

**LTD Board Strategic Workshop  
February 3-4, 2005**

**Thursday, Feb. 3<sup>rd</sup>**

3:30 p.m. Transit 101 (service design, LTD current and planned, service policy, comparisons to other systems, issues, and policies)

6:30 p.m. Dinner (Board Members only for member discussions)

**Friday, Feb. 4<sup>th</sup>**

8:30 a.m. Strategic Plan review and update

Noon Lunch

12:45 p.m. Strategic Plan (if needed)  
LTD Board Organization (committees, legislative, other)

4:00 p.m. Adjourn

## **EXECUTIVE SUMMARY**

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In 1997, the Board of Directors of Lane Transit District (LTD) adopted a Strategic Plan that was developed through a comprehensive plan development process. The plan updated the district's mission and goals, and was designed to determine the organization's direction and to focus organizational efforts to achieve the District's mission. The plan endeavored to set a vision for the future that, combined with financial and operational plans, became the road map for achieving LTD's long-term objective of enhancing the community's quality of life.

Since the 1997 plan was adopted, minor changes have been made to the plan, but none since 1998. In 2002, the Board of Directors directed the General Manager to update the strategic plan as part of the General Managers Goals and Objectives for 2002-2003. The District's vision, mission statement, and guiding principles were updated in 2001 and will form the basis for the new Strategic Plan. The 2003 Strategic Plan is based on the development of five goal statements that reflect the District's Mission Statement and Goals. The Board's goal was to create a dynamic plan that was closely tied to the District's short-range financial plan, and reflected the need to implement an aggressive capital agenda during difficult economic times.

### **Strategic Goal Statements:**

- ❖ DELIVER RELIABLE PUBLIC TRANSPORTATION SERVICE
- ❖ DEVELOP INNOVATIVE SERVICE THAT REDUCES DEPENDENCY ON THE AUTOMOBILE
- ❖ MAINTAIN LTD'S FISCAL INTEGRITY
- ❖ PROVIDE PROGRESSIVE LEADERSHIP FOR THE COMMUNITY'S TRANSPORTATION NEEDS
- ❖ DEVELOP A TEAM ENVIRONMENT

**EXECUTIVE SUMMARY (CONTINUED)**

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For each Goal Statement, a set of Short term implementation strategies were identified and prioritized. Short-term implementation strategies are defined as those that can be completed within the district's two-year capital improvements plan, and are programmed as such in the capital improvements program (CIP). Long-term implementation strategies were also identified for each goal statement as strategies that were a high priority for implementation two to five years from the implementation of the draft strategic plan. Performance measures have been identified for each goal statement. These measures will provide guidelines for developing specific performance indicators to measure LTD's success in achieving the plan goals.

**LANE TRANSIT DISTRICT VISION**

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**To be the best transit system in North America.**

## **LANE TRANSIT DISTRICT MISSION**

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### **Your partner for a livable community**

We enhance the community's quality of life by:

- ❖ Delivering reliable public transit service
- ❖ Offering innovative service that reduces dependency on the automobile
- ❖ Providing progressive leadership for the community's transportation needs

## **LANE TRANSIT DISTRICT CORE VALUES**

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- ❖ **TEAMWORK** – Working together makes sense. We “team” internally and externally to achieve our mission
- ❖ **RESPECT** – We are committed to treating everyone with respect and dignity.
- ❖ **HONESTY** – We are credible, reliable and hold the highest standards of ethical conduct.
- ❖ **INTEGRITY** – We are unshakeable in our integrity and commitment to our Vision, Mission, Values, and Guiding Principles.
- ❖ **ACCOUNTABILITY** – We are accountable for our resources, actions and outcomes.
- ❖ **TENACITY** – We are persistent in pursuing our important mission.

## **LANE TRANSIT DISTRICT GUIDING PRINCIPLES**

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- ❖ **Safety:** People may assume that LTD is safe. We make every effort never to fail them in that responsibility. LTD will have safe employees, practices, equipment, and facilities.
- ❖ **Courtesy:** LTD shall treat all people who come in contact with our organization as our guests. We are sincerely committed to providing comfortable, friendly services.
- ❖ **Efficiency:** We will never stop improving. The LTD Team will continue to find ways to provide innovative transportation solutions while improving productivity and effectively managing public funds. We are deeply committed to delivering efficient services that promote the sustainability of our communities.
- ❖ **Image:** LTD represents the quality of the communities we serve. We have pride in our appearance and demeanor, and create professional facilities and services.

## LANE TRANSIT DISTRICT STRATEGIC PLAN GOALS

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### GOAL: DELIVER RELIABLE PUBLIC TRANSPORTATION SERVICE

Provide high-quality, effective, safe, and reliable service that meets the community's mobility needs.

