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LANE TRANSIT DISTRICT SPECIAL BOARD MEETING/WORK SESSION

Monday, September 12, 2005
5:30 p.m.

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

A G E N D A

	<u>Page No.</u>
I. CALL TO ORDER	
II. ROLL CALL	
Ban _____ Davis _____ Eyster _____ Gant _____	
Gaydos _____ Kleger _____ Kortge _____	
III. PRELIMINARY REMARKS BY BOARD PRESIDENT	
IV. ANNOUNCEMENTS AND ADDITIONS TO AGENDA	02
V. WORK SESSION	
A. Community Research (45 minutes)	03
B. Federal Funding for Capital Projects (30 minutes)	10
C. Report on 2005 Legislative Session (20 minutes)	14
D. Annual Strategic Planning Work Session Agenda Suggestions (10 minutes)	25
E. Hybrid Vehicles (30 minutes)	26
VI. ADJOURNMENT	

Alternative formats of printed material and/or a sign language interpreter will be made available with 48 hours' notice. The facility used for this meeting is wheelchair accessible. For more information, please call 682-6100 (voice) or 1-800-735-2900 (TTY, through Oregon Relay, for persons with hearing impairments).

AGENDA ITEM SUMMARY

DATE OF MEETING: September 12, 2005

ITEM TITLE: ANNOUNCEMENTS AND ADDITIONS TO AGENDA

PREPARED BY: Jo Sullivan, Administrative Services Manager/Clerk of the Board

ACTION REQUESTED: None

BACKGROUND: This agenda item provides a formal opportunity for Board members to make announcements or to suggest topics for current or future Board meetings.

ATTACHMENT: None

PROPOSED MOTION: None

AGENDA ITEM SUMMARY

DATE OF MEETING: September 12, 2005

ITEM TITLE: COMMUNITY RESEARCH STUDY

PREPARED BY: Andy Vobora, Director of Marketing and Communications

ACTION REQUESTED: None

BACKGROUND: Lane Transit District regularly surveys customers through an on-board survey and general community members through the market area study. These research projects occur approximately every four years. Valuable information about customers and potential customers is tracked over time; however, these surveys do not provide more targeted responses from specific segments within the community. To reach these segments, the District conducted additional research targeted toward payroll taxpayers, community leaders, and elected officials.

The results of this research will be shared by Bob Moore of Moore Information. During the presentation staff will provide comparisons with other research and provide the Board an outline of what tools will be used to address issues raised by the research.

RESULTS OF RECOMMENDED ACTION: District staff will proceed with plans to address issues through marketing and public relations strategies.

ATTACHMENT: Research Summary

PROPOSED MOTION: None



*Lane Transit District
P. O. Box 7070
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FEDERAL FUNDING FOR CAPITAL PROJECTS

**Linda Lynch, Government Relations Manager
Stefano Viggiano, Director of Development Services**

September 12, 2005

LTD receives three types of federal grants: formula funds, discretionary capital investment grants, and regional formula funds through the Surface Transportation Program.

Formula (Section 5307)

Formula funds are allocated annually by the Federal Transit Administration (FTA), based on the annual Congressional appropriation. They are distributed by a formula based on population, service area, and other criteria. The amount can fluctuate from year to year, but LTD currently receives approximately \$4 million per year, all of which must be used for capital purchases and projects. A portion of formula funds can be used to support some Transportation Demand Management and security functions and to purchase fleet parts.

LTD has used formula funds to purchase buses and passenger shelters, and to supplement capital investment grants.

Surface Transportation Program (STP, STP-U)

This program is part of highway funding. It has two components. The first, STP-U for "urban," represents formula funds that are distributed to the local Metropolitan Planning Organization (MPO) for redistribution to all local transportation providers, which includes the cities of Eugene, Springfield, and Coburg and Lane County and Lane Transit District. For the next four years, it is estimated that STP-U funds will be over \$3 million per year for our MPO. LTD has secured funds from this source for BRT planning, transportation demand management, and passenger amenities.

