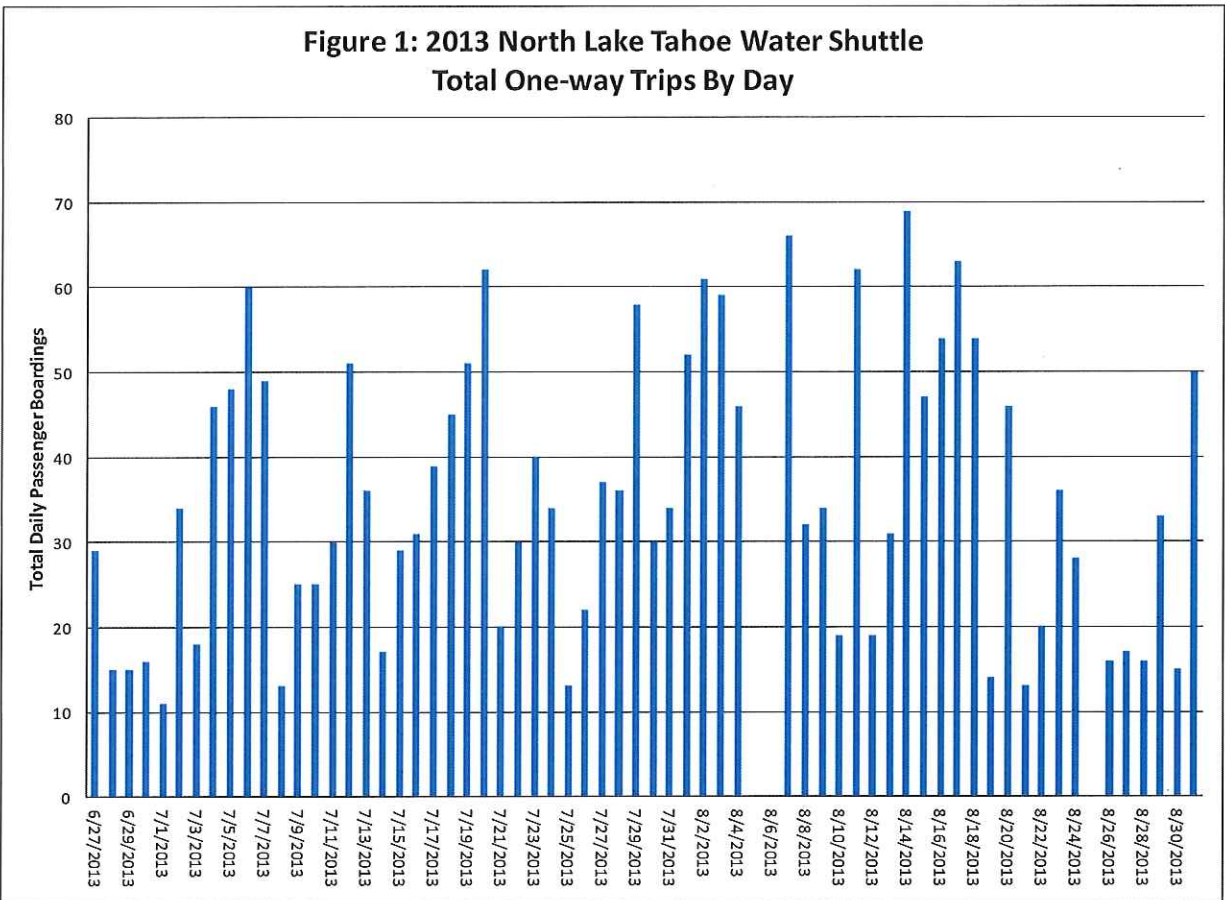
Subtotal by Month		
June	75	3
July	1074	98
August	1072	86
September	277	36

Average Daily by Month		
June	19	1
July	35	3
August	38	3
September	13	2

Source: Captain's logs.

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*Bicycles*

A total of 223 bicycles were carried on the Water Shuttle over the course of the season, with as much as 29 carried on the peak day (Monday, July 29). Most of the bicycle boardings occurred in Homewood (45 percent) or Tahoe City (40 percent).

*Walk-on Ticket Purchases*

As mentioned above, starting in 2013 “walk on” passengers were allowed to purchase tickets from the Captains at the boat. Over the course of the summer, 438 passengers boarded as walk-ons, which is equivalent to 18 percent of total ridership. Just under half of these passengers boarded at Tahoe City (198). The level of walk on activity at the West Shore Café, Obexers and Tahoe Vista were very similar, ranging from 65 to 70 passengers, while only 36 walk-on passengers were served at Carnelian Bay. Overall, the ability to accommodate walk-on passengers was a benefit to the program.