#### Short-Term Implementation Strategies:

Strategies	Priority	Status
Install the AVL/APC/CAD project by December 2003	Nondiscretionary	Completed
Use APC data to provide route segment and stop-level analysis	Nondiscretionary	Ongoing
Develop RideSource Efficiency & Productivity Standards	Nondiscretionary	Under development
Construct a RideSource facility	Nondiscretionary	Completed in March; grand opening in April
Develop a staff training plan for technology implementation	Nondiscretionary	Some training, but overall plan not yet developed
Develop and implement a facility plan	Nondiscretionary	Integrated into CIP
Improve the efficiency of the fixed-route system	Nondiscretionary	Ongoing
Expand the plan to optimize fleet composition consistent with LTD's service goal	Nondiscretionary	Ongoing
At a minimum, maintain service at the current level for FY 2004-05	Nondiscretionary	Completed
Maintain special events service	Nondiscretionary	Ongoing
Review and refine LTD's productivity goals and standards	High	To be addressed in workshop
Pursue signal priority to service outside of BRT	High	Underway
Pursue additional funding for service (e.g., job access and reverse commute travel needs)	Medium	Ongoing

#### Long-Term Implementation Strategies:

- Update the plan that optimizes fleet composition consistent with LTD's service goal
- Pursue signal priority to service outside BRT
- Adapt service hours based on population and employment growth, subject to financial constraints

#### Performance Measures:



- Annual person-trips
- Trips per service hour
- Percentage of households within one-quarter mile of bus stop
- Service hours per capita
- On-time performance (bus no more than 4 minutes late)
- Percentage of missed trips
- Accident rates per 100,000 miles
- Customer service form complaints per 100,000 passengers
- Good to excellent ratings on rider surveys

**GOAL: DEVELOP INNOVATIVE SERVICE THAT REDUCES DEPENDENCY ON THE AUTOMOBILE**

Provide high-quality, convenient service that attracts new riders, including those who have access to an automobile, in order to help the community meet its current and future transportation needs. Bus rapid transit (BRT) is a key innovative transit strategy that is intended to increase the transit mode share, particularly on congested corridors.

**Short-Term Implementation Strategies:**

Strategy	Priority	Status
Implement EmX <ul style="list-style-type: none"> <li>• Complete the EmX Franklin Corridor</li> <li>• Complete the acquisition of an appropriate EmX vehicle</li> <li>• Develop a real-time passenger information system</li> <li>• Develop and implement fare collection for EmX</li> <li>• Develop a preventive and corrective maintenance plan for EmX</li> <li>• Develop and implement a public relations and marketing plan for EmX construction and service introduction</li> <li>• Collect baseline data for the EmX Franklin Corridor prior to service implementation</li> <li>• Develop an EmX Franklin Corridor staffing/operational plan</li> </ul>	Nondiscretionary	Under construction Under contract Work in progress Decision for free fare demonstration Underway Plan in place Programmed for 2006 Underway
Complete construction of the Springfield Station within the specified timeline	Nondiscretionary	Completed
Complete expansion of the Maintenance building within the specified timeline	Nondiscretionary	Completed
Pursue joint development options for the Springfield Station within the specified timeline	Nondiscretionary	One tenant in place; seeking second tenant

Develop seamless system integration with EmX	Nondiscretionary	Underway
Support nodal development and transit-oriented land uses	Nondiscretionary	Ongoing
Integrate transit planning with nodal development and other metropolitan planning	Nondiscretionary	Ongoing
Track TransPlan Performance Measures for transportation demand management (TDM) and transit	Nondiscretionary	Ongoing
Integrate transit planning with planning for other transportation modes	Nondiscretionary	Ongoing
Develop a policy framework for joint development	Nondiscretionary	Completed
Obtain all environmental and political approvals for the Pioneer Parkway EmX Corridor	High	Underway
Obtain all environmental and political approvals for the next Eugene EmX Corridor	Medium	Delayed
Pursue real-time passenger information to service outside of EmX	Low	Delayed
Implement independent telephone services	Low	Delayed

#### Long-Term Implementation Strategies:

- Expand the BRT system with additional corridors
- Reshape the service system with BRT system expansion
- Pursue real-time passenger information to service outside BRT
- Transition to clean, alternative fuel technology for all the fleet
- Explore new types of services for future implementation

#### Performance Measures:

- Average weekday person-trips
- Percentage of “choice” riders (those who have a transportation alternative)
- Peak-hour modal split on major transportation corridors
- Percent of major corridors with 10-minute service frequency
- Good to excellent ratings on rider surveys
- Good to excellent ratings on community surveys
- Track TransPlan performance measures for Transportation Demand Management and Transit plan elements

**GOAL: MAINTAIN LTD’S FISCAL INTEGRITY**

A fiscally responsible plan should meet both short- and long-range operational and capital needs within a planning horizon defined by the Long-Range Financial Plan (LRFP). In addition, LTD’s ability to obtain advantageous financing for its capital agenda will depend on the quality of the Long-Range Financial Plan. The ability to develop new sources of funding for capital and expand resources for operational support will be critical to LTD’s continued success. In addition, LTD will be a prudent and conscientious custodian of public funds.