The second (STP) is the money that goes to the state, most of which is used to supplement state money for highway maintenance and construction. Some of it is available to local governments to supplement other funding for local transportation projects, including transit. The state legislature has mandated that some of the state's STP money be used for capital grants specific to transportation services for the elderly and disabled. A small amount is also

mandated for urban transit fleet replacement. This source contributed significantly to the construction of the RideSource administrative and maintenance facility.

Capital Investment Grants (Section 5309)

Capital investment grants are available in three categories that are generally considered as rail, rail modernization, and bus. Historically, these funds were controlled and allocated by the FTA, but over time Congress has fully earmarked the funds available for specific projects. This category is the source for discretionary funds the District has received. LTD has gone directly to the Congress to seek funds for buses, construction of the Eugene and Springfield Stations, the administrative and maintenance facility in Glenwood, and the bus rapid transit project. The District's success in securing earmarks has meant that it has never used debt to finance vehicles or construction.

The 2005 transportation bill (SAFETEA-LU) divides the category previously thought of as "rail" into projects requiring more and less than \$75 million in federal assistance. The purpose of such a division is to open the rail category to other "fixed guideway" projects such as streetcars and bus rapid transit.

The District lobbied for this division (of more or less than \$75 million). The resulting program is referred to as "Small Starts" and is authorized for funding beginning in FY 2007. The "Small Starts" program is funded by a takedown from the capital investment program for a total of \$200 million per year for FY 07, 08, and 09. There are 52 projects similar in one way or another to Pioneer Parkway EmX authorized to compete for the \$600 million available.

In SAFETEA-LU

LTD secured funding for:

- Pioneer Parkway EmX alternatives analysis - \$1 million
- New bus purchases - \$2,985,714
- Progressive Corridor Enhancement - \$2,477,586

The alternatives analysis will be appropriated \$500,000 per year for FY 05 and 06. The other awards are appropriated evenly over four years.

There were other provisions in the bill that benefited or interested LTD. Specific policy language will allow LTD to dispose of the hybrid electric AVS buses before their assumed useful life is complete without having to pay any un-amortized portion of the federal interest. As of January 2005, that was estimated at \$1.020 million. This is not a direct appropriation; it merely acknowledges that all parties in the sale and purchase of those buses made a good faith effort to produce them, service them, and fund them, but that they failed anyway. As a result, LTD will not be required to keep them for another three years before replacement.

The Pioneer Parkway EmX was authorized to proceed into preliminary engineering, following completion of the alternatives analysis and Environmental Impact Statement. The project was authorized for \$31 million, but the authorization does not guarantee that funding. The District still will need to have the project recommended by the Federal Transit Administration to the Congress and to lobby for the funding. The authorization is a good start and indicates Congressional intent to fund it.

AGENDA ITEM SUMMARY

DATE OF MEETING: September 12, 2005

ITEM TITLE: FEDERAL FUNDING FOR CAPITAL PROJECTS

PREPARED BY: Linda Lynch, Government Relations Manager
Stefano Viggiano, Director of Development Services

ACTION REQUESTED: None

BACKGROUND: LTD receives three types of federal grants: formula funds, discretionary capital investment grants, and regional formula funds through the Surface Transportation Program. Those grant programs are described in some detail in the attached staff report, and staff will discuss them with the Board during the work session on September 12.

ATTACHMENT: Staff Report: Federal Funding for Capital Projects

PROPOSED MOTION: None

AGENDA ITEM SUMMARY

DATE OF MEETING: September 12, 2005

ITEM TITLE: HYBRID VEHICLES

PREPARED BY: Ken Hamm, General Manager

ACTION REQUESTED: None

BACKGROUND: At the September 12 meeting, staff will show two brief videos on hybrid technology and discuss this technology with the Board.