**Service Performance**

Service was not provided on a total of six days and was also suspended on one day before any passengers were served, due to weather or smoke conditions. On an additional 25 days,

**Table 2: Water Shuttle Boarding and Alighting by Stop and Time**

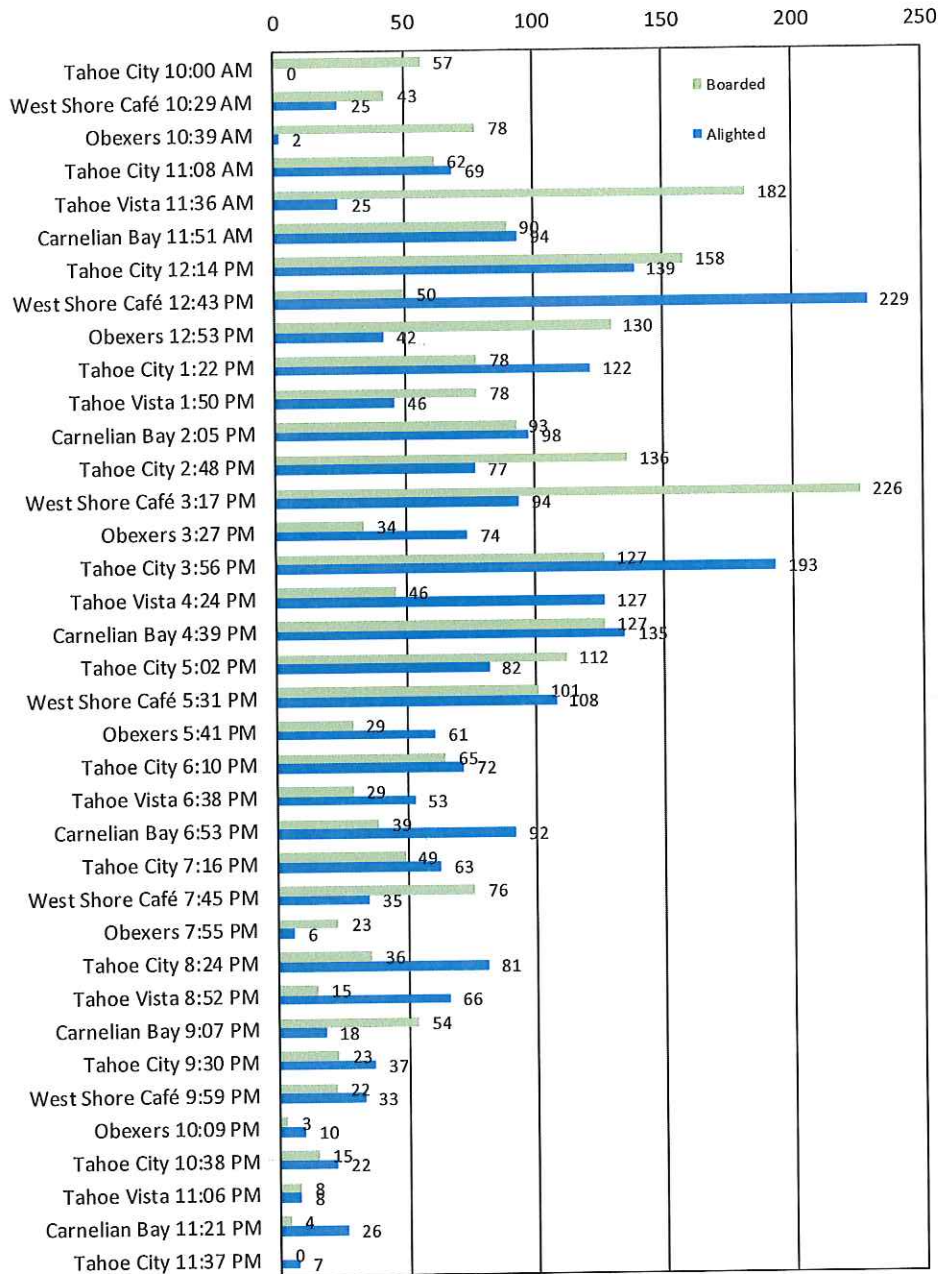
Time	Location	# Passengers			# of Bicycles		
		Boardings	Alightings	Total	Boardings	Alightings	Total
10:00 AM	Tahoe City	57	-	57	9	-	9
10:29 AM	West Shore Café	43	25	68	13	9	22
10:39 AM	Obexers	78	2	80	6	0	6
11:08 AM	Tahoe City	62	69	131	8	19	27
11:36 AM	Tahoe Vista	182	25	207	25	4	29
11:51 AM	Camelian Bay	90	94	184	0	4	4
12:14 PM	Tahoe City	158	139	297	20	12	32
12:43 PM	West Shore Café	50	229	279	2	15	17
12:53 PM	Obexers	130	42	172	36	19	55
1:22 PM	Tahoe City	78	122	200	9	30	39
1:50 PM	Tahoe Vista	78	46	124	2	4	6
2:05 PM	Camelian Bay	93	98	191	2	7	9
2:48 PM	Tahoe City	136	77	213	20	2	22
3:17 PM	West Shore Café	226	94	320	18	12	30
3:27 PM	Obexers	34	74	108	9	8	17
3:56 PM	Tahoe City	127	193	320	8	23	31
4:24 PM	Tahoe Vista	46	127	173	2	10	12
4:39 PM	Camelian Bay	127	135	262	2	0	2
5:02 PM	Tahoe City	112	82	194	4	2	6
5:31 PM	West Shore Café	101	108	209	8	2	10
5:41 PM	Obexers	29	61	90	8	2	10
6:10 PM	Tahoe City	65	72	137	6	13	19
6:38 PM	Tahoe Vista	29	53	82	0	7	7
6:53 PM	Camelian Bay	39	92	131	0	2	2
7:16 PM	Tahoe City	49	63	112	2	0	2
7:45 PM	West Shore Café	76	35	111	0	0	0
7:55 PM	Obexers	23	6	29	0	2	2
8:24 PM	Tahoe City	36	81	117	0	0	0
8:52 PM	Tahoe Vista	15	66	81	0	0	0
9:07 PM	Camelian Bay	54	18	72	0	0	0
9:30 PM	Tahoe City	23	37	60	4	0	4
9:59 PM	West Shore Café	22	33	55	0	4	4
10:09 PM	Obexers	3	10	13	0	0	0
10:38 PM	Tahoe City	15	22	37	0	0	0
11:06 PM	Tahoe Vista	8	8	16	0	0	0
11:21 PM	Camelian Bay	4	26	30	0	0	0
11:37 PM	Tahoe City	-	7	7	-	0	0