**Short-Term Implementation Strategies:**

<b>Strategy</b>	<b>Priority</b>	<b>Status</b>
Plan for debt financing for EmX vehicles	Nondiscretionary	Determined to be unnecessary
Maintain a viable Long-Range Financial Plan and Capital Improvements Program (CIP)	Nondiscretionary	Ongoing
Pursue federal funding for capital projects, including EmX system build-out	High	Ongoing
Pursue established and new sources for federal, state, and local funding	High	Authority for payroll tax increase obtained; other efforts ongoing
Negotiate an appropriate labor contract	Nondiscretionary	In negotiations

**Long-Term Implementation Strategies:**

- Adjust fares to keep pace with inflation
- Seek federal funds through annual appropriation process
- Continue to explore local, state, and federal funding options
- Maintain a five-year window of a 20-year LRFP
- Consider all options for the financing of vehicles and capital projects
- Continue advocating for a regional, coordinated investment strategy to maximize the benefit of state and federal dollars coming into the region
- Maintain unqualified annual independent audits, triennial FTA reviews, and NTD audits with minimal or no findings, and qualify for the GFOA reporting excellence award annually

**Performance Measures:**

- Cost per trip
- Cost per service hour
- Farebox to operating cost ratio
- Percent of operating cost allocated to direct service provision
- Maintenance of minimum operating reserves
- Unqualified annual audit
- Debt-standard (to be defined)

## GOAL: PROVIDE PROGRESSIVE LEADERSHIP FOR THE COMMUNITY'S TRANSPORTATION NEEDS

Success is more readily achieved when there are partners committed to the same goal. In Oregon, where the road fund is limited in both scope and amount, promoting investment decisions to benefit travel modes beyond the automobile is a significant transportation agenda.

### Short-Term Implementation Strategies:

Strategy	Priority	Status
Provide community leadership in developing multi-modal transportation solutions <ul style="list-style-type: none"> <li>• Maximize the opportunities and relationships created through the Transportation Management Area (TMA) transition</li> <li>• Provide consistent leadership and participation at Metropolitan Policy Committee (MPC) meetings</li> <li>• Utilize all available forums for LTD participation in community transportation planning (e.g., Region 2050)</li> </ul>	Nondiscretionary	Ongoing  Completed  Ongoing  Ongoing
Strengthen LTD's partnerships with government agencies <ul style="list-style-type: none"> <li>• Federal Transit Administration (FTA) Region X</li> <li>• State and local governments, ODOT</li> <li>• Legislative agenda</li> </ul>		Ongoing
Create a more visible role for the Board in the community	Nondiscretionary	Ongoing
Increase LTD's profile/involvement in community activities	Nondiscretionary	Ongoing
Increase effective participation in long-range land use and transportation planning		Ongoing
Build new partnerships/allies in the FTA D.C. office and congressional staff offices		Ongoing
Optimize coordinated investment strategies that benefit transit (including local STP programming)		Ongoing
Take a leadership role in implementing TDM strategies		Ongoing
Conduct annual or biennial Board self-evaluations based on strategic planning goals	Medium	Delayed
Conduct a community attitude and awareness survey	Low	Completed

**Long-Term Implementation Strategies:**

- Develop knowledge of transit benefits through school education programs
- Continue to increase the Board's profile in the community
- Conduct a community-wide market research survey
- Address the changing demographics of the community
- Promote partnering with public agencies and community groups
- Continue FTA partnering

**Performance Measures:**

- Good or excellent ratings on community surveys
- Board member participation on key local committees
- Board member responsiveness to geographic constituents

**GOAL: DEVELOP A TEAM ENVIRONMENT**

A team environment cultivates a mutual commitment by LTD to its employees, and by employees to the success of LTD. By working together, we share the tasks and the rewards and recognition of the outcomes. We are mutually committed to our goal because we believe in the principles and the values they represent. Our mutual commitment to our strategic purpose and mission helps define us as a team.

**Short-Term Implementation Strategies:**

<b>Strategy</b>	<b>Priority</b>	<b>Status</b>
Support an active and viable Employee Council	Nondiscretionary	Ongoing
Maintain a positive relationship with ATU	Nondiscretionary	Some positive changes (grievance committee), but overshadowed by current labor negotiations
Define and build TEAM LTD, with the inclusion of the Board of Directors in the TEAM-building process	High	Considering new approach
Create a dynamic internal communication process	High	Much progress, but requires ongoing effort
Develop a comprehensive employee development program	Low	Delayed
Develop an organizational succession plan	Medium	Plan delayed; handled on case by case basis

**Long-Term Implementation Strategies:**

- Implement a dynamic communications process
- Implement a comprehensive employee development program
- Maintain a positive relationship with ATU
- Maintain a positive relationship with the Employee Council
- Continue to build TEAM LTD