ATTACHMENT: None

PROPOSED MOTION: None

AGENDA ITEM SUMMARY

DATE OF MEETING: September 12, 2005

ITEM TITLE: REPORT ON THE 2005 LEGISLATIVE SESSION

PREPARED BY: Linda Lynch, Government Relations Manager

ACTION REQUESTED: None

BACKGROUND: In the 2005 Legislative Session, Lane Transit District was represented by Doug Barber of the Ulum Group. Mr. Barber will be present at the Monday, September 12, work session to discuss transit issues from the session.

ATTACHMENTS: End of Session 2005 Legislative Report
Final Measure Status Report for Oregon Transit Association

PROPOSED MOTION: None

QuickTime™ and a
Graphics decompressor
are needed to see this picture.

End of Session 2005 Legislative Report

Prepared for Lane Transit District

August 2005

SESSION OVERVIEW

A session of low expectations: After years of budget cuts, the 2005 Legislature seemed satisfied to do no harm. The governor and Republicans were committed to “no new taxes” and they fulfilled that commitment. Most programs escaped major cuts; a few even began to rebuild. But few major policy initiatives were launched. Those that were didn’t go far. In a session of low expectations, the Legislature met its goal.

In many ways the 2005 session will be remembered for what it did not do. Virtually no progress was made on stable funding for schools, tax reform, a rainy day fund, capital gains tax cuts, bills to make health insurance more available or affordable, child welfare protection, and legislation to implement Ballot Measure 37 dealing with landowners’ rights.

With Democrats in control of the Senate for the first time in a decade and Republican conservatives in control of the House, this was a session where compromise was the key to major accomplishments. Unfortunately, compromise was notably absent with a few major exceptions. Rep. Wayne Krieger (R-Gold Beach) and Sen. Ginny Burdick (D-Portland) worked together to shepherd through a package of bills targeting Oregon’s growing methamphetamine problem. Requiring a prescription for medications containing pseudoephedrine was the most controversial component. The package also includes a rewriting of Oregon’s civil forfeiture statute.

On most issues, politics took precedence over policy. House Republicans and Senate Democrats played to their constituents, and prepared for the 2006 campaigns, by passing bills they knew had no chance in the other chamber. Among these issues were parental notification for abortions, civil unions, and fetal rights.

There was a thin list of accomplishments. Mental health parity passed after 15 years of debate. The bill will help a small number of people who have group health insurance. Insurance companies say only 3 percent of policyholders ever reach the benefit limits in current policies. But the idea of mental health parity took on symbolic importance. It helps erase the stigma of mental illness and assures that mental illness is treated like any other illness.

ConnectOregon, a \$100 million investment in non-highway transportation projects, was one of the session’s other major accomplishments. Ports, rail, air and transit construction projects throughout the state will receive a badly needed infusion of state support.

Many legislators, even Democrats, complained that Gov. Kulongoski was missing in action throughout the session. Unlike his predecessor, Kulongoski stayed out of most policy and budget debates. That led to questions about whether Kulongoski will run for a second term, but it now appears certain.

During next year's campaigns, legislators and the governor will spend millions of dollars puffing up their accomplishments from the recently completed session. But the 2005 session will be remembered as the second longest in Oregon history, not the most productive.

Twists and turns on the budget trail: The 2005 session traversed one of the strangest budget paths in recent memory.

Within the first three weeks of the session, Ways and Means Co-Chair Rep. Dan Doyle (R-Salem) resigned amid a campaign finance reporting scandal. Rep. Wayne Scott (R-Canby) was called on to do double duty when he took over Doyle's role as chief House budget writer as well as his previous job as House Majority Leader.

In late March, House and Senate leaders reached an historic budget agreement deciding early in the session that the 2005-07 budget would be \$12.393 billion, no more and no less. At the time, it wasn't clear where all that money would come from. But as the economy and state revenue forecasts improved, it turned out more than \$12.393 billion was available. Democrats complained they were leaving money on the table -- money they wanted to use for education and social services.

The early budget agreement tantalized lawmakers with the prospect of a short session. Mid-June was bandied about as a realistic goal for adjournment. That wasn't to be.

