



Lane Transit District
P. O. Box 7070
Eugene, Oregon 97401
(541) 682-6100
Fax: (541) 682-6111

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2005 LTD BOARD OF DIRECTORS STRATEGIC PLANNING WORK SESSION

April 14-15, 2005

Lane Transit District Board Room

3500 E. 17th Avenue, Eugene (off Glenwood Blvd.)

No public testimony will be heard at this meeting.

AGENDA

| | | <u>Page No.</u> |
|---------------------------|---|-------------------------------|
| Day One – April 14 | | |
| 4:00 p.m. | <u>Opening Remarks</u> <ul style="list-style-type: none">• Welcome• Agenda Overview | Gerry Gaydos Ken Hamm |
| 4:15 p.m. | <u>LTD Service</u> <ul style="list-style-type: none">• Service Design Options• Current Service• Future Service• Comparison to Other Systems• Productivity vs. Coverage• Productivity Standards• Current Needs vs. Planning for the Future• Special Event Service (Oregon Country Fair) | Stefano Viggiano, Andy Vobora |
| 6:00 p.m. | <u>Dinner</u> | |
| 6:10 p.m. | <u>Service (continued)</u> | |
| 7:00 p.m. | <u>Labor Negotiations Debrief</u> | Mary Neidig |
| 8:30 p.m. | <u>Adjourn to April 15, 2004, 3:00 p.m., at LTD</u> | |
| Day Two – April 15 | | |
| 3:00 p.m. | <u>Strategic Plan Update</u> | Ken Hamm, Stefano Viggiano |
| 4:00 p.m. | <u>Long-Range Financial Plan</u> | Diane Hellekson |
| 6:00 p.m. | <u>Dinner</u> | |
| 6:10 p.m. | <u>LTD Board Organization</u> <ul style="list-style-type: none">• Training• Use of Committees | Gerry Gaydos |
| 7:15 p.m. | <u>Wrap-up</u> | Gerry Gaydos, Ken Hamm |
| 7:30 p.m. | <u>Adjourn</u> | |

WORK SESSION AGENDA ITEM SUMMARY

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- DATE OF MEETING:** April 15, 2005
- ITEM TITLE:** LONG-RANGE FINANCIAL PLAN REVISION
- PREPARED BY:** Diane Hellekson, Director of Finance & Information Technology
- ACTION REQUESTED:** Staff Direction
- BACKGROUND:** At the Board work session on April 15, 2005, participants will consider four different scenarios for the revised long-range financial plan. The four versions will differ only in the payroll tax rate assumption used:
- Version 1 assumes that the payroll tax rate will increase by .02 percent on January 1, 2006.
 - Version 2 assumes that the tax rate will increase by .01 percent on January 1, 2006.
 - Version 3 assumes the rate will increase by .02 percent on January 1, 2007.
 - Version 4 assumes that the rate will not increase in the next eight years.
- All other annual growth assumptions are indicated between the columns for each year. For purposes of easier tracking, fuel now has its own line in the plan.
- RESULTS OF RECOMMENDED ACTION:** The preferred version of the revised Long-Range Financial Plan will be brought to the Board for discussion and approval at the regular meeting on May 18, 2005. The first year of the revised LRFP will become the FY 2005-06 Proposed Budget.
- ATTACHMENTS:** Long-Range Financial Plan Version 1
Long-Range Financial Plan Version 2
Long-Range Financial Plan Version 3
Long-Range Financial Plan Version 4
- PROPOSED MOTION:** None

AGENDA ITEM SUMMARY

DATE OF MEETING: April 14, 2005

ITEM TITLE: LABOR NEGOTIATIONS DEBRIEF

PREPARED BY: Mary Neidig, Director of Human Resources and Risk Management

ACTION REQUESTED: None

BACKGROUND: Lane Transit District and the Amalgamated Transit Union reached agreement on a new labor contract on March 12, 2005. It was ratified by the membership on March 13 and approved by the Board of Directors on March 14. This agreement was the result of a negotiations process that spanned nearly a year, and contained a one-week strike. The Board of Directors has asked for an opportunity to debrief the process that occurred.

ATTACHMENT: None

PROPOSED MOTION: None

AGENDA ITEM SUMMARY

DATE OF MEETING: April 14, 2005

ITEM TITLE: BOARD ORGANIZATION DISCUSSION

PREPARED BY: Ken Hamm, General Manager

ACTION REQUESTED: None. Discussion only.

BACKGROUND: Over the course of the past year, the Board has talked about a number of items that fall under Board organization, governance, roles and responsibilities, etc. This time on the agenda was allotted for Board discussion on any related items you wish. Items that the general manager has heard queries about include:

1. Whether to have subcommittees of the Board or not
2. The Board's level of involvement in the community
3. Governance...what decisions come from the Board, which from staff?
4. Legislative involvement for the Board
5. Training opportunities for Board members

ATTACHMENTS: Previous Committee Reference Materials

Corridor Ridership Analysis Percent of Route Ridership on Main Corridor

| Route | Corridor End Location | Average Passenger Activities Per Weekday Trip * | | | |
|--------------------|-----------------------------|---|------------|--------------|------------|
| | | Corridor | Percent | Neigh. | Percent |
| #11 Thurston | Thurston Station | 96.4 | 91% | 9.8 | 9% |
| #13 Centennial | 18th & Centennial | 72.6 | 89% | 9.0 | 11% |
| #24 Willamette | 40th & Donald | 47.2 | 83% | 9.8 | 17% |
| #25 Amazon | 30th & Hilyard | 50.7 | 83% | 10.0 | 17% |
| #30 Bertelsen | Excludes Oak P. & Bertelsen | 71.1 | 92% | 6.5 | 8% |
| #41 Barger | Beltline and Barger | 61.0 | 86% | 10.3 | 14% |
| #42/43 (11th/13th) | 11th & Bertelsen | 61.7 | 93% | 4.6 | 7% |
| #42/43 (Hwy. 99) | Excludes EH, Taney/Royal | 59.5 | 78% | 17.1 | 22% |
| #51 Santa Clara | River Road Station | 60.0 | 80% | 15.2 | 20% |
| #52 Irving | River Road Station | 70.7 | 84% | 13.3 | 16% |
| #66/67 Coburg | Coburg and Crescent | 72.0 | 85% | 13.1 | 15% |
| #82 LCC | LCC | 71.2 | 100% | 0.0 | 0% |
| TOTALS | | 794.1 | 87% | 118.7 | 13% |

DATA from Winter 1999 APC

* Boardings and deboardings past the corridor end are assigned to neighborhood. Others are assigned to the corridor.

**2005 LTD BOARD OF DIRECTORS
STRATEGIC PLANNING WORK SESSION
April 14-15, 2005**

LTD SERVICE

**2005 LTD BOARD OF DIRECTORS
STRATEGIC PLANNING WORK SESSION
April 14-15, 2005**

LABOR NEGOTIATIONS DEBRIEF

**2005 LTD BOARD OF DIRECTORS
STRATEGIC PLANNING WORK SESSION
April 14-15, 2005**

STRATEGIC PLAN UPDATE

**2005 LTD BOARD OF DIRECTORS
STRATEGIC PLANNING WORK SESSION
April 14-15, 2005**

LONG-RANGE FINANCIAL PLAN

**2005 LTD BOARD OF DIRECTORS
STRATEGIC PLANNING WORK SESSION
April 14-15, 2005**

LTD BOARD ORGANIZATION

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 Strategic Plan

2005

Draft: 1/21/05

INTRODUCTION

In 2003, the Board of Directors of Lane Transit District (LTD) adopted a Strategic Plan that was developed through a comprehensive plan development process. The District's vision, mission statement, core values, and guiding principles were established in 2001 and were used for the 2003 Plan. The 2003 Strategic Plan established five goal statements that support the District's Mission Statement. The plan included both short-term strategies and long-term strategies designed to support the five goals.

The Board's goal is to have a dynamic plan that was closely tied to the District's short-range financial plan and provides a strategic direction for the organization. In order to keep the plan current and dynamic, it must be updated at regular intervals. This update should be considered a "minor" update. There is no change in the vision, mission statement, guiding principles, and the five goal statements. There is a suggested change in one of the core values. The only other changes are in the short-term and long-term strategies.

LANE TRANSIT DISTRICT VISION

To be the best transit system in North America.