**Performance Measures:**

- Percentage of “negative” (unwanted) employee turnover
  - Good to excellent rating on employee scorecard
  - Measure of formal grievances and arbitration
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LTD BOARD STRATEGIC PLANNING WORK SESSION  
February 3-4 2004

DRAFT AGENDA

TOPIC IDEAS	PRIORITY	TIME NEEDED	STAFF ASSIGNED	NOTES
Transit 101				
Organizational Structure				
Revisit Productivity Model				
Strategic Plan – Next Steps				
Capital match/Capital plans				

Q:\Reference\Board Packet\2005\02\Retreat\Draft agenda ideas.doc



### LTD Board Roadmap

Item	October	November	December	January	February	March	April	May	June	July	August	September	October	November	December	June, 2005
Board (Ken)	Preview tools, context, questions.	Hold board retreat (11/06-07)	Fish video for board	Activate board service on committee (Dave K.)	Joint meeting with Eugene City Council (2/23)	DC lobby trip (Linda I)	Finalize board recommendations for Coburg Road strategy	Joint meeting with Springfield City Council	Board officers elected (Jo II)	Train new board and chair start (Jo and Ken I)	Update list of contacts for board vacancy notices as appropriate (Linda I)			New board members approved by Gov. (Linda I)	Senate confirms board members (Linda I)	
	Initiate GM eval. Materials (Mary / Jo I)	Create interim fact sheets re: projects (Andy III)	Get board consensus to process with PR plan	Work session and decision on payroll tax	Make fiscally constrained priority choices	Plan for developing support for payroll tax increase	Board succession plan - Transition of Committees	Board has met with Springfield CC and Board of CC		"Advertise" for board candidates (Linda / Jo I)						
	Complete GM evaluation (Board I)	Meet with Gov's exec appts person Re: LTD board (Linda I)	Approve contract to purchase BRT vehicles (Jeanette II)	Train board on community presentation (PR Person II)	Board members on rubber-chicken circuit - Feb-Yume (PR Person II)											
		Board joint development policy committee (Pat, Gerry, Dave - Chair)	BRT committee looks at Coburg report and options	Set agenda for board presentations	Meeting with Springfield and Eugene City Councils											
		Introduce board assignment calendar at regular board meetings	Board update profiles	Ad Hoc Committee on joint development												
		Talk to Gov's office about board term date inconsistencies (Linda Jo I)		Develop plan for talking to non-government about "New Deal" and need for local support												

## LTD Board Roadmap

Item	October	November	December	January	February	March	April	May	June	July	August	September	October	November	December	June, 2005
<b>Leadership Council (Ken)</b>	Print notes from today's meeting		LC agrees on training oversight rules and process			LC proposes service priorities						Maintain balanced budget				
	Create retreat agenda materials		LC agrees on reprint printing (AVL / APL / CAD)													
	LC agenda on bargaining approach (Mary III)		LC proposes service priorities													
	Deliver board retreat materials															
<b>EmX Franklin (Mark P.)</b>		Begin design, need process (Ron I/II)	Approve plans ODOT / Eugene (Mark II/III)	Negotiate CM / EC contract (Jeanette / Mark III)	Franklin EmX interest groups meet (Steve III/II)	Receive permits (Mark II)	BRT phase I - under construction						EmX construction slows		Test prototype Invero (Ron II)	Construct Eugene
		Sign contract (Jeanette II)	Franklin BmX in materials complete (Sue III)	Apply EmX permits (Mark II)	Underground utilities on Franklin (Mark II)		Ground breaking (Sue II)									
		We have executed contract for new BRT vehicle			Ground breaking?		Begin construction Springfield / Franklin (Mark II)									
<b>EmX Coburg Road (Stef)</b>	Brief Wyden Smith staff			Stakeholder report completed	Meet of CC (2/23) - decide Coburg Rd process	Eugene council reviews St. report		Glenwood BRT plan and timeline								Start segment planning (Jan '05)
<b>EmX Pioneer Parkway (Stef)</b>	Composition for future needs (Ron III)	Board agrees on timing and increase (Diane / Ken I)	"Protective buy" approved by FJA	"Extension" segment design completed				Preliminary draft EA / ES completed		EA / ES internal partner as review completed	Draft EA / ES completed		EA / ES public inv. Completed	Final EA / ES completed	Springfield CC approves project	Architect design team selected
															LTD board approves project	Board adopt budget with EmX vehicle debt financing