Total by Stop						
Tahoe Vista	358	325	683	29	31	60
Camelian Bay	407	463	870	4	25	29
Tahoe City	918	964	1882	90	101	191
Obexer's	297	195	492	59	31	90
West Shore Café	518	524	1042	41	42	83
Total Homewood	815	719	1534	100	73	173

Percent of Total by Stop						
Tahoe Vista	14%	13%	14%	13%	13%	13%
Camelian Bay	16%	19%	18%	2%	11%	6%
Tahoe City	37%	39%	38%	40%	44%	42%
Obexer's	12%	8%	10%	26%	13%	20%
West Shore Café	21%	21%	21%	18%	18%	18%
Total Homewood	33%	29%	31%	45%	32%	38%

Source: Captains Logs

**Figure 2: Boarding and Alighting by Stop and Time**



service was suspended for a portion of the day (typically late afternoon). On a total of three days, North Tahoe Marina was used to drop passengers when conditions at Captain Jon's were too rough.

On time performance was tracked based on Captain Logs. Delays were based on actual departure times and categorized as 5-10 minutes late, and 11-20 minutes. No delays beyond 20 minutes were observed as typically a stop was skipped to make up the time. Departures within 5 minutes of the scheduled time were considered to be "on time." On-time performance records are presented in Table 3. Overall, the service had an impressive record of on-time performance, with 96 percent of departures occurring on time. The service operated 5-10 minutes late on 3 percent of the trips, and 11-20 minutes late less than 1 percent of the trips.

A total of 206 stops were missed by the water shuttle. This represents approximately 7% of all trips made by the service. Of the 206 missed stops, 140 were due to weather holds. The majority of the holds were due to high wind and waves at Captain Jon's. Lightening and poor visibility due to smoke were other reasons for weather-related holds. A total of 48 stops were missed at the West Shore Café due to pre-planned events. Only 18 missed stops were not due to weather or the closure of the West Shore Café. Of these, 4 were due to the boat being full, with no passengers needing to alight at the next stop. As a result, of the 206 missed stops only 14 were due to either unexpected maintenance or schedule difficulty. These 14 missed stops represent less than half a percent of all scheduled stops.

Overall, this data indicates that the schedule allows adequate time to maintain an on-time service, and that the operator was diligent in providing a high quality of on-time service.

## Review of New Dock Locations

### *Obexer's Marina*

Reflecting that private parties renting the West Shore Café (such as for weddings) precludes use of West Shore Café by the Water Shuttle, Obexers Marina was added as a stop for the 2013 season.<sup>1</sup> Located on the West Shore of Lake Tahoe, Obexer's Marina and Boat Company is the most southern stop along the water shuttles route. Though it is only a quarter mile south of the West Shore Café stop it is still a good addition to the list of serviced docks. This site provides an open dock with calm waters and no parking constraints.

The dock at Obexer's is tall and typical passenger egress and ingress requires the use of a permanently mounted dock ladder. However a second docking location within the marina is available if needed for wheelchair access.

### *North Tahoe Marina (Tahoe Vista)*

The North Tahoe Marina, located approximately 800 feet east of the Captain Jon's stop, served as a backup location during high wind conditions. The Marina has protected inner dock space and accommodates the water shuttle when conditions do not allow docking at Captain Jon's. However the Marina is only open till 6:00 PM and will only allow water shuttle passengers to

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<sup>1</sup> West Shore Café was not available a total of 11 days in 2013.