LANE TRANSIT DISTRICT MISSION

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

- ❖ **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.
- ❖ **COMMITMENT** – *We are dedicated to our important mission.*

LANE TRANSIT DISTRICT GUIDING PRINCIPLES

- ❖ **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.

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

LANE TRANSIT DISTRICT STRATEGIC PLAN GOALS

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 |
|---|-----------------|
| <i>Maintain or increase the existing fixed-route service level</i> | High |
| Use APC data to provide route segment and stop-level analysis | High |
| Improve the efficiency of the fixed-route system | High |
| Maintain a plan to optimize the fleet composition consistent with LTD's service goal | High |
| Pursue signal priority to service outside of BRT, <i>as part of a Progressive Corridor Enhancement effort</i> | High |
| Maintain special events service | High |
| Develop a staff training plan for technology implementation | Medium |
| Develop and implement a facility plan | Medium |
| Develop RideSource Efficiency & Productivity Standards | Medium |
| Review and refine LTD's productivity goals and standards | Medium |
| Pursue additional funding for service (e.g., job access and reverse commute travel needs) | Medium |

Long-Term Implementation Strategies:

- Maintain a plan to optimize the fleet composition consistent with LTD's service goal
- Pursue signal priority to service outside BRT as part of a Progressive Corridor Enhancement effort
- 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 |
|--|----------|
| Implement the Franklin EmX Corridor <ul style="list-style-type: none"> • Complete the EmX Franklin Corridor construction • Complete the acquisition of an appropriate EmX vehicle • Develop a real-time passenger information system • Develop a preventive and corrective maintenance plan for EmX • Develop and implement a public relations and marketing plan for EmX service introduction • Collect baseline data for the EmX Franklin Corridor prior to service implementation • Develop an EmX Franklin Corridor staffing/operational plan | High |
| Pursue joint development options for the Springfield Station | High |
| Develop seamless system integration with EmX | High |
| Obtain all environmental and political approvals for the Pioneer Parkway EmX Corridor | High |
| <i>Complete a corridor with Level 2 Progressive Corridor Enhancement every two years</i> | High |
| Support nodal development and transit-oriented land uses | High |
| Integrate transit planning with land use efforts and planning for other transportation modes | High |
| Track TransPlan Performance Measures for transportation demand management (TDM) and transit | Medium |
| Pursue real-time passenger information to service outside of EmX | Medium |
| Implement independent telephone services | Low |

Long-Term Implementation Strategies:

- *Construct a complete EmX corridor every six years.*
- *Implement Progressive Corridor Enhancements as dictated by funding availability*
- Reshape the service system with EmX system expansion
- Transition to clean, alternative fuel technology for all the fleet, *consistent with LTD policy*
- 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:

| Strategy | Priority |
|--|-----------------|
| Maintain a viable Long-Range Financial Plan and Capital Improvements Program (CIP) | High |
| Pursue federal funding for capital projects, including EmX system build-out | High |
| Pursue established and new sources for federal, state, and local funding | High |
| <i>Pursue the use of state lottery funds for local match for the Pioneer Parkway EmX corridor construction</i> | High |
| <i>Implement the payroll tax increase authorized by the State Legislature in 2003</i> | High |
| <i>Adjust fares to keep pace with inflation</i> | High |
| Negotiate an appropriate labor contract | High |

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 *eight-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
- *Complete the ten-year implementation of the payroll tax increase authorized by the legislature in 2003*

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)
- *Include standards that relate to New Starts?*

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 |
|--|----------|
| Provide community leadership in developing multi-modal transportation solutions <ul style="list-style-type: none"> • Provide consistent leadership and participation at Metropolitan Policy Committee (MPC) meetings • Utilize all available forums for LTD participation in community transportation planning (e.g., Region 2050) | High |
| Strengthen LTD's partnerships with government agencies <ul style="list-style-type: none"> • Federal Transit Administration (FTA) Region X • State and local governments, ODOT • Legislative agenda | High |
| <i>Grow</i> the visibility of LTD Board members in the community | High |
| <i>Maintain</i> LTD's profile/involvement in community activities | High |
| <i>Continue</i> effective participation in long-range land use and transportation planning | High |
| Build new partnerships/allies in the FTA D.C. office and congressional staff offices | High |
| Optimize coordinated investment strategies that benefit transit (including local STP programming) | High |
| Take a leadership role in implementing TDM strategies | Medium |
| Conduct annual or biennial Board self-evaluations based on strategic planning goals | Medium |

Long-Term Implementation Strategies:

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

Performance Measures:

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

DRAFT

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:

| Strategy | Priority |
|--|-----------------|
| Support an active and viable Employee Council | High |
| Maintain a positive relationship with ATU | High |
| <i>Implement a program to enhance employee morale and commitment to the organization</i> | High |
| Create a dynamic internal communication process | High |
| Develop a comprehensive employee development program | Low |
| Develop an organizational succession plan | Low |

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 employee morale*

Performance Measures:

- Percentage of “negative” (unwanted) employee turnover
 - Good to excellent rating on employee scorecard
 - Measure of formal grievances and arbitration
-

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 |
|-----------------------------------|---|---|---|--|--|-----------------------------------|---|-------------------------------------|------|--|-------------------------|--------------------------|-------------------------------|-------------------------|---------------------------------|--|
| Leadership Council (Ken) | 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 | | | | | | | | | | | | | | | |
| EmX Franklin (Mark P.) | | 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) | | | | | | | | | |
| EmX Coburg Road (Stef) | 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) |
| EmX Pioneer Parkway (Stef) | 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 | |
|---|--------------------|---|---------------------------------|--|------------------------|---|---|---|------|------|------------------------|--|--|------------------------|---------------------------------------|------------|-----------------------------|
| Payroll Tax Increase | | 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? | | | | | | | | | | |
| Funding Other than Payroll Tax (Linda / Diane) | | 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 | | | | | | | | | | | |
| Springfield Station (Ron) | 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 | | | | | | | | | | | | | | | |
| Ride Source Facility (Stef) | | 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

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|---|---|--|--|--|---|--|---|----------------------------------|---|------|--------|-----------------------------|----------------------------------|----------|----------|-----------------------------------|
| Construction / Maintenance (Ron) | 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 | | | | | | | | | | | | | | | |
| AVL / APC / CAD (Mark J.) | 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) | | | | | | | | | | | | | | |
| Marketing / Branding / PR (Andy) | 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

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|---|---|---|--|---|--|---|--|----------------------------------|-----------------------------------|---------------------------------------|--------------------|------------------------------|--|------------------------------------|----------|------------------------------------|
| Team Environment (Mary) | | 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) | | | | | | | | | | | | | |
| Leadership to Community on Transportation (Step) | | | Board action plan completed | | | "CATS" approved by City Council | | | | | TPC recommends TIP | | MPC approves TIP | | | |
| Union Contract (Mary) | 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

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.

Trippler: 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
Revised: 11/23/04

AGENDA ITEM SUMMARY

- DATE OF MEETING:** April 14, 2005
- ITEM TITLE:** BOARD STRATEGIC PLANNING WORK SESSION—SERVICE DISCUSSION
- PREPARED BY:** Stefano Viggiano, Director of Development Services
- ACTION REQUESTED:** None. Discussion only.
- BACKGROUND:** The first item on the agenda for the Board Strategic Planning Work Session is a discussion of service issues. The discussion is intended to cover the following items:
1. Information on the various service designs that are used by transit systems, the advantages and disadvantages of each, and their potential applicability to the LTD system.
 2. A description of the current and planned LTD system design.
 3. LTD performance measures and operating characteristics compared with other similarly-sized transit systems.
 4. A review of the current LTD Service Policy.
 5. Coverage vs. Productivity: A discussion of the allocation of service between routes that are intended to provide “coverage” (access), and those that are focused on “productivity” (high ridership).
 6. Productivity Standards: Are LTD’s current standards for defining substandard service appropriate?
 7. Current Service vs. Future Needs: Resources must be allocated to both provide for current service needs and to improve the system for the future. A key policy question for the Board is the balance of allocation of resources between these two needs.
 8. Special Event Service: Is the District’s current policy to charge special events the fully-allocated cost for service appropriate?
- ATTACHMENTS:**
1. LTD Peer Group Comparison of Operating Characteristics – FY 2003-04
 2. LTD Service Policy
 3. Route Characteristics by Service Type
 4. Corridor Ridership

AGENDA ITEM SUMMARY

DATE OF MEETING: April 15, 2005

ITEM TITLE: BOARD STRATEGIC PLANNING WORK SESSION—STRATEGIC PLAN UPDATE

PREPARED BY: Ken Hamm, General Manager

ACTION REQUESTED: None. Discussion only.