In May, House Speaker Karen Minnis (R-Wood Village) dissolved the Joint Ways and Means process, complaining that budget negotiations were going nowhere. Separate House and Senate Budget Committees were established, doubling the work for agencies, legislative fiscal staff and advocates, and dramatically slowing down the process.

The budget stalemate dragged on through June and July. To give budget negotiators more time to work out details, the House sent legislators home for a series of three-day adjournments, what some lawmakers decried as paid vacations. Though House and Senate budgets were only \$50 million apart — Senate Democrats wanted to spend more on K-12; House Republicans wanted to put the money into human services — it took weeks to bridge the gap.

In the end:

- Legislators stuck to the \$12.393 billion budget agreement
- K-12 received \$5.24 billion plus an additional \$29 million if the June 2006 revenue forecast is up and
- No new taxes were added.

KEY TRANSIT LEGISLATION

SB 71 – ConnectOregon to fund non-highway transportation projects

ConnectOregon is a precedent-setting funding program for non-highway transportation projects. SB 71 provides \$100 million in lottery-backed bonds for rail, ports, air and public transit projects. LTD could apply for up to \$7.5 million for Phase 2 construction of the bus rapid transit system.

The Oregon Transportation Commission will oversee the grant-making process. Fifteen percent of the funds must be allocated to each of the five ODOT regions. Projects will compete for the rest of the funds. Grant recipients must provide at least 20 percent of the project's cost.

SB 71 wound a long, torturous path through the legislative process. Everyone wanted their fingerprints on the bill, so the details kept changing, though the final version was very similar to the bill that was introduced.

The bill includes broad criteria for project consideration including:

- Does the project reduce transportation costs for Oregon businesses;
- Will it benefit or connect two or more modes;
- Is it a critical link in a statewide or regional transportation system;
- How much of the cost can be borne by the applicants;
- Does the project create construction and permanent jobs in the state; and
- Is the project ready for construction?

Strong support from every region of the state helped assure SB 71's passage. Many cite it as one of the session's most significant accomplishments. **PASSED**

ODOT budget adds \$2 million for bus replacement funding

The Oregon Department of Transportation's \$2.7 billion budget for 2005-07 includes \$4 million in bus replacement funding: \$2 million immediately and \$2 million to the E-Board, pending passage of the federal Transportation bill. That is a \$2 million increase over the 2003-05 biennium.

Funding for Elderly and Disabled transit continued at approximately the same level as the previous biennium. Of course, much of ODOT's work during the 2005 session was on SB 71, ConnectOregon (see above).

SB 558 - elected transit board

Sen. Bill Morrisette (D-Springfield) and Rep. Paul Holvey (D-Eugene) led the charge to change Lane Transit District's board from appointed to elected. In testimony before a Senate committee, the lawmakers described the current system as "taxation without representation" and claimed that LTD's board does not reflect community needs.

Roger Martin, representing the Oregon Transit Association, testified against the bill, explaining the problems elected boards have had in other cities. Andy Vobora from LTD outlined the success of LTD under its appointed board and questioned the need to change a successful system.

Jack Roberts, Lane Metro Partnership, and Terry Connolly, Eugene Area Chamber of Commerce, also testified in opposition to the bill.

Though the bill had little support in the Senate Transportation committee, Sen. Floyd Prozanski (D-Eugene) continued to push for amendments to SB 558 that would change LTD's board to four elected members and three appointed members. No action was taken on SB 558.

FAILED

HB 3505 – condemnation

Efforts to rewrite Oregon's condemnation statutes stalled in the Senate at the end of the session.

HB 3505 was a response to the U.S. Supreme Court decision in a case out of New London, Connecticut, allowing the city to condemn private property for another private

development. No similar problems have surfaced in Oregon, but lawmakers want to preempt the possibility. However, HB 3505 was much broader than that. Cities, counties and public districts feared that sweeping language in the bill would have a host of unintended consequences. The bill passed the House in the closing days of the session but no action was taken by the Senate.