**Table 3: Summary of On Time Performance**

Day	Date	5-10 min late	11-20 min late	Missed Stop	Missed Stop (Weather)	Missed Stop West Shore Café
Thursday	6/27/2013	1				
Friday	6/28/2013	0				
Saturday	6/29/2013	3				4
Sunday	6/30/2013	0				5
Monday	7/1/2013	2			5	
Tuesday	7/2/2013	2				
Wednesday	7/3/2013	1			6	
Thursday	7/4/2013	3	1			
Friday	7/5/2013	1	1		3	
Saturday	7/6/2013	4			3	
Sunday	7/7/2013	2				
Monday	7/8/2013	1				
Tuesday	7/9/2013	2				
Wednesday	7/10/2013	5	1		3	
Thursday	7/11/2013	1			3	
Friday	7/12/2013	0				
Saturday	7/13/2013	2		1		
Sunday	7/14/2013	3				
Monday	7/15/2013	1				
Tuesday	7/16/2013	3		2	2	
Wednesday	7/17/2013	0		1		1
Thursday	7/18/2013	1		2		
Friday	7/19/2013	1				
Saturday	7/20/2013	3				
Sunday	7/21/2013	2				
Monday	7/22/2013	1	3	5	2	
Tuesday	7/23/2013	1				
Wednesday	7/24/2013	1				
Thursday	7/25/2013	2			7	
Friday	7/26/2013	0			3	
Saturday	7/27/2013	0				
Sunday	7/28/2013	0				
Monday	7/29/2013	0	2		4	
Tuesday	7/30/2013	0			3	
Wednesday	7/31/2013	4				
Thursday	8/1/2013	4	2		5	
Friday	8/2/2013	2				
Saturday	8/3/2013	0				
Sunday	8/4/2013	0				
Monday	8/5/2013	No Service				
Tuesday	8/6/2013	No Service				
Wednesday	8/7/2013	0		1		
Thursday	8/8/2013	1				4
Friday	8/9/2013	1	1		3	
Saturday	8/10/2013	0		1	2	
Sunday	8/11/2013	1				
Monday	8/12/2013	0				
Tuesday	8/13/2013	2				
Wednesday	8/14/2013	0				
Thursday	8/15/2013	2				
Friday	8/16/2013	0		1		
Saturday	8/17/2013	6				
Sunday	8/18/2013	0				
Monday	8/19/2013	0			3	
Tuesday	8/20/2013	1			5	
Wednesday	8/21/2013	1			12	
Thursday	8/22/2013	0				
Friday	8/23/2013	0				
Saturday	8/24/2013	2			2	
Sunday	8/25/2013	1	1		13	
Monday	8/26/2013	0			10	
Tuesday	8/27/2013	1			3	
Wednesday	8/28/2013	1			2	
Thursday	8/29/2013	1			4	
Friday	8/30/2013	0				
Saturday	8/31/2013	2				
Sunday	9/1/2013	0				
Monday	9/2/2013	2	1		7	
Tuesday	9/3/2013	0		3	3	
Wednesday	9/4/2013	0				
Thursday	9/5/2013	No Service				
Friday	9/6/2013	0			3	3
Saturday	9/7/2013	4				3
Sunday	9/8/2013	4		1		5
Monday	9/9/2013	0	1			4
Tuesday	9/10/2013	0				
Wednesday	9/11/2013	0			3	4
Thursday	9/12/2013	1				
Friday	9/13/2013	1			5	5
Saturday	9/14/2013	1				5
Sunday	9/15/2013	0	1		5	5
Monday	9/16/2013	0	1		6	
Tuesday	9/17/2013	No Service				
Wednesday	9/18/2013	0				
Thursday	9/19/2013	0				
Friday	9/20/2013	No Service				
Saturday	9/21/2013	No Service				
Sunday	9/22/2013	0				

depart (but not board) on their dock. Parking and loading are not permitted. This location was used only three times during the 2013 season.

### **On Board Passenger Survey**

LSC Transportation Consultants conducted on-board passenger surveys on the North Tahoe Water Shuttle as a means to gauge passenger's travel characteristics and opinions on the service. The surveys were conducted on July 19 (Friday), August 17 (Saturday), and September 14, 2013 (Saturday). The survey dates were selected to capture peak summer and fall conditions. The surveyor was on board for all runs that had water shuttle. The surveyor asked questions and recorded the responses, rather than having passengers complete the forms. For persons traveling in groups, one survey was conducted for the group as a whole.

A total of 23 surveys were completed. In the 23 groups surveyed, a total of 80 individual persons were represented. The following is a summary of the on-board survey results, as well as a summary of the comments made by passengers.

*Are you a visitor to Lake Tahoe, or a resident?*

Based in the number of surveys or total parties, approximately 61 percent were overnight visitors, 4 percent were day visitors, 22 percent were seasonal residents, and 13 percent were permanent residences.

*How many people are traveling in your party?*

The average group size was 3.5, with the largest group having 6 members. Only one person surveyed was traveling alone.

*How many of the people in your travel party are 16 years old or younger?*

Of the 23 parties surveyed, 8 had members under the age of 16. Of the 80 individuals represented by the surveys, 17 (21 percent) were under the age of 16.

*How many of the people in your travel party are 65 years old or older?*

Of the 23 parties surveyed, 12 had members over the age of 65. Of the 80 individuals represented by the surveys, 25 (31 percent) were over the age of 65.

*Does anyone in your travel party have a disability that makes it difficult to get around?*

Of the 23 parties surveyed, 3 parties responded yes to this question, with the remaining 20 responding no. All three parties responding yes to this question had a single member of their party with a mobility disability. No groups surveyed had a member of their party who uses a wheelchair.

*What pier are you traveling from today?*

Of total responding groups, 35 percent began their trip from Homewood (31 percent from Obexer's and 4 percent from West Shore Café), 44 percent from Tahoe City, 4 percent from

Carnelian Bay, and 17 percent from Tahoe Vista. Based on the total number of individuals surveyed approximately 41 percent began their trip from Homewood (36 percent from Obexer's and 5 percent from West Shore Café), 41 percent from Tahoe City, 3 percent from Carnelian Bay, and 15 percent from Tahoe Vista.