BACKGROUND: In 2003, the Board of Directors of Lane Transit District (LTD) adopted a Strategic Plan that was developed through a comprehensive plan development process. The District's vision, mission statement, core values, and guiding principles were established in 2001 and were used for the 2003 Plan. The 2003 Strategic Plan established five goal statements that support the District's Mission Statement. The plan included both short-term strategies and long-term strategies designed to support the five goals.

The Board's goal was to have a dynamic plan that was closely tied to the District's short-range financial plan and provides a strategic direction for the organization. In order to keep the plan current and dynamic, it must be updated at regular intervals. This update should be considered a "minor" update. There is no change in the vision, mission statement, guiding principles, and the five goal statements. There is a suggested change in one of the core values. The only other changes are in the short-term and long-term strategies.

ATTACHMENT: 2005 Draft Strategic Plan

**Status of
Strategic Plan Goals
April 14, 2005**

LANE TRANSIT DISTRICT STRATEGIC PLAN GOALS

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 AVL/APC/CAD project within 12 months | Nondisc | Done |
| Use APC data to provide route segment and stop level analysis | Nondisc | Ongoing |
| Develop RideSource Efficiency & Productivity Standards | Nondisc | Ongoing |
| Construct RideSource facility | Nondisc | Done |
| Develop staff training plan for technology implementation | Nondisc | Ongoing |
| Develop and implement a facility plan | Nondisc | Ongoing |
| Improve efficiency of fixed-route system | Nondisc | Ongoing |
| Expand plan to optimize fleet composition consistent with our service goal | Nondisc | Ongoing |
| Maintain service level at current level for FY 2003-04 | Nondisc | Done |
| Maintain special events service | Nondisc | Ongoing |
| Review and refine productivity goals and standards | High | Ongoing |
| Pursue signal priority to service outside of BRT | High | Ongoing |

Long-Term Implementation Strategies:

- Update plan that optimizes fleet composition consistent with our service goal
- Pursue signal priority to service outside of BRT

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 BRT <ul style="list-style-type: none"> • Complete BRT Phase 1 • Complete acquisition of appropriate BRT vehicle • Develop real-time passenger information system • Develop and implement fare collection for BRT • Develop a preventive and corrective maintenance plan for BRT • Develop and implement a public relations and marketing plan for BRT construction and service introduction • Collect baseline data for BRT Phase 1 prior to service implementation | Nondisc | Ongoing Ongoing Ongoing Ongoing On Hold Ongoing Ongoing Ongoing |
| Complete construction of Springfield Station within specified timeline | Nondisc | Done |
| Complete expansion of the Maintenance building within specified timeline | Nondisc | Done |
| Pursue joint development options for Springfield Station within specified timeline | Nondisc | Ongoing |
| Develop seamless system integration with BRT | Nondisc | Ongoing |
| Support nodal development and transit-oriented land uses | Nondisc | Ongoing |
| Integrate transit planning with nodal development and other metropolitan planning | Nondisc | Ongoing |
| Track TransPlan Performance Measures for TDM and transit | Nondisc | Ongoing |
| Integrate transit planning with planning for other transportation modes | Nondisc | Ongoing |
| Develop a policy framework for joint development | Nondisc | Done |
| Obtain all environmental and political approvals for Pioneer Parkway BRT Corridor | High | Ongoing |
| Obtain all environmental and political approvals for next Eugene BRT Corridor | Medium | On Hold |
| Pursue real-time passenger information to service outside of BRT | Low | Ongoing |
| Implement independent telephone services | Low | On Hold |

Long-Term Implementation Strategies:

- Expand the BRT system with additional corridors
- Reshape service system with BRT system expansion
- Pursue real-time passenger information to service outside of BRT
- Transition to hybrid-electric or fuel cell 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:

| Strategy | Priority | Status |
|--|-----------------|---------------|
| Complete debt financing for vehicles | Nondisc | No Need |
| Maintain viable Long-Range Financial Plan and Capital Improvements Program (CIP) | Nondisc | Ongoing |
| Pursue federal funding for capital projects, including BRT system build-out | High | Ongoing |
| Pursue established and new sources for state and local funding | High | Ongoing |

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 five-year window of a 20-year LRFP
- Continue debt-financing of vehicles and capital projects
- Continue advocating for regional coordinated investment strategy to maximize benefit of state and federal dollars coming into 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"> • Maximize opportunities and relationships created through TMA transition • Provide consistent leadership and participation at Metropolitan Policy Committee • Utilize all available forums for LTD participation in community transportation planning (e.g., Region 2050, Eugene’s Downtown to the River, etc.) | Nondisc | Ongoing Ongoing Ongoing Ongoing |
| Strengthen partnerships with government agencies <ul style="list-style-type: none"> • FTA Region X • State and local governments, ODOT • Legislative agenda (payroll tax, etc.) | Nondisc | Ongoing Ongoing Ongoing Ongoing |
| Create a more visible role for Board in the community | Nondisc | Ongoing |
| Increase LTD profile/involvement in community activities | Nondisc | Ongoing |
| Increase effective participation in long-range land use and transportation planning | Nondisc | Ongoing |
| Build new partnerships/allies in FTA D.C. office and congressional staff offices | Nondisc | Ongoing |
| Optimize coordinated investment strategies that benefit transit (including local STP programming) | High | Ongoing |
| Take leadership role in implementing TDM strategies | Medium | Ongoing |
| Conduct annual or bi-annual Board self-evaluation based on strategic planning goals | Medium | Not done |
| Conduct community attitude and awareness survey | Low | Done |

Long-Term Implementation Strategies:

- Develop knowledge of transit benefits through school education programs
- Continue to increase Board profile in the community
- Conduct a community-wide market research survey
- Address changing demographics of 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:

| Strategy | Priority | Status |
|--|-----------------|---------------|
| Negotiate an appropriate labor contract | Nondisc | Done |
| Support an active and viable Employee Council | Nondisc | Ongoing |
| Build a positive relationship with ATU | Nondisc | Ongoing |
| Define and build TEAM LTD, with the inclusion of the Board of Directors in the TEAM building process | High | Ongoing |
| Create a dynamic communications and input process | High | Ongoing |
| Develop a comprehensive employee development program | Low | Unfunded |

Long-Term Implementation Strategies:

- Implement dynamic communications process
- Implement 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