### LTD Board Roadmap

Item	October	November	December	January	February	March	April	May	June	July	August	September	October	November	December	June, 2005
<b>Payroll Tax Increase</b>		Determine political feasibility - START		Finance Comm. Meets to review new budget scenarios		Staff completes payroll tax implementation options (Diane / Linda II)	Budget Comm. recommends implementation plan (Diane I)	Springfield chamber endorses payroll tax plan				Eugene chamber endorses payroll tax plan				Board approves bond measure
		LC refines capitol options				Cost sharing of health benefits and employees	Board has voted to increase payroll tax?									
<b>Funding Other than Payroll Tax (Linda / Diane)</b>		Job access \$ (Linda / Andy III)	Begin PBI planning	Fed requests identified documents		Lobby trip to DC					Revised CIP		United front results known, Plan "B" commences	Craft GO bond proposal	Finance Comm. approve GO bond measure	
		Lobbyists visit				United front request for balance of EmX construction money									Plan communications campaign	
						LCOG determines voters addresses										
<b>Springfield Station (Ron)</b>	Under construction	Underground work completed	Determine specs for FAC machine	Joint development policy drafted		Order fare machine for Springfield station					Construction completed	Grand opening station				
		Springfield permit obtained														
		ODOT permit obtained														
<b>Ride Source Facility (Stef)</b>		Schematic design completed	Design dev. completed		Final design completed	Invoice to bid issued	Bids opened					Construction completed	Hold grand opening			
		Ride source productivity standardized (Denny III)					Construction contract awarded						Move in to new facility			
						Construction starts										

### LTD Board Roadmap

Item	October	November	December	January	February	March	April	May	June	July	August	September	October	November	December	June, 2005	
<b>Construction / Maintenance (Ron)</b>	Contractor mobilizes	Facilities plan (Charlie III)	Obtain shelter construction contract		Shop construction completed	Solicit bids for RR construction	Contract signed for RR upgrade construction	Begin construction on RR station	Big priority emitter installed on buses			Begin using signal priority					
	Shop equipment relocates	Begin PBI planning	Prepare specs for River Road station upgrade						Begin installation of shelters								
	Cleaning & PM service operations relocate	Solicit bids for shelter construction	Obtains signal priority approval from Eugene						Start construction on Thurston station								
	Mechanic tool box storage relocated																
	Shop construction begins																
<b>AVL / APC / CAD (Mark J.)</b>	Complete vehicle installation (Steve II)	Develop reports (Steve II)	Training ongoing staff (Steve I)	Fully functioning CAD / AVL / APC system	Define productivity standards (Stef III)	Refine processes using data											
		Transit master installation @ GJC (Steve II)	All reporting functions understood and utilized (Larry II)		Use data to improve system performance (Mark III)												
		GSC Training (Steve I)	Install on new artics (Steve I)														
		Verify quality of data (Paul / Larry II)															
		Policy and procedures for using data (Mark J. / Mary II)															
<b>Marketing / Branding / PR (Andy)</b>	Ken, Stef meet with Andy	Assemble PR process team	Complete PR plan draft	LTD joins Cottage Grove and Creswell	Approve PR plan	Complete printing of PR / annual report pieces	Hold first PR forum (breakfast?)					Evaluation of PR effort	Adjust PR program next iteration			Name traditional fixed bus route?	
		Identify PR goals / challenges	Multi-project PR timeline and assignment	PR plan complete (12/03 - 01/04)	Board on rubber-chicken circuit												

## LTD Board Roadmap

Item	October	November	December	January	February	March	April	May	June	July	August	September	October	November	December	June, 2005
<b>Team Environment (Mary)</b>		Team LTD meetings held	Define board role in building "Team LTD"		Supervisor / manager training on team leadership	LC approves customer service initiation	Steering Committee members trained		LC approves customer service plan			Customer service plan begins	Progress implementation on team selected	Operator complaints reduced by 10%		Operator complaints reduced by 25%
		LC develops key messages for Team LTD meetings	Develop "At your service" (Fish) program		Begin team training (Mary III)	Steering committee appointed	Steering Committee designs implementation plan									
		LC refines plan for Team LTD meetings	Succession plan (Mary III)													
<b>Leadership to Community on Transportation (Step)</b>			Board action plan completed			"CATS" approved by City Council					TPC recommends TIP		MPC approves TIP			
<b>Union Contract (Mary)</b>	Mary researches collaboration approach (Mary I)	Board HR Comm. meets (Mary / Ken I)	Propose collaborative style to ATU (Mary III)	Begin collaboration discussions (Mary III)			Agreement in principle	Press release on new contract	New union contract takes effect	Celebration dinner for union contract						
	Mary drafts collaboration agenda (Mary I)	Board approves approach at board retreat (Mary I)	Agreement with union to bargain collaboratively (Mary III)	Sub-group / joint work team / make during negotiation (Team II)			Union contract ratified - vote	Sign well crafted labor contract								
	Mary finds collaborative style bargainer (Mary I)		Communication plan for negotiations (PR person III)	Develop EmX staffing plan (Mary III)												
	LC agrees to bargaining approach (Mary III)															
	Ken & Mary meet with board to pitch agreement (I)															

# *Service Policy*

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## **Objective**

To provide standards for the implementation and evaluation of bus service.