*What pier are you traveling to today?*

Based in the number of surveys, or total parties, 22 percent traveled to Homewood (4 percent to Obexer's and 18 percent to west Shore Café), 30 percent to Tahoe City, 26 percent to Carnelian Bay, and 9 percent to Tahoe Vista. Thirteen percent of groups surveyed did not respond to this question. Based on the total number of individuals surveyed, 23 percent traveled to Homewood (3 percent to Obexer's and 20 percent to West Shore Café), 30 percent to Tahoe City, 26 percent to Carnelian Bay, and 9 percent to Tahoe Vista. Twelve percent of persons represented in the surveys did not respond.

*How did you get to the water shuttle today?*

Slightly more than half of the groups (57 percent) arrived by car (13), 4 percent were dropped off (1), 9 percent by bike (2), 17 percent walked (4), and 13 percent arrived by taxi (3). Based on the total number of individuals surveyed, approximately 52 percent arrived by car (42), 3 percent were dropped off (2), 11 percent traveled by bike (9), 15 percent walked (12), and 19 percent arrived by taxi (15). No survey respondents reported using a bus of any jurisdiction to access the water shuttle.

*If parked at stop, where did you park?*

There were 15 groups that responded to this question. The responses are as follows:

- Of groups parking in Homewood, 2 groups parked at the West Shore Café, 2 groups parked at Obexer's Marina, 1 group parked on the highway near Obexer's Marina and 3 groups parked at other locations (post office, West Shore Pizza, and a disabled parking spot) near Obexer's Marina.
- In Tahoe City, 4 groups parked at the Boatworks/Marina parking lot, and 1 group parked on the highway.
- In Tahoe Vista, 1 group parked at Captain Jon's and 1 group parked on the highway.

*Are you making a round-trip today on the water shuttle?*

Sixty-one (61) percent (14 of the 23 parties) and 54 percent (43 of the 80 persons) of the respondents said they were making round trips.

*If no, how are you getting back to where you started your trip?*

Of those groups which were not planning on making round trips, 2 were going to bike, 3 stated that they were going to be picked up, and 3 said they were going to use a taxi.



*What will you do as part of your trip today?*

Based in the number of total parties, approximately 13 percent said they would be shopping, 70 percent said they would be dining, and 9 percent stated that they would be going to the beach. Most respondents said that would engage in more than one activity; thus the total percentage exceeded 100 percent. In addition to the three most popular responses, biking, rafting, and just riding the shuttle were also listed as replies.

*How did you learn about the Water Shuttle?*

Of the 21 groups surveyed that answered this question, the following responses were recorded (multiple responses allowed):

Print	48 percent
Family or Friends	29 percent
Saw the boat	24 percent
From a Local Employee	5 percent

*On a scale of 1 to 5, with 1 being poor and 5 being excellent, please rate the service on the following factors:*

- *Attractiveness of the boat* -- Of the 21 surveyed, 17 reported 'excellent', and 4 reported 'good'.
- *Ease of getting on/off the boat* -- Of the 21 surveyed, 19 reported 'excellent', 1 reported 'good', and 1 reported 'poor'. The one group that reported 'poor' was one person traveling alone and did not report being under 16, over 65, or having a mobility disability.
- *Schedule* -- Of the 21 surveyed, 14 reported 'excellent', 5 reported 'good', and 2 reported 'fair'.
- *Fare Level* -- Of the 20 surveyed, 15 reported 'excellent', 4 reported 'good', and 1 reported 'fair'.
- *Reservation process* -- Of the 20 surveyed, 14 reported 'excellent', 0 reported 'good', 4 reported 'fair', 1 reported 'mediocre', and 1 reported 'poor'.
- *Overall* -- Of the 20 surveyed, 17 reported 'excellent', and 3 reported 'good'.

*If you were not riding the Water Shuttle today, what do you think you would have been doing instead?*

Of the 20 groups that responded to this question, 6 would have driven to the same location, 5 would have driven to a different location, 2 would have gone biking or walking, and 7 would have stayed home.

*Do you have any suggestions to improve the Water Shuttle?*

Suggestions to improve service included:

- Provide tourist information on board
- Sell multi-ride ticket package at a discount
- Provide a greeter at boarding gate
- Sell water on board
- Better signage directing passengers to the boarding location and provide shuttle schedule on signs
- Cheaper round trip fare
- Add stops at Sunnyside and Chambers Landing
- Provide service to Stateline and Sand Harbor
- Should be able to change reservations
- Serve alcohol on board

*Should the Water Shuttle be operated in future years? Y/N*

Twenty-one (21) groups responded to this question. Twenty (20) responded 'yes' and one responded 'maybe'.

**On-line Surveys**

North Lake Water Shuttle passengers were asked to complete an on-line survey. In total, 32 surveys were completed. The survey results are summarized below.

*Pickup Location*

Location	Number	Percentage
Obexer's	3	9%
West Shore Café	6	19%
Tahoe City Marina	14	44%
Carnelian Bay	1	3%
Captain Jon's	5	16%
No Response	3	9%

*Drop-Off Location*

Location	Number	Percentage
Obexer's	1	3%
West Shore Café	6	19%
Tahoe City Marina	6	19%
Carnelian Bay	2	6%
Captain Jon's	4	12%
Round Trip	8	25%
No Response	5	16%

*Date of Service*

Of 26 responses, 3 rode the water shuttle in June, 22 rode the water shuttle in July, 1 rode the water shuttle in August, and no survey respondents rode the water shuttle in September.