LTD Peer Group Comparison of Operating Characteristics FY 2003-04

| System | Population | Service hours | Annual boardings | Fare revenue | Peak buses | Total employees | Operating budget | Capital Bud. (Avg per Yr) | Capital bud. % of Oper. | Serv Hrs per Capita | Boardings per Capita | Serv Hrs per Emp | Cost per Boarding | Fare Recovery | Cost per Serv Hr | Boardings per Serv Hr |
|-----------------------|------------------|------------------|-------------------|---------------------|------------|-----------------|----------------------|---------------------------|-------------------------|---------------------|----------------------|------------------|-------------------|---------------|------------------|-----------------------|
| Ann Arbor, MI | 204,530 | 181,060 | 4,188,023 | \$2,719,956 | 56 | 170 | \$17,014,216 | \$2,972,200 | 17% | 0.89 | 20 | 1065 | \$4.06 | 16% | \$93.97 | 23.1 |
| Bakersfield, CA | 397,672 | 275,084 | 6,915,502 | \$3,600,000 | 65 | 234 | \$16,000,000 | \$5,440,000 | 34% | 0.69 | 17 | 1176 | \$2.31 | 23% | \$58.16 | 25.1 |
| Bellingham, WA | 174,365 | 91,798 | 2,853,050 | \$1,235,000 | 33 | 80 | \$4,694,728 | \$624,600 | 13% | 0.53 | 16 | 1147 | \$1.65 | 26% | \$51.14 | 31.1 |
| Colorado Spr., CO | 225,000 | 135,300 | 2,580,000 | \$1,600,000 | 47 | 138 | \$8,600,000 | \$7,000,000 | 81% | 0.60 | 11 | 980 | \$3.33 | 19% | \$63.56 | 19.1 |
| Fort Collins, CO | 120,000 | 60,909 | 1,300,000 | \$807,038 | 18 | 67 | \$4,808,419 | \$1,340,268 | 28% | 0.51 | 11 | 916 | \$3.70 | 17% | \$78.94 | 21.3 |
| Livermore, CA | 166,972 | 122,909 | 1,936,304 | \$1,708,543 | 49 | 165 | \$9,333,235 | \$7,000,000 | 75% | 0.74 | 12 | 745 | \$4.82 | 18% | \$75.94 | 15.8 |
| Olympia, WA | 136,640 | 136,681 | 2,770,715 | \$1,422,475 | 44 | 147 | \$10,512,780 | \$993,940 | 9% | 1.00 | 20 | 930 | \$3.79 | 14% | \$76.91 | 20.3 |
| Reno, NV | 253,000 | 251,052 | 7,528,805 | \$5,967,179 | 60 | 272 | \$18,999,182 | \$3,398,938 | 18% | 0.99 | 30 | 923 | \$2.52 | 31% | \$75.68 | 30.0 |
| Salem, OR | 210,000 | 168,541 | 5,500,000 | \$1,900,000 | 60 | 221 | \$17,300,000 | \$3,706,000 | 21% | 0.80 | 26 | 763 | \$3.15 | 11% | \$102.65 | 32.6 |
| Santa Cruz, CA | 255,602 | 233,389 | 5,819,450 | \$6,708,329 | 82 | 296 | \$29,793,815 | \$4,600,000 | 15% | 0.91 | 23 | 788 | \$5.12 | 23% | \$127.66 | 24.9 |
| Vancouver, WA | 365,000 | 245,000 | 6,700,000 | \$3,900,000 | 86 | 254 | \$20,900,000 | \$6,240,000 | 30% | 0.67 | 18 | 965 | \$3.12 | 19% | \$85.31 | 27.3 |
| Mean (average) | 228,071 | 172,884 | 4,371,986 | \$2,869,865 | 55 | 186 | \$14,359,670 | \$3,937,813 | 27% | 0.76 | 19 | 945 | \$3.42 | 20% | \$80.90 | 24.6 |
| Lane Transit | 270,000 | 315,936 | 8,207,818 | \$4,435,613 | 88 | 313 | \$23,389,618 | \$6,091,037 | 26% | 1.17 | 30 | 1009 | \$2.85 | 19% | \$74.03 | 26.0 |
| TriMet | 1,522,400 | 1,698,492 | 91,071,600 | \$54,978,700 | 547 | 2,479 | \$233,710,000 | | 0% | 1.12 | 60 | 685 | \$2.57 | 24% | \$137.60 | 53.6 |

Summary of Comments Board Work Session

April 14 and 15, 2005

A. Data on Comparison of Different Transit Systems

- a. Establish a system to grade categories of LTD productivity compared with other systems. (Numeric grade, a,b,c, etc.)
- b. Consolidate comparisons into document that has fewer numbers, easier to understand.
- c. Create list of frequently asked questions (FAQ) and common responses to those questions for the Board. Examples: how does fare recovery impact efficiency; why doesn't the passenger pay more of the cost; how to reduce costs of operation. People frequently criticize LTD for providing public restrooms. We should survey restroom usage at both Springfield and Eugene stations to justify costs.

B. Establishment of service standards

- a. Standards for people who use mobility devices: Consider improvement to corridors with high wheelchair usage. High platform, access, capacity on bus.
- b. How about green standards: fuel, noise.
- c. Relative productivity standard of 67 percent opens the question of what is appropriate; it creates useful dialogue. Board wants to be involved in service decision.
- d. Current process creates anxiety on certain routes. Could work by putting certain routes "on notice or probation." Create incentives for a neighborhood to work together to improve productivity.
- e. Do not lock LTD into specific commitment on coverage/productivity, so LTD can respond to demand issues.
- f. Rural routes are more about coverage than productivity, so maybe coverage can be measured as higher than 25 percent. Look at where the split is now, productivity/coverage, and then realize that it might shift plus 5 percent.
- g. We should look for ways to find 5 percent to respond to changing demands, because we do not have 5 percent.
- h. Bring back five-year service demand model to the Board. Distribution of service, rural/urban, etc. What will the increasing cost of oil do to driving demand for bus service? How to anticipate and respond to growing demands.
- i. Should this be a policy question that is driven by regional policy, RTP, 2050, etc., or is this exclusively a Board decision? Should we ask city councils' what they believe the split should be? How to inform and/or involve City in service decision process.

C. Special Services

- a. Oregon Country Fair (OCF) - look at opportunities to generate money through underwriting partnerships.

- b. Review policy for pricing special service. *May Board meeting.*

D. Labor Negotiation Debrief

- a. There is a phrase being used that could apply to decisions that impact LTD employees, “Nothing about me without me,” meaning that as we discuss policy issues that affect employees, employees should be part of that discussion.
- b. There is a need to build community at LTD. Have Board participation on “building LTD community” committee. What are the restraints on Board activities and interaction with union members?
- c. Honor and respect all participants.
- d. Need to examine all our relationships and avoid “Us vs. Them” mentality.
- e. How can we create ways to cooperate? Approach decision making locally to build trust.
- f. Board will be accountable for its policies and actions.
- g. Have educated, dispassionate, hard-nosed negotiation.
- h. Build positive expectation for outcomes.
- i. Find out what other unions are doing successfully to address the increase in medical benefits costs.
- j. Find ways to educate union on budget.
- k. How to involve Board with getting to know union.
- l. Find a way to assess ahead of time the sentiment of a majority of the union membership.
- m. What is the role of the Board in future negotiations, and what is the consequence of that role? Must educate union on Board role.
- n. Find a successful way to discuss and change work rules.
- o. Find a way to be proactive between now and the next negotiations in terms of PR and educating the public on relevant labor issues.

E. Strategic plan

- a. Include organization in reviewing mission, vision, and core values. Review terms used: Guests, corridor, and choice rider.
- b. Board needs to keep track of alternative fuel and propulsion systems. Look at pilot projects. “Keep track of innovation in all areas.”
- c. Progressive Corridor Enhancement (PCE) should not be limited to just one corridor or just signal priority. LTD needs to be opportunistic in effectively installing improvements as possibilities arise.
- d. Do we need to change name of PCE; e.g., incremental (progressive) corridor enhancement – ICE.
- e. Highlight TDM role and LTD’s involvement in TDM. Include TDM in strategic plan.
- f. Go slower on full-blown corridor-by-corridor BRT development. Focus instead on enhancements throughout the system. Technology is not yet proven and success of BRT has not been proven in U.S. Complete the Franklin Corridor and then test results.

- g. Most transit occurs on corridors so transit enhancements will have to occur on corridors.
- h. How and when does LTD initiate a conversation with Eugene on the next BRT corridor in Eugene? LTD should bring issue to regional planning bodies (LCOG, MPC, 2050) on where a complete BRT corridor is needed most. Six-year timeline is a concern. Find right language to move BRT agenda, politics, and funding.
- i. Move clean fuel technology to the "Leadership Strategy" from "Innovative Service Strategy."
- j. LTD needs to be sensitive to the level of fares and rate of increase relative to inflation, average income of riders, and community perceptions. Hold a work session in the near future on fares.
- k. Rework terms and language of "Team Environment" strategy. Communicate to organization that the Board is interested in Board organizational involvement in re-working this strategy.

F. Payroll Tax increase

- a. Issue of political will and impact of increase at this time.
- b. Timing 2007 – Earlier is seen as paying for health benefits costs and BRT. Need to talk to the two Chambers more about an increase.
- c. Repetitive annual increase may create a new political opposition to payroll tax.
- d. Use the next year to actively sell a tax increase in 2007 to the business community. Begin outreach efforts immediately.
- e. Approve tax increase ordinances before December 2005.
- f. Annual Increase

| | <u>YEAR</u> | <u>AMT</u> |
|----|-------------|------------|
| 1. | 2007: | .0002 |
| 2. | 2008: | .0002 |
| 3. | 2009 | .0001 |
| 4. | 2010: | .0001 |
| 5. | 2011: | .0001 |
| 6. | 2012: | .0001 |
| 7. | 2013: | .0001 |
| 8. | 2014: | .0001 |

- g. Discuss reserve policy soon. Need to have a clear understanding of how much is necessary for reserves. Three million dollars has been enough. If reserves drop below \$3 million, then we need to document why, when, and for how long, and state how they can be rebuilt. Reserve policy needs to be flexible.
- h. Continued development of Pioneer Parkway EmX (PP EmX) is a critical cost decision that in turn drives a number of key issues and financial decisions, such as transfers to capital fund, stability of operational reserves, ability to maintain or increase service levels, ability to respond to unanticipated financial crisis. PP EmX expenditures put pressure on a number of other key LTD services.