## **Application**

This policy applies to all bus service offered by Lane Transit District, including regular fixed-route service, tripper service, and special events service.

## **Policy**

The policy segment is divided into the following sections:

- A. Definition of Terms
- B. Service Standards:
  - 1. Standards for Productivity
  - 2. Standards for Guest Convenience
  - 3. Standards for Guest Comfort and Safety
  - 4. Standards for Service Reliability
- C. Service Evaluation Procedures
- D. Substandard Service
- E. Implementation/Evaluation of New Service
- F. Service Decision-Making Process
- G. Standards for Tripper Service
- H. Maintenance of Policy

### **A. Definition of Terms**

**Bid:** Bids are held at least three times per year, as defined in the labor agreement with ATU 757, and provide an opportunity to implement service changes. Contract employees select work shifts at this time.

**Block:** See "Schedule."

**Boardings:** A boarding, or unlinked trip, occurs every time a guest boards a bus. Thus, a trip requiring a transfer would count as two boardings.

**Community Events:** Community events are defined both as one-time events (concerts at Autzen Stadium) and annual or repeating events (the Oregon Country Fair and University of Oregon football games).

**Correct Schedule Operation (CSO):** Correct schedule operation is when a bus leaves a timepoint no earlier than the scheduled time and not more than four minutes late.

**Coverage:** Coverage is defined as the percentage of households that are within one-quarter mile of a bus stop.

**Deadhead:** Deadhead refers to bus travel that is not in revenue service, such as travel time to the garage after the bus has completed scheduled service.

**Directional Routes:** Directional routes typically are offered during peak times and are oriented toward commuter travel. Productivity results for directional routes will include a factor for unproductive deadhead time necessary to position these routes for revenue service.

**Duty:** See “Run.”

**Express Service:** Express service significantly reduces travel time for guests compared to regular bus service. Express service typically is offered during peak times and is oriented toward commuter travel. Productivity results for express service will include a factor for unproductive deadhead time necessary to position these routes for revenue service.

**Farebox-to-Operating-Cost Ratio:** The farebox-to-operating-cost ratio measures the percentage of the operating cost paid by guests. It is computed as the total farebox revenue (including sales of passes and tokens) divided by the total operating cost.

**Headway:** Bus headway refers to the amount of time between consecutive buses on a given route. The lower the headway, the more frequent the service.

**Layover Time:** This term identifies time that a bus is not in operation between scheduled revenue service. The typical five-minute pause at the Eugene Station between trips is not considered layover time, but instead is considered part of revenue hours.

**Limited-Stop Service:** Limited-stop service combines fixed-route service and express service to provide neighborhood coverage and reduced travel times. Limited-stop service typically is offered during peak times and is oriented toward commuter travel. Productivity results for limited-stop express service will include a factor for unproductive deadhead time necessary to position these routes for revenue service.

**Line Route:** A line route is defined as a bus route that travels outbound and inbound along the same streets. Line routes differ from loop routes, in that loop routes travel to and from their point of origin using different streets.

**Passenger Trips:** A passenger trip occurs when a guest travels from trip origin to trip destination, regardless of the number of transfers required to complete the trip. Thus, a trip requiring a transfer still only counts as one passenger trip.

**Pay Hours:** Pay hours refers to the number of hours actually paid to the bus operators to provide the service. Overtime is calculated at time and one-half (one hour of overtime is 1.5 hours at regular pay).

**Peak Hour:** The peak-hour period on the system is weekdays between 7:00 a.m. and 9:00 a.m., and between 2:00 p.m. and 6:00 p.m. This is the time when the greatest number of buses is in use and the greatest number of guests is carried.

**Platform Hours:** A platform hour is counted for every hour that a bus operator is with a bus, including deadhead and layover time. This does not include report time or turn-in time.

**Preparatory Time:** This term refers to the time allotted each bus operator to check a bus out from the garage.

**Report Time:** The time an employee is scheduled to report for work.

**Revenue Hours:** A revenue hour is each hour that a bus is in revenue service. This is equivalent to platform hours less deadhead time and layover time.

**Ridership Productivity:** Ridership productivity, as used in this document, is defined as the number of boardings per revenue hour of service. Ridership productivity is defined with different units, such as passenger trips per schedule hour, in other applications.

**Road Call:** A road call occurs when a bus is replaced or repaired during revenue service.

**Run:** A run is the work operated by a bus operator, either full-time or part-time, on a given day. Runs can be either straight (with no unpaid breaks in the workday) or splits, composed of two or more pieces of work that may include paid or unpaid breaks between them.

**Run Cut:** The run cut is the collection of runs developed from a set of schedules. Separate run cuts are developed for weekdays, Saturdays, and Sundays.