*Day of Week of Service*

Of 26 responses, 1 rode the water shuttle on Sunday, 1 rode the water shuttle on Monday, 3 rode the water shuttle on Tuesday, 3 rode the water shuttle on Wednesday, 9 rode the water shuttle on Thursday, 3 rode the water shuttle on Friday, and 6 rode the water shuttle on Saturday.

*Was your shuttle on time?*

Of the 31 responses to this question, 30 survey respondents reported 'yes' and 1 reported 'no'.

*Captain and First Mate friendly?*

All 31 respondents indicated "yes".

*Captain and First Mate knowledgeable?*

All 31 respondents indicated "yes".

*Did you feel safe with Captain and First Mate?*

All 31 respondents indicated "yes".

*Was the boat clean?*

All 31 respondents indicated "yes".

*Would you use this service again?*

Of the 31 respondents, 30 reported 'yes' and 1 reported 'no'. This was the same respondent that reported that the shuttle was not on-time.

*How likely are you to recommend this service to others?*

Of the 31 responses to this question, 30 indicated 'very likely' and 1 reported 'possibly'.

*Overall experience?*

Of the 31 responses, 29 survey respondents reported 'excellent', 1 reported 'very good' and 1 reported 'satisfactory'.

### *Additional Comments*

Those who completed the survey were given the option of providing their comments about the service. Some of the notable responses are summarized as follows:

- This is a great service
- Provide stops at residential locations (Tahoe Tavern, Chinquapin, Dollar Point, etc.) at night
- We have recommended this service to others
- Ride was expensive compared to service and experience
- Captain was friendly and knowledgeable
- Liked the surfing music from 2012
- Run service year-round for legitimate transportation purposes
- Increase ridership and reduce cost
- Needs more advertising
- Needs more stops
- Provide iPhone app for booking reservations
- Provide unlimited day pass, season-pass options

The full list of comments is provided in the appendix.

### **Financials**

A summary of the expenses and revenues associated with the program is shown in Table 4. The largest expense (\$137,781) is for the operation of the service. Other costs include program management, marketing expenses for production of materials and media buys, reservation system fees, banking fees, monitoring, and permit costs.

The program revenues consist of \$157,781 in Transient Occupancy Tax (TOT) from the NLTRA/Placer County, \$24,320 in passenger revenues, \$500 in on-boat advertising, and \$4,295 in rollover funding from the previous year. As indicated, these revenues and costs result in a net positive balance of \$5,428, which is available as rollover for funding 2014 operations.

In comparing 2013 figures with those of the 2012 season, total costs were \$2,332 lower in 2013 (2 percent). While the funds paid to the service contractor were higher (reflecting the increased number of days of service), this was more than offset by reductions in reservation, marketing and other start-up costs. TOT revenues were reduced by \$29,219 (16 percent), while fares increased by \$12,920 (a full 113 percent).

### **Performance Analysis**

Using the figures presented above, a series of performance measures can be calculated:

- Passenger-Trips per Vessel-Hour of Service – 2.7 (2,498 passenger-trips divided by 918 operated vessel-hours)

<b>TABLE 4: TMA Water Shuttle Revenues and Expenses</b>	
2013-14 End of Season	
<b>Revenues</b>	
NLTRA (Transient Occupancy Tax)	\$157,781
Farebox (1)	\$24,320
On-Boat Advertising	\$500
Rollover Funding from 2012-13 Season	\$4,295
<b>Total</b>	<b>\$186,896</b>
<b>Expenses -- TNT/TMA</b>	
Contracted Operations	\$137,781
Program Management	\$20,000
Marketing Materials/Ad Design	\$12,320
Marketing Management	\$5,000
Distribution - Contract Services	\$1,499
IT/Reservations System (2)	\$2,135
Bank Fees	\$379
Permits/Landing Site Improvements	\$1,000
Signage	\$1,354
<b>Total Expenses</b>	<b>\$181,468</b>
<b>Net Balance (Rollover Funding for 2014)</b>	<b>\$5,428</b>
Note: Program Monitoring Report paid from Research/Planning funds.	
Note 1: Including \$935 retained by Silver Voyages for reservation system costs.	

- Total Cost (operations, marketing and administration) per Passenger-Trip – \$73 (\$181,468 divided by 2,498 passenger-trips)
- Subsidy (excluding fare revenues and advertising revenues, but including net rollover) per Passenger-Trip – \$63 (\$156,648 divided by 2,498 passenger-trips)

In reviewing these figures, there are several factors that should be considered:

These figures include capital costs, specifically Fineline's amortization of the boat costs as well as a modest amount of other capital items (signs). Under the terms of the current 3-year contract, boat amortization costs will continue. As these financial figures include capital costs, they cannot be directly compared with typical transit operating or subsidy per passenger-trip figures, which exclude capital costs.

- New public transit services typically require three years of operation before full potential ridership is achieved. A standard rule of thumb is that ridership in the second year is 90 percent of the full potential ridership, indicating that barring other changes ridership in 2014 would be approximately 10 percent greater than in 2013. The fact that a majority of the passengers surveyed indicated that they learned of the service through "friends and family" reinforces that ridership will grow as more of the community knows of the service at the outset of the summer season.