- i. Would prefer not to use debt financing for capital expenditures, but Board should consider the option.
- j. All of these financial decisions are relative to the current circumstances and future considerations. Need to be flexible. Cannot bind future Boards.

G. To Do – Board Operations

- a. Should Board resume the use of committees to conduct business?
 - 1. HR, Finance, Service committees
- b. Staff should comment and recommend on value of Board committees: Staffing issues, efficiencies, pros and cons (Finance committee, HR committee). Talk about what committees could be formed, changes to committees, issues to be heard by committees. *May 2005 Board meeting.*

Frequently Asked Questions
April 30, 2020

1. Financial
 - a. Why payroll tax?
 - b. How is rate set?
 - c. Why raise rate now?
 - d. How is the operations of LTD funded?
2. Operations
 - a. Why are the buses always empty?
 - b. Why doesn't LTD run small buses and save money?
 - c. Why doesn't LTD pull out of traffic when it stops instead of backing up traffic on the street?
 - d. How does LTD decide where to put bus stops and shelters.
 - e. I live in a new neighborhood without service. How do I get bus service in my neighborhood?
 - f. Why and how does LTD decide to cut service?
 - g. Why is LTD spending so much money to put restrooms in its stations.
3. Capital expenditures
 - a. Why is LTD spending so much money to build BRT?
 - b. Why doesn't LTD spend more money on shelters and service instead of capital projects?
 - c. How much does LTD spend each year for capital and what does that money buy?
 - d. How did LTD make such a terrible mistake on the AVS vehicles?
4. Fares
 - a. How much of the operational cost of LTD is paid by fares and why doesn't LTD charge more?
 - b. How does LTD decide what to charge for fares and how often does LTD raise fares?
 - c. My friend works for a company that gives her a bus pass, how do I get one?

TAXES, REVENUES, AND GOVERNANCE

LTD AND QUESTIONS AND ANSWERS
0; Why does the business community alone LTD? Why can't LTD just operate more efficiently so that it can turn at a profit and not need tax support?

LTD and other transit systems require public subsidies so that they can provide viable competition for the automobile, which is not the most expensive but also the most heavily publicly-financed transportation mode in our society.

Several studies have shown that gasoline taxes and direct user fees only cover a small portion of the actual costs of car use. ' Police accidents, insurance, road repairs, courts, pollution, health care, land use, and many other financial impacts have linkages to automobile use in our country. Yet, because they are indirectly paid by the taxpayers through property and income taxes or other fees, they are not directly associated with incremental car use and provide no disincentive for the car driver to consider an alternative mode.

Without any public subsidy, LTD and other transit systems would not be able to provide service that is remotely competitive to the cost and perceived low-operating cost of the automobile. If transit received a level of public funding comparable to what automobiles receive, our transit availability would be much higher, like it is in Europe.

Q; Why does LTD only tax the business community? doesn't LTD tax everyone?

At the time the state-enabling law was passed allowing for the creation of LTD and Tri-

the premier transit-base facilities in the country. The District has built a total transfer stations at various key Eugene/Springfield locations since 1982 to safe, convenient boarding and transfers for our customers.

Q; What does LTD do to promote safe bus operations for bus drivers?

LTD drivers participate in annual training involving various aspects of bus operations and customer service. Safe driver training is conducted for employees every two years. New bus operators must complete a rigorous training course before they are assigned to revenue service. An employee safety committee meets monthly to evaluate service safety issues, review new proposals, analyze the circumstances of all accidents, and make recommendations for safety improvements in all areas of LTD's operations.

Q: How does LTD compare with other transit systems?

LTD is highly respected within the transit industry and has won numerous statewide, regional, and national awards. The District's performance has been noted by the University of North Carolina at Charlotte, which ranked LTD within the top five in the nation in its peer group and in the top 17 percent of transit systems for the overall efficiency and effectiveness of our operations, based on an analysis of 12 different transit system performance measures. LTD was one of the first transit systems in the nation to have a 100 percent wheelchair accessible fleet and is one of the few that is also

only commands respect within the transit industry and also maintains a strong tradition of active leadership and involvement in the community. 3 9/24/9

programs and operations. A recent national survey of public transit systems conducted by the University of North Carolina at Charlotte ranked LTD within the top five in the nation, in its peer group, based on 12 measures of operational efficiency and service effectiveness.

LTD is supported by excise fees on employees and, as such, is not publicly financed. Both the Eugene and Springfield Chambers of Commerce have taken public positions supporting the continued approval rather than election, of LTD Board members since individual voters do not pay taxes.

Q: Why does LTD cover its buses with advertising?

Advertising on buses has represented an important and ever-expanding revenue source for LTD since it was established in 1975. In the next five years, it will generate over \$1.5 million in nontax revenues for LTD to meet operating and capital needs. Given the high level of tax subsidy, this revenue source is very important. LTD's advertising revenue per bus has grown over time to be the highest among all west coast cities! While complaints are occasionally heard, the program overall has been very popular among riders and the community and provides a viable and low-cost advertising medium for local businesses and is enthusiastically endorsed by

business, and the appointment process would give businesses a defined process to comment on Board membership. State law requires that at least one member of the LTD Board must be a bus rider, and the appointment process ensures that this requirement is met. Compared to their counterparts, the LTD Board members have more freedom from special interest because they do not need to conduct fundraising programs for periodic campaigns. Their focus is on what is best for the community, instead of what is needed to satisfy campaign contributors.

LTD is operating very effectively under the current structure and enjoys strong community support. It is very questionable whether an elected board would result in any improvements. The District for many years consistently has ranked among the very best transit systems in the nation and has won numerous national awards for its



TAXES, REVENUES, AND GOVERNANCE

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LTD and other transit systems require public subsidies so that they can provide viable competition for the automobile, which is not only the most expensive but also the most heavily publicly-financed transportation mode in our society.

Several studies have shown gasoline taxes and other direct user fees only cover a portion of the actual costs of car use. Police services, accidents, insurance, road repairs, courts, pollution, health care, land use costs, and many other financial impacts have linkages to automobile use in our communities. Yet, because they are indirectly paid by the taxpayers through property and income taxes or other fees, they are not directly associated with incremental car use and, thus, provide no disincentive for the car driver to consider an alternative mode.

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Q. Why does LTD only tax the business community? Why doesn't LTD tax everyone?

At the time the state-enabling law was enacted allowing for the creation of LTD and Tri-Met in Portland, the payroll tax was selected as the primary funding source because it was efficient from a collection standpoint, and it was not being utilized by other local units of government. On two occasions, the LTD Board has sought voter approval for a broad-based alternative funding source in the form of a local income tax, but the measures were defeated by the voters.

Q. Why does LTD levy the maximum tax rate?

The following chart shows that LTD has not always charged the maximum tax rate. The District has adjusted the rate based upon revenues and the demand for increased service. In 2003, the State legislature raised the tax rate cap from .006 to .007 (\$6 per \$1,000 of payroll to \$7 per \$1,000 of payroll). This increase must be phased in over a 10-year

period ending in 2014. The LTD Board chose not to implement this tax upon authorization by the legislature. The current plan calls for the incremental increase to occur beginning in 2007.

| | | | |
|---------------------|---------------|----------------------|---------------|
| <u>1973</u> | <u>0.0047</u> | <u>October 1983</u> | <u>0.005</u> |
| <u>July 1974</u> | <u>0.0055</u> | <u>July 1987</u> | <u>0.0049</u> |
| <u>January 1979</u> | <u>0.005</u> | <u>January 1992</u> | <u>0.0056</u> |
| <u>January 1980</u> | <u>0.006</u> | <u>October 1994*</u> | <u>0.006</u> |

* The rate has been stable at .006 since October 1994.