**Run Cut Efficiency:** Run cut efficiency measures how efficiently the schedules are divided into runs. It is computed as the percentage of pay hours that are used to provide platform hours. The formula is pay hours minus platform hours divided by platform hours.

**Rural Route:** A rural route is a route that operates, at least in part, outside the Eugene/Springfield urban growth boundary.

**Schedule Efficiency:** Schedule efficiency measures how efficiently the service is written into schedules. It is computed as the percentage of platform hours that actually are in revenue service. The formula is platform hours minus revenue hours divided by platform hours.

**Schedule Hours:** Schedule hours are simply the amount of time on the schedules.

**Timed-meet:** A timed-meet occurs when separate bus routes converge at one point, generally a transit station, and guests make transfers.

**Transfer:** To transfer means to change from one bus to another.

**Tripper:** A tripper is a short-term bus trip that is designed to meet a particular demand.

**Turn-In Time:** This term applies to the time provided every bus operator when the bus is returned to the garage,



**Urban Route:** An urban route is a route that operates entirely within the Eugene/Springfield urban growth boundary. Lane Community College, although just outside the urban growth boundary, is considered within the urban area for the purposes of route identification.

**Route Deviation:** A route deviation involves deviating from the standard bus route to serve a housing, school, or commercial node.

## **B. Service Standards**

### **Productivity Standards**

A route will be considered substandard if it has a ridership productivity of less than 67 percent of the average of other routes within the category, computed separately for weekdays, Saturdays, and Sundays. This standard may apply to productivity during the entire day or to productivity during specific time periods. The following route categories are evaluated:

- ◆ **Urban.** Urban routes are arterial routes that operate from major transit stations.
- ◆ **Express.** Express routes are limited-stop routes that operate in peak direction.
- ◆ **Connector/Shuttle.** Connector/shuttle routes operate within neighborhoods or along designated shuttle routes in the urban core.
- ◆ **Commuter.** Commuter routes are peak-direction routes serving specific school or work locations.
- ◆ **Rural.** Rural routes operate outside the urban growth boundary and provide lifeline service to rural communities within the District.

A segment, or trip, of a route will be considered substandard if it has a ridership productivity of less than 67 percent of the average of all similar segments or trip in the route category. Similar segments are separated between those that are primarily in residential areas and those that are primarily in commercial or industrial areas. This standard applies to the route segment during the entire day or to the segment during a specific time period.

A rural route will be considered substandard if it carries less than an average of 30 boardings per round trip. A specific trip on a rural route will be considered substandard if it carries fewer than 20 boardings.

Route deviations will carry a minimum of 5 boardings per trip and will be scheduled when deviation conditions are met and when schedule time allows.

Route deviations should occur only in order to satisfy one of the following conditions:

1. To serve a major trip generator.
2. To serve an area with a high population of seniors or persons with disabilities.
3. To remedy a significant coverage deficiency.

### **Guest Convenience Standards**

A 60-minute headway is the minimum frequency for all urban routes. This is considered the policy headway.

Headways shorter than the policy headway will be based upon demand for the service. The frequency of a route will not be increased unless the route has a ridership productivity of at least 20 percent above the system average of other routes operating during the same time period, or if the change is necessary to improve transfer connections to other routes, or if improvements in the headway are expected to improve route productivity.

A timed-meet (pulse) system is to be used at the Eugene Station and at other significant regional transit stations.

Route scheduling will take into consideration the following factors:

1. Staggering of routes on major arterials.
2. Minimizing the necessity to transfer.
3. Minimizing transfer time when transfers are necessary.
4. Maintaining consistency and clarity of timetables for guests.
5. Arriving and departing at major destinations in a timely manner (i.e., meeting class schedules at LCC and the UO).

Whenever possible, routing will be direct, using major arterials and neighborhood collector streets to provide the shortest practical travel time between points on a line. When possible, terminal points at both ends of a route should be located at major activity centers to ensure ridership in both directions of operation.

When possible, routes will be structured as two-way line routes. Line routes reduce travel time and are easier for the public to understand. Loops at the end of routes will be used as a turnaround and to provide neighborhood coverage.

The spacing between bus stops in developed areas generally will be approximately two to three city blocks or 1,000 feet. Closer spacing may be implemented in the downtown or other high-density areas. Wider spacing will be considered in less developed areas.

Transit stations will be located in areas with very high numbers of transferring guests or major trip generators. The size of the transit station will be consistent with expected use, operational needs, and the financial capacity of the District.

The District will strive to make all service and associated facilities wheelchair accessible.

### **Comfort and Safety Standards**

The scheduled running time for routes will adequately meet average guest loads and typical traffic congestion, and will include an ample amount of recovery time for each route to compensate for variations in running time and to provide for bus operator restroom breaks.

Additional service may be added if:

- ◆ Guest loads consistently exceed 1.5 times the seated capacity of the vehicle.
- ◆ Guests are consistently not accommodated on a trip due to full guest loads and the next scheduled trip is more than 30 minutes away.