## Boat Operator Comments

Fineline Industries was contracted to run the operations for the North Lake Water Shuttle for a 2nd year. The Project Manager and Captains were asked to provide their observations and comments, as summarized below:

- The reservation system should be accessible to the boat captains. Though they are able to get a real-time update of the passenger manifest from the reservation system, they are not able to input reservations. This becomes a problem with walk on passengers wishing to book a round trip so that a spot is guaranteed for their return. Currently the boat captains are able to take payment of a one way trip, and the passenger must call to make a reservation (and a second payment) for the return trip. This has caused problems, as the phone reservation system was often unstaffed and a return call was generally never received. The captains felt that this was disservice to walk on passengers.
- There were also difficulties in the reservation program blocking specific runs during weather holds. The Captains should have the ability to do this from the boat.
- In general, passengers should be encouraged to make reservations, by having marketing materials indicate that reservations are recommended, in order to reduce the hassles associated with return trips.
- Available seating capacity was generally sufficient, at least for those passengers waiting at the piers. Passengers were turned away roughly six times over the course of the season.
- More Marketing. The boat captains were discouraged when talking to local businesses about the water shuttle. Many of the local business did not know to the service. Rack cards of local services and activities found at business sometimes did not have flyers for the North Tahoe Water Shuttle. Suggestions to expand marketing consisted of the following:
  - Provide rack cards to boat crews, so they can walk around the dock areas in their down times to make sure that racks are staffed.
  - Promote the Water Shuttle at community events, such as Truckee Thursdays.
  - Develop an iPhone app for the water shuttle.
  - Hold pre-season meetings between the staffs of the operator, reservation system, and dock establishments to familiarize all with the operations and opportunities of the service. Boat staff needs more information on what activities are available at each stop, while dock and reservation staffs need a better understanding of how the service operates.
  - Offer "specials" such as reduced fares after 9 PM or in the shoulder seasons, or packages with local bike rental shops or restaurants.

- No complaints were received regarding the frequency of service. A few passengers indicated a desire for an earlier run. The greatest request was for service to other locations, including Kings Beach, the Hyatt, Sunnyside, Chambers Landing, and Dollar Point.

### **Pier Property Manager Comments**

Feedback from the property managers was collected. Interviews with pier owners or managers of the piers were conducted by telephone. In addition to general feedback, six questions were prepared ahead of time in order to obtain input on specific topics.

1. Overall, how well did the operation of the Water Shuttle at your dock work last summer?
2. Were there any conflicts with other boaters? (Describe – frequency, specific times of day, etc.)
3. Were there any issues on the dock, or passengers walking to/from the dock? (Describe)
4. How did the new hours of operations work? Where there any issues with the evening service and operations when it was dark.
5. Do you have any suggestions as to how to improve the Water Shuttle?
6. Are you interested in the Water Shuttle serving your dock next summer?

#### *Jim Phelan - Tahoe City Marina*

1. Water Shuttle program worked fine.
2. Heard from a 3<sup>rd</sup> party that the Shuttle came into the marina too fast, exceeding the speed limit. He had no firsthand account of this incident and was only reported once.
3. No observed issues with passengers walking on the dock.
4. The night time operations went smoothly. No issue with poor lighting, which was a concern as a potential problem.
5. Need to have the shuttle schedule printed on the main sign. A second sign needs to be located at the slip where the shuttle will pick up.
6. Would be interested in having the Water Shuttle serve the Tahoe City Marina next summer.

#### *Tom Turner - Garwood's Grill and Pier*

1. The Water Shuttle service worked fine.
2. No specific boater conflicts. There was some congestion and delay.
3. No issue with passengers walking on the pier. Bikes, however, posed a hazard on the narrow dock.
4. The evening service worked well, though it did not contribute to any additional restaurant business.
5. The 12 passenger occupancy of the boat limits large groups. Should have an open alcohol policy.
6. Would be interested in the Water Shuttle serving this location next summer.

#### *Keith Fields – Obexer's Marina*

1. The shuttle service was excellent. Really likes the water shuttle program.
2. No boater conflicts.
3. No passenger or dock issues.
4. Thought the schedule worked well, no issues with running in the evening.

5. Thinks that the service is underutilized by the local population. Believes that most people do not even know about it. A local mailer should be distributed.
6. Would like to have the shuttle serve Obexer's next summer.

### Conclusions and Recommendations for the Summer of 2014

The changes in the schedule and fare procedures proved effective, resulting in a 105 percent increase in ridership and a 48 percent in daily ridership.<sup>2</sup> The productivity of the service, as measured in the number of passengers served per vessel-hour of service, increased by 51 percent.

While fare revenues more than doubled from 2012 levels, overall program revenues remain far below the operating costs. Including both fares and advertising revenues, these revenues covered only 13 percent of the total cost of the program. Program costs would be expected to drop after the 2014 season and the end of the current 3-year contract, which includes the amortization of the capital costs of the boat. This in turn would raise the proportion of costs covered by operating revenue. While identifying how much the costs would decrease would require discussions with the operator, the need for subsidy funding would undoubtedly still remain.

Regarding the 2014 season, the key concern is the need to provide ongoing funding. The current allocation, made prior to the initialization of service, is for \$380,000. Including both funds expended in 2012 (\$208,586) and the \$157,781 for the 2013 season, a total of \$366,367 will have been expended in the first two years of the three-year contract period, leaving \$13,633 plus \$5,428 in rollover funds available for the 2014 season. On the order of \$135,000 in additional funding would be required to operate a 2014 service similar to the 2013 service, under the current contract.