Q. *Why did LTD decide to levy a tax on self-employed business people?*

Local employers have long felt that if some businesses subsidized LTD with a payroll tax, then all businesses should pay their fair share. Previously, the LTD payroll tax was only paid by employers. The extension of the LTD tax to self-employed business people generally was supported within the business community as a matter of equity, based on the feeling that all business should provide support for LTD, not just employers. The self-employment tax was authorized by the State legislature in 1979; however, LTD did not begin levying the tax until 1995.

The additional tax support for LTD will allow the transit district to expand its services in the community so that we can make progress toward local, state, and federal transportation goals. Given that approximately half of the environmental air pollution in

Oregon is caused by private automobile use, the clean air mandates require reductions in miles traveled via single-occupant vehicles. To achieve these goals locally, more trips must be made using alternative modes, and it will be necessary for LTD to increase and improve its services to make them more competitive with the private automobile.

Unfortunately, the U.S. Congress has been reducing, and plans to eliminate entirely, all operating assistance for local transit. As a result, transit systems all over the nation are being forced to rely more heavily on state and local funding. The additional revenues from the self-employment tax, and an associated increase in the payroll tax, will allow LTD to continue expanding and improving service despite the federal funding cuts.

Q. Why doesn't LTD just charge higher fares to those who ride the bus?

Passenger fares are an important revenue source for LTD and in an average year provide roughly 17 percent to 22 percent of the total revenues available to fund LTD's services. Compared

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to the bus fares in similar-sized cities, LTD's fares are at average return.

Each year, LTD makes appropriate upward adjustments in its fares in a manner that is consistent with the annual inflation in transportation costs, with a goal of optimizing total passenger revenues, while minimizing associated ridership losses. However, because our country's taxation policy has set the cost of incremental automobile use at an artificially low level, LTD has been forced to price its fares below the actual value of its service to the user to remain competitive. If our country followed the European model and assigned the true automobile usage costs to gasoline taxes rather than hiding them in property and income taxes, gas prices would approach \$5 per gallon, auto use would be significantly reduced, LTD would enjoy much higher ridership, and the District could cover a much higher percentage of its costs, perhaps all of them through passenger fares.

Q. Why doesn't LTD have an elected Board, like other tax-supported public agencies?

LTD Board members currently are appointed by the governor and approved by the state senate. At the time that LTD was established in 1971, the state legislature felt that an appointed board represented the most appropriate governance structure for a single-purpose public transportation agency such as LTD. This was thought to be

important because LTD was funded primarily with an employment tax on local business, and the appointment process would allow businesses a defined process to comment on Board membership. State law also requires that at least one member of the LTD Board must be a bus rider, and the appointment process ensures that this requirement is met. Compared to their elected counterparts, the LTD Board members have more freedom from special interest influence because they do not need to conduct fundraising programs for periodic election campaigns. Their focus is on what is best for the community, instead of what is necessary to satisfy campaign contributors. LTD is operating very effectively under the current structure and enjoys strong community support. It is very questionable whether an elected board would result in any improvements. For many years, the District has consistently ranked among the very best transit systems in the nation and has received numerous national awards for its programs and operations. Past national studies of public transit systems conducted by the University of North Carolina at Charlotte ranked LTD within the top five in the nation, in its peer group, based on 12 different measures of operational efficiency and service effectiveness.

LTD is supported by excise fees on employer payrolls and, as such, is not publicly

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financed. Both the Eugene and Springfield Area Chambers of Commerce have taken public positions supporting the continued appointment, rather than election, of LTD Board members since individual voters do not pay LTD taxes.

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Q. *Why does LTD cover its buses with advertisements?*

Advertising on buses has represented an important and ever-expanding revenue source for LTD since it was established in 1982. In the next five years, it will generate over \$1.5 million in non-tax revenues for LTD's service and capital needs. Given the level of tax subsidy, this revenue source is seen as very important. LTD's advertising revenue per bus has grown over time to be one of the highest among all west coast cities! While complaints are occasionally heard, the program overall has been very popular among riders and the community at large. It provides a viable and low-cost advertising medium for local businesses and has been enthusiastically endorsed by both the Springfield and Eugene Area Chambers of Commerce. The program has created partnerships for LTD with hundreds of local businesses who have chosen to advertise their products and services on LTD.

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TRANSIT OPERATIONS AND SERVICE

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Q. *Why do I see so many empty buses traveling around the community?*

All transportation systems, including roads and highways, are "empty" at times, and LTD is no exception. Buses may be empty during low-demand times in outlying areas or in the opposing direction of major traffic flow. However, LTD has very high ridership productivity standards for its routes and schedules. Service not meeting productivity goals is reviewed annually for revisions or possible elimination. LTD receives many requests for new services each year, and the District simply cannot afford to maintain service that is not utilized by riders on a regular basis. Even so, empty buses are sometimes spotted in the community at the start of their runs, heading to or from the garage, or even mid-route. However, during each hour of service, an average of 33 passenger boardings will be made on each LTD bus that is in service.

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For a metropolitan area our size, LTD ridership, rides per capita, and riders per vehicle hour totals have consistently ranked among the very highest in the nation. During the fiscal year, which closed June 30, 2004, 8,207,818 passenger boardings took place on LTD buses, a slight increase over the prior year.

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Deleted: of 5.7 percent

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Q. How many bikes do LTD buses carry?

Bike rack usage is so strong that LTD regularly allows customers to bring bikes inside the bus when the exterior racks are full. Over 600 bike boardings occur each day and over 15,000 each month. It encourages people to use alternative modes of transportation. Riding one way on a bike appeals to some people because of the trip distance they have to ride or because of the steep terrain they must negotiate. The bike racks allow people to use LTD for one leg of their trip.

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Q. *What is LTD doing to become more efficient in its operations?*

The District's success has been noted by the University of North Carolina at Charlotte, which ranked LTD within the top five in the nation in its peer group for the overall efficiency and effectiveness of our operations, based on a national analysis of 12 different transit system performance measures. Operational efficiency and effectiveness always have been key priorities at LTD, and over the years a number of programs have been established to enhance the District's performance: Employee Involvement: LTD maintains a number of employee committees which work to enhance the LTD's operational efficiency and effectiveness. In fact, successful LTD involvement programs were cited in a 1991 book published by the national Association

for Quality and Participation, Confessions of Empowering Organizations, authored by Dr. Ray Redburn, Richard Bittinger, et al.

Worker's Compensation and Time Loss: The District works closely with local health service providers and provides a number of employee programs to educate employees, motivate the earliest possible return to work, and maximize ongoing employee health and fitness for duty. LTD actively manages its claims to minimize losses, and in 1993 was awarded the largest refund in SAIF Corporation's history for our success in controlling our worker's compensation costs.

Accounting and Financial Controls/Procedures: In 2004, LTD was awarded an eighth consecutive Certificate of Achievement for Excellence in Financial Reporting from the Government Finance Officers Association of the United States and Canada. In addition, triennial reviews conducted by federal auditors have consistently complimented and endorsed LTD's operating policies and procedures.

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Deleted: accounting procedures, the senior auditor from Jones & Roth termed LTD the "best run public agency" that he had ever seen.

Safety: LTD has one of the best employee safety records in the transit industry. An employee safety committee reviews the circumstances of all accidents to evaluate their causes and identify preventive measures or strategies for safety improvements. Periodic safety audits are conducted at the workplace, and safe driver training classes

are conducted every two years. LTD is committed to maintaining a drug- and alcohol-free workplace. Employees in safety-sensitive positions undergo random drug and alcohol testing. New employees also undergo criminal background checks.

Management: LTD has an experienced and well-respected management team that not only commands respect within the transit industry, but also maintains a strong tradition of active leadership and involvement in the local community.

Facilities and Equipment: LTD's buses are modern and well-maintained. While our current average fleet age is below the national average as a result of our successful preventive maintenance program, our buses have for many years routinely exceeded national standards for the durability and length of service. LTD's modern operations and maintenance facility in Glenwood was opened in 1990 after years of planning, peer analysis, and value engineering and represents one of the premier transit-base facilities in the country. The District has built a total of 10 transfer stations at various key Eugene/Springfield locations since 1982 to facilitate safe, convenient boarding and transfers for our customers.