This load standard does not apply to special event service.

If funding is available, bus shelters will be located at bus stops with at least 30 boardings per day, with the priority of installation based on heaviest usage. Bus benches will be located at stops with at least 15 boardings per day. Shelters and benches also may be located at stops that are heavily used by seniors and persons with disabilities, or if there is a significant amount of transfer activity at the stop. Shelters and benches that do not meet the productivity criteria may be installed if the adjacent development subsidizes the cost of the shelter and its installation.

Every bus stop is to have a paved boarding area. This will not be a requirement where curbs and sidewalks do not exist. Streets will not be considered for bus routes unless the street and the associated intersections and traffic controls allow for the safe operation of the bus. LTD's Safety Committee will be consulted whenever a new street is considered for service.

All buses will be cleaned daily, inside and out.

#### **Service Reliability Standards**

Buses will arrive within two minutes of the departure time of connecting buses 95 percent of the time.

Road calls on the system should not occur more frequently than every 10,000 vehicle miles.

The number of missed trips will be less than one-half of one percent of total trips operated.

The average age of the bus fleet will be eight years or less, and no buses older than 20 years will be used in regular route service, unless they have been rehabilitated to acceptable standards.

### **C. Service Evaluation Procedures**

#### **Timing of Changes**

There are at least three bids per year when service changes typically are made. The fall bid coincides with the commencement of classes at area schools. The summer bid coincides with the end of the school year. The winter bid is scheduled at approximately half way between the fall and summer bids.

Major service changes generally will be confined to the fall bid. Minor service changes can be made during the winter and summer bids, and the deletion of school service can occur during the summer bid and during holiday breaks.

An Annual Route Review (ARR) will be conducted every year. Requests for changes or additions to service and other improvements to the system will be considered during the ARR. Approved recommendations from the ARR will be implemented with the fall bid.

A major bus rider survey will be conducted at least every four years. The survey will determine travel behavior, fare payment trends, and guest opinions on service options and guest information.

## **D. Substandard Service**

Substandard service, as defined in Section B, Productivity Standards, will be evaluated as part of the Annual Route Review. The substandard service will be subject to possible elimination or modification. The District may choose to continue to offer service that does not meet productivity standards if the service meets other District objectives.

## **E. Implementation/Evaluation Guidelines for New Service**

New service, as defined in this context, includes the establishment of new routes or the addition of service on existing routes, either through increased frequency or increased span of service. Service hours will be allocated according the following percentages:

1. 75 percent productivity
2. 20 percent coverage
3. 5 percent discretionary

The addition of new service generally will be considered only during the Annual Route Review. Factors to consider in evaluating potential service additions include the following:

1. Financial situation of the District.
2. Expected ridership and ridership productivity, both immediate and long term.
3. Availability of fleet and maintenance capacity.
4. Integration of the service in the District's overall route system.

New service will be operated for a probationary period of at least 18 months without major modification, except in extenuating circumstances. Productivity standards for the performance of new service will be different than the standards for mature service. Following the probationary period, new service will be subject to the same standards as the remainder of the system.

Adequate marketing resources to promote the new service are to be available during the probationary period.

## **F. Service Decision-Making Process**

Recommendations for service changes or the addition of new service will be made by the Development Services Department. The Service Planning and Marketing staff will consult with the Service Advisory Committee and other employees before developing recommendations on significant service changes. Input will be collected from current guests and potential guests through public outreach processes.

The Leadership Council will review and approve all recommendations for significant service changes or additions.

The Leadership Council will determine which service changes are to be presented to the Board of Directors for approval. Any change that affects 25 percent of the service miles on a route, or 25 percent of the trips on a route, or the establishment of a new route, must go to the Board of Directors for approval. A service presentation will be made to the Board of Directors each December or January. This will be followed by public hearings in February

and March. The Board of Directors will approve the ARR service package at the March Board of Directors meeting.

If financial constraints or other problems require that reductions in service that are not substandard be implemented, the elimination of service will be based upon the following factors:

- ◆ The productivity of the service (boardings per revenue hour, cost per boarding).
- ◆ The availability of alternate bus service in the area.
- ◆ Ridership by seniors and persons with disabilities or others with limited transportation alternatives.
- ◆ The cost effectiveness of the service cut.

### **G. Standards for Tripper Service**

The following criteria are to be used in determining whether to offer tripper service:

- ◆ Trips cannot be adequately provided by existing service, or there is not enough capacity within the existing service.
- ◆ There are no budgetary or fleet constraints that would preclude the addition of the tripper.

Trippers will be evaluated weekly and discontinued when no longer needed. If the demand continues, the tripper will be added as regular service and included in the next available run cut.

### **H. Maintenance of the Service Policy**

The Service Planning and Marketing Manager is responsible for maintaining this policy and recommending changes to the policy as necessary.

Board Approval of Revisions: 6/16/99  
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