Beyond the current contract, which runs through the 2014 season, there is the opportunity for a new contract that does not include the amortization of the vessel. The resulting lower rate could in turn reduce the level of ongoing subsidy.

Assuming that funding decisions allow service to be provided in 2014, the following are conclusions and recommendations regarding how this service should be operated. Service operations worked well in 2013, with service operating generally on schedule and with only a few incidents where events within the operator's control affected service. Procedures to suspend service worked better than in 2012, though better communication between the reservation system and the boat crew should be established.

Based on the information discussed above, LSC has the following recommendations for changes in the Water Shuttle in 2013:

- Operating hours should be modified to end service earlier (around 10:00 PM throughout the service season, rather than 11:37 PM). Ridership volumes dropped off significantly on the last run of the evening. However, the current contract requires payment of a minimum of

<sup>2</sup> Ridership would have been somewhat higher if not for the many days of smoke from the Rim Fire, which both curtailed operations and reduced the attractiveness of the service.



1,080 hours of service per season. Any reduction in the days or hours of service would need to be considered in light of this requirement, or would require re-negotiation of the contract.

- If the North Tahoe Marina in Tahoe Vista is to be used as a back-up location, a better working relationship will be needed with the Marina staff. Given the limited number of times that this was used in 2013, it may not be worth the resulting confusion to passengers.
- The boat crew should have greater ability to access the reservation system to make return trip reservations or to indicate weather holds.
- The web reservation system needs to be upgraded to allow for passengers to book round-trips prior to purchase of the first leg.
- Better signage should be installed to direct passengers to the loading location (particularly at the Tahoe City Marina), and to have them wait in an appropriate location. Signs should include the shuttle schedule, as this would aide guests in using the service.
- Reservation staff needs better knowledge of the area and the service. A half-day of training of reservation staff should be a mandatory requirement for 2014.
- Additional marketing should be implemented in 2014, including additional local radio buys, seasonal "permanent" signage at piers, increased cross-marketing with other NLTRA marketing efforts (such as having the water shuttle in the background of summer photos), cross-promotions with local bike shops and restaurants, and earlier marketing efforts to catch those planning their summer travels in late winter.

Beyond the current contract, which runs through the 2014 season, there is the opportunity for a new contract that does not include amortization costs of the vessel. The resulting lower rate could in turn substantially reduce the level of ongoing subsidy.

## **APPENDIX A**

### **On-Board Passenger Survey Comments**

I have been an avid proponent with friends. I would use more, but have not visited as much this summer.

It is a great service. I have already recommended to others!

This is a great service. It might be helpful to try and see if you can pick up at some of the more residential areas (Tahoe Tavern, Chinquapin, Dollar, etc.) in order to get better ridership at night.

We have already recommended it to others!

Someone did not show up to work, so trip was delayed. Level of professionalism by crew was lacking. Ride was expensive for level of service.

Captain was very good and knowledgeable, and his mate too was very friendly and knowledgeable. We did recommend some other friends to use the service when they came through on their way back home from Oregon. They too said it was the highlight of their trip to Tahoe City.

Thanks Jamie and Joe. Enjoyed the ride!!

No Response.

We liked the surfing tunes in 2012.

I have recommended the water shuttle to friends already, and we plan to use the water shuttle next time we are in Tahoe.

Since it was early in the season, the two people I spoke with on the phone were not well informed about all of the round trip possibilities, but the first captain who picked us up was great, and we were then able to go where we wanted, stay, then return later. I have recommended it to friends!

First time to use the shuttle service. Made a round-trip (w/o getting off the boat) to get a quick tour of the lake. It was a good experience, and I would recommend the shuttle to others.

This service is fantastic. Honestly, if it was running for most of the year, I think folks would start to depend on it for legitimate transportation. Great way to get past the Tahoe City Hwy 89 summer gridlock from the West Shore!!

Advertise more as this is a great service!

It's a great way to have a boat ride for a reasonable price.

Hopefully with more ridership, the cost can come down. I would use it more often if the cost was \$5 each way.

Have recommended this to many people!!!

You need to do more advertising - How about big signs on your buses. We need this delightful service.

Would use this definitely again. Beats getting from Tahoe Vista to Tahoe City without the dang traffic. Loved being on the water. The Captain took our photo while on board and we met a nice couple and their kids from Colorado. Can't do that in a car!

Need more stops - incentive for businesses to encourage to their customers.

This will become a yearly outing for us and we will tell all our guests and renters. We will get the word out there. Perhaps a little more info for people on things to see or do at the different destinations that are walking distance from drop-off.

Great idea and great service. Need iPhone app to book service.

I would like to see the shuttle extended to Kings Beach. Maybe see pricing for an all day unlimited ride ticket. Prices for a full season ticket. This is an excellent service and I intend to use it again this season. Please keep it going.

We will use this service at least one time per season. It should be easier for your on-board staff to check on reservations and take on walk up passengers. You also could make a little extra money by selling bottled water on the boat.

Best kept secret.

We took your shuttle Sunday it was fantastic!!! Not only were we on the lake we had no parking hassles nor worries about driving back to the cabin!!! And our twin four year old grand kids had the time of their lives especially with the captain kidding with them! Arrrrggh!!! A little wild coming back but was a perfect service for us!!! Thanks and keep up the great work.