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Q. *What does LTD do to promote safe bus operation by the bus drivers?*

LTD drivers participate in annual training sessions involving various aspects of bus operations and customer service. Safe driver training is conducted for employees every two years. New bus operators must pass a rigorous training course before they are assigned to revenue service. An employee safety committee meets monthly to evaluate service safety issues, review new service proposals, analyze the circumstances of all accidents, and develop recommendations for safety improvements in all areas of LTD's operations.

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LTD is highly respected within the transit industry and has won numerous statewide, regional, and national awards. The District's success has been noted by the University of North Carolina at Charlotte, which ranked LTD within the top five in the nation in its peer group and in the top 17 percent of all transit systems for the overall efficiency and effectiveness of our operations, based on a national analysis of 12 different transit system performance measures. LTD was one of the first transit systems in the nation to have a 100 percent wheelchair-accessible fleet and is one of the few that also is

fully compliant with the Americans With Disabilities Act. **See attached peer group analysis showing LTD compared to similar-sized transit systems.**

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In 1993, LTD won the national E.D.I. Award from the national Easter Seals Society for LTD's leadership in promoting "Equality, Dignity and Independence for Persons with Disabilities." In 1994, LTD won awards from both the State of Oregon and the national Department of Energy for its successful Group Pass Program with the University of Oregon. LTD has won numerous awards from the American Public Transit Association and the Southwest Transit Association for its many innovative transit marketing programs. LTD regularly receives phone calls and visits from other transit systems who seek our guidance. LTD innovations, such as our Group Pass Programs, marketing projects, and accessible services, have become national models that have been adopted or imitated by numerous transit systems all over the nation.

Q. *Why doesn't LTD serve Florence or Oakridge?*

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Extension of LTD service also entails extension of the payroll tax. Consequently, the LTD Board does not consider extension of service unless requested to do so by local elected officials. The LTD Board of Directors has not yet received a request for service

from the city councils of these communities. If such a request is submitted in the future, the LTD Board would review the request and make a decision based on an analysis of many factors, including the extent of community support for the service, its compatibility with other LTD programs and services, ridership projections, and financial considerations.

Q. Why doesn't LTD start a light-rail service in the community like Portland's MAX?

In 1995, the Lane Council of Governments, along with other local agencies including LTD, sponsored an Urban Rail Study, which carefully examined the financial viability of light-rail and other forms of urban rail transit for our community. The study concluded that buses represented the most cost-effective transit service for our community, and that Eugene-Springfield lacked the necessary population, population density, and funding capacity to warrant fixed rail transit.

Q. What is Bus Rapid Transit?

Bus Rapid Transit (BRT) utilizes buses along major corridors in combination with signal prioritization strategies, dedicated rights-of-way, limited stops, special stations and other boarding improvements, prepaid fares, and low-floor, multi-door buses, which in combination will reduce the overall travel time for transit riders. Thus, BRT offers many of the operational advantages of light-rail transit, yet avoids the huge capital costs.

FACILITIES AND FLEET

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Q. Why doesn't LTD wash its buses in the winter time?

LTD's buses normally are washed on a daily basis. However, during freezing weather conditions, bus washing may be suspended for short periods of time for safety reasons and to avoid potential damage to the washing equipment. During snowy periods when the roadways become especially sloppy, even buses that are clean in the morning may appear quite dirty after the first few runs in the morning.

Q. Why does LTD continue to operate dirty, smelly, diesel buses when many transit systems around the nation are switching to less-polluting electric and natural gas buses?

Many transit systems around the nation are experimenting with alternative-fueled and powered buses. Such programs often are the result of special state and federal grant programs that test and foster the development of power plant alternatives to the tried-and-true diesel bus engines. However, to date, LTD has found that such options are not yet cost-effective or are not yet available in our community. LTD did purchase an early model hybrid-electric vehicle for use on the Breeze shuttle route. These vehicles experienced many operating problems and eventually were grounded. Since 2003, the hybrid-electric technology has progressed rapidly and LTD currently is under contract to purchase five hybrid-electric vehicles for the new bus rapid transit service called EmX. LTD continues to work to

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minimize the emissions from our diesel engines through careful maintenance and the use of special low-emission fuel options. LTD is participating with other local organizations in the Lane Clean Fuel Project, which is a commitment to burning low sulfur diesel or bio-diesel fuel.

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Q. Why does LTD insist on using only big, 40-foot buses?

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LTD currently operates both 30-, 35-, 40-, and 60-foot buses in its fleet and also has utilized 28-foot buses in the past. Because of their durability and flexibility, large buses have been the most cost-effective for transit systems when true life-cycle costs are considered. Also, since labor represents the largest factor in LTD's operating cost, and transportation systems are designed for peak capacity, large buses always have represented a prudent fleet investment for LTD, as well as for most other urban transit systems. Nevertheless, technological improvements in recent years have increased the viability of smaller buses, and they do offer some operational advantages along certain city streets. The larger buses also provide LTD the best opportunity to service community events such as the Lane County Fair, Oregon Country Fair, and University of Oregon football and basketball games.

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Q. Why doesn't LTD operate trolleys like those in San Antonio, Texas, or Park City, Utah?

Rubber-tired trolley vehicles are very popular with tourists and residents in communities throughout the United States. Many communities have experimented with such service and later discontinued it. In many cases, the remaining successful trolley services are either fully or partially funded by private organizations and serve to link high-pedestrian traffic destinations with parking lots and/or hotel clusters. To date in our community, no private organizations have been motivated to provide such service. LTD's own studies have concluded that our community currently lacks the critical mass of clustered origins and destinations that would be necessary to make a trolley route viable, and that any possible ridership gains from such vehicles would not justify their additional cost and maintenance expense.

Q. *Why doesn't LTD take care of the trash at its shelters and transit stations?*

LTD is committed to being a "good neighbor" in our community. LTD hires cleaning services to ensure that trash is removed and all facilities are cleaned on a regular and timely basis. Occasional "overloads" may still occur as a result of vandalism or other actions by careless individuals, but these are reported quickly to us by our bus operators, customers, or neighbors, and they are handled in an expedient manner. In

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some cases, LTD works with land and business owners to remove garbage. LTD encourages its customers to respect the area around the bus stops and regularly posts information encouraging customers to dispose of their trash on the bus.

Q. Why did LTD build such an extravagant "palace" out there in Glenwood?

LTD's Glenwood Operations and Maintenance facility represents one of the most complex construction projects ever undertaken in our community. Its design and development was marked by careful and precise planning, along with extensive citizen review and involvement, to guarantee that it would represent a truly cost-effective, long-term investment in the community's transportation infrastructure. Value engineering, peer review, and life-cycle cost analysis was utilized throughout to ensure the appropriateness, utility, and operational efficiency of the various design and construction features, and to maximize the return on each public dollar spent. Yes, it is a very nice facility, but we got it right the first time. Our citizens can be justifiably proud that it will efficiently and effectively serve our community's needs for decades into the future.

LABOR ISSUES

Q. *What is the status of LTD's problems with the labor union that represents its employees?*

LTD's current contract with the Amalgamated Transit Union expires in June 2007. Both

LTD and the union are working hard to overcome the issues that resulted in the March 2005 strike. Regular meetings are occurring between local union leaders and LTD executive staff. These meetings are creating a positive platform from which stronger labor relations can be built. LTD and the union will be working hard between now and the start of negotiations in early 2007.

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Deleted: LTD and the union have worked very cooperatively in recent years to ensure that the acrimony, which accompanied the 1993-94 contract negotiations, will not be repeated in the future. For example, a labor-management committee was formed in 1996 to deal with routine contract issues and disputes before they get out of hand, and a number of other initiatives have been jointly undertaken to maintain effective communications and cooperation. Both parties have pledged to keep the 1997 contract negotiations in "local" hands.

Q. *What is LTD doing to promote a more diversified work force?*

LTD recruitment and selection processes promotes the idea that our employees should represent the diversity of our community. LTD's current work force matches or exceeds the local demographics for diversity. Employees and supervisors also have participated in periodic cultural diversity sensitivity training programs, and LTD is a leader among local public agencies with respect to the representation of minorities within its work force.

Q. *How do wages and benefits at LTD compare to other local employers?*

LTD wages and benefits together are competitive when compared to other local employers. Compensation studies are conducted every few years, under review by the LTD Board of Directors and Budget Committee, to ensure that our wages and benefits remain consistently at or close to the median and appropriate relative to local standards.

RIDER SAFETY AND SECURITY

Q. *When is LTD going to do something about the gangs, panhandlers, and other problems at its downtown transit*

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LTD is, nevertheless, regarded as a good place to work. For example, in a recent recruitment effort, 111 people applied for five open positions.

station? I don't feel safe there and certainly won't let my kids go down there!

LTD has a close working relationship with the Eugene Police Department, and a police officer works out of our downtown Customer Service Center within the transit station. In addition, the District contracts with Wackenhut private security and the Eugene Downtown, Inc., "guides" to daily patrol the Eugene and Springfield downtown stations and other LTD facilities. All security staff work cooperatively with LTD employees and the police to ensure that our station remains safe for use by our employees and customers.

Q. *What is LTD doing about vandalism and graffiti?*

LTD removes signs of vandalism and graffiti as soon as possible after it is reported. Rewards are offered as a deterrent, and the District works closely in partnership with our neighbors and the police to catch and prosecute the offenders. Vandal-resistant shelters are replacing current glass shelters.

Q. *Why doesn't LTD do something about the filthy language that I sometimes hear on the bus?*

Foul language creates an unpleasant atmosphere for LTD employees and customers, and it is not tolerated. Our bus operators are trained to handle such situations, and we

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LTD has begun construction on a new downtown transit station, which will come on-line¶ in late 1997. The new, off-street facility will be on private property owned by LTD and¶ will feature state-of-the-art security to ensure the safety of everyone who uses our station. Negotiations are under way with the Eugene police to secure a police¶ substation within the new facility.

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very much appreciate the support of our customers who report such offenses as soon as they occur. Riders who refuse to behave and follow the rules are not allowed to continue to ride on the bus.

LTD Peer Group Comparison of Operating Characteristics
FY 2003-04

| System | Population | Service hours | Annual boardings | Fare revenue | Peak buses | Total employees | Operating budget | Capital Bud. (Avg per Yr) | Capital bud. % of Oper. | Serv Hrs per Capita | Boardings per Capita | Serv Hrs per Emp | Cost per Boarding | Fare Recovery | Cost per Serv Hr | Boardings per Serv Hr |
|-----------------------|----------------|----------------|------------------|--------------------|------------|-----------------|---------------------|---------------------------|-------------------------|---------------------|----------------------|------------------|-------------------|---------------|------------------|-----------------------|
| Ann Arbor, MI | 204,530 | 181,060 | 4,188,023 | \$2,719,956 | 56 | 170 | \$17,014,216 | \$2,972,200 | 17% | 0.89 | 20 | 1065 | \$4.06 | 16% | \$93.97 | 23.1 |
| Bakersfield, CA | 397,672 | 275,084 | 6,915,502 | \$3,600,000 | 65 | 234 | \$16,000,000 | \$5,440,000 | 34% | 0.69 | 17 | 1176 | \$2.31 | 23% | \$58.16 | 25.1 |
| Bellingham, WA | 174,365 | 91,798 | 2,853,050 | \$1,235,000 | 33 | 80 | \$4,694,728 | \$624,600 | 13% | 0.53 | 16 | 1147 | \$1.65 | 26% | \$51.14 | 31.1 |
| Colorado Spr., CO | 225,000 | 135,300 | 2,580,000 | \$1,600,000 | 47 | 138 | \$8,600,000 | \$7,000,000 | 81% | 0.60 | 11 | 980 | \$3.33 | 19% | \$63.56 | 19.1 |
| Fort Collins, CO | 120,000 | 60,909 | 1,300,000 | \$807,038 | 18 | 67 | \$4,808,419 | \$1,340,268 | 28% | 0.51 | 11 | 916 | \$3.70 | 17% | \$78.94 | 21.3 |
| Livermore, CA | 166,972 | 122,909 | 1,936,304 | \$1,708,543 | 49 | 165 | \$9,333,235 | \$7,000,000 | 75% | 0.74 | 12 | 745 | \$4.82 | 18% | \$75.94 | 15.8 |
| Olympia, WA | 136,640 | 136,681 | 2,770,715 | \$1,422,475 | 44 | 147 | \$10,512,780 | \$993,940 | 9% | 1.00 | 20 | 930 | \$3.79 | 14% | \$76.91 | 20.3 |
| Reno, NV | 253,000 | 251,052 | 7,528,805 | \$5,967,179 | 60 | 272 | \$18,999,182 | \$3,398,938 | 18% | 0.99 | 30 | 923 | \$2.52 | 31% | \$75.68 | 30.0 |
| Salem, OR | 210,000 | 168,541 | 5,500,000 | \$1,900,000 | 60 | 221 | \$17,300,000 | \$3,706,000 | 21% | 0.80 | 26 | 763 | \$3.15 | 11% | \$102.65 | 32.6 |
| Santa Cruz, CA | 255,602 | 233,389 | 5,819,450 | \$6,708,329 | 82 | 296 | \$29,793,815 | \$4,600,000 | 15% | 0.91 | 23 | 788 | \$5.12 | 23% | \$127.66 | 24.9 |
| Vancouver, WA | 365,000 | 245,000 | 6,700,000 | \$3,900,000 | 86 | 254 | \$20,900,000 | \$6,240,000 | 30% | 0.67 | 18 | 965 | \$3.12 | 19% | \$85.31 | 27.3 |
| Mean (average) | 228,071 | 172,884 | 4,371,986 | \$2,869,865 | 55 | 186 | \$14,359,670 | \$3,937,813 | 27% | 0.76 | 19 | 945 | \$3.42 | 20% | \$80.90 | 24.6 |
| Lane Transit | 270,000 | 315,936 | 8,207,818 | \$4,435,613 | 88 | 313 | \$23,389,618 | \$6,091,037 | 26% | 1.17 | 30 | 1009 | \$2.85 | 19% | \$74.03 | 26.0 |

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EUGENE STATION
 Q. . Why is LTD building a new facility downtown?
 • 10,000 customers a day currently use the downtown transfer station, which is spread over four blocks in downtown Eugene. Ridership is expected to double in the next 15 to 20 years.
 • The new transit station is being built to accommodate growth and improve operations.
 Q. . Who is going to pay for it?
 • The new station is already funded through a combination of federal and state grants and LTD. LTD has been placing money into reserves for several years to pay for its share of the project.
 Q. . How much is it going to cost?
 • The construction budget is about \$7 million.
 Q. . Are my bus fares going to go up?
 • No fare increases will occur because of the new station.
 • LTD regularly reviews its fare structure and makes adjustments to keep pace with the economic influences that drive the cost of providing service.
 Q. . How is the new station going to affect my bus routes?
 • Bus routes will be affected only in the downtown Eugene area. Buses coming into and out of the new station may have different routing to get them to the right bus bay in the new station.
 • The new station will have 20 bus bays on three platforms and all routes will arrive at and depart from the same location (bay).
 • By bringing all the buses into a central location, it will be easier and faster for customers to find their buses and make transfers.
 Q. . What will it look like?
 • The new station will be located between 10th & 11th Avenues and between Willamette & Olive Streets on the same block as the historic McDonald Theatre Building.
 • The site will have two buildings. The new Customer Service Center will be located on the corner of 11th & Willamette. The second building, located at the corner of 11th & Olive, will be used for LTD administrative purposes and possibly a new police sub-station.
 • All four sides of the site will have bus driveways to allow for rapid movement of vehicles in and out of the station. Each driveway will have an overhead arch with public art in the center.
 • There will be 20 bus bays on three platforms. The main platform will run diagonally across the site from the Customer Service Center to an open plaza at 10th & Olive.
 • The building exteriors will be brick and masonry and will be architecturally compatible with the historical buildings in the surrounding neighborhood.
 • The main shelter canopy, which runs along the diagonal platform, will have a full-length glass skylight and a clock tower at the plaza end. There also will be passenger shelters, without skylights, on the other platforms.
 • The platforms and bus driveways will be colored concrete, with brick pavers used to accent walkways, crosswalks and bus bays.
 • Trees, shrubs, flowers, and other greenery will be used throughout the station.
 • The plaza area in the northwest corner of the station will have public seating areas