After the Legislature adjourned, Oregonians in Action (the group that passed Ballot Measure 37) filed an initiative petition on condemnation for the November 2006 ballot. That initiative exempts “property condemned for maintenance, improvement or construction of transportation facilities...” The group has until July 2006 to collect enough signatures to qualify. **FAILED**

HB 2932 – free transit passes for veterans

Even the veterans testified that they didn’t need this bill. A representative of Oregon Paralyzed Veterans of America said other programs are available for vets who are disabled or looking for work. Oregon veterans testified that it would be an administrative nightmare to issue bus passes to all vets. No action was taken on HB 2932.

The Oregon Transit Association agreed to work with the Employment Division on a transit program to help unemployed vets who need transportation. In the final budget, the Employment Division received \$54,000 to purchase transit passes for veterans. **FAILED**

HB 2157 – background checks and fingerprinting

TriMet gained additional background check authority in HB 2157. The bill allows TriMet and other agencies to conduct national criminal background and fingerprint checks on contractors who have access to sensitive information or areas. LTD did not ask to be included in the bill. **PASSED**

SB 992 – increased Senate role in appointments

Sen. Vicki Walker (D-Eugene) introduced SB 992 to give the Senate paid staff, an Executive Appointments Administrator, to do background checks on the governor’s appointments and possibly gather nominees to give to the governor.

SB 992 also would have eliminated Senate confirmation for some appointments, including appointments to mass transit boards. LTD and TriMet both opposed the bill. They want Senate confirmation for their boards.

The bill had one hearing but did not move. **FAILED**

HB 3481 – pollution control tax credit

TriMet introduced an amendment to HB 3481 that would allow transit districts to sell pollution control tax credits (PCTC) earned by retrofitting diesel buses with particulate traps. The bill would have allowed transit districts to sell the 35 percent tax credit to help pay for the retrofit costs.

Adding particulate traps to buses costs approximately \$7,000 per bus. The tax credit would defray close to \$2,000 of that cost.

The transit district amendment was one very small piece of a much larger pollution control tax credit and biodiesel incentives bill. A quarrel over whether businesses should receive tax credits simply for complying with federal law sunk the bill. **FAILED**

SB 448 – Tillamook transit exemption

Tillamook’s transit service into Portland violated the 40-mile rule in Oregon’s motor carrier law. SB 448 fixes those legal issues. There was no opposition to the bill.

PASSED

Randy Papé reappointed to OTC

Gov. Kulongoski reappointed Randy Papé to another four-year term on the Oregon Transportation Commission. This is a critically important position because OTC is charged with implementing SB 71, ConnectOregon.

SUMMARY

This turned out to be a great session for LTD. We fought some bills: elected board and condemnation. We helped preserve and enhance funding for bus replacement, and elderly and disabled transit.

LTD is also very well positioned to take advantage of funding in the new ConnectOregon program. The meetings we held with ODOT and key legislators, beginning before the session started, made bus rapid transit a model for why public transit should even be included in ConnectOregon.

LTD bill tracking Web site: <http://www.capitolonramp.com/cor/guests/1437260/>

For more information, contact Doug Barber at dbarber@ulum.com or 541-434-7023.



MOORE INFORMATION

OPINION RESEARCH • STRATEGIC ANALYSIS

**LANE TRANSIT DISTRICT BUSINESS AND OPINION LEADERS
(N=150/55/20)
JUNE 27-JULY 15, 2005**

OPINION LEADERS/ELECTED OFFICIALS INTRO:

Can I speak to (FROM LIST)? IF NA: SCHEDULE CALLBACK. Hello, this is (FIRST AND LAST NAME) of Moore Information, a public opinion research company. We are conducting a study among opinion leaders in your area today. Let me assure you, we are not selling anything.

Because you have been identified as an opinion leader in Lane County, we would appreciate hearing your thoughts about Lane Transit. Can you spend a few minutes on the phone with me to discuss a few issues? Your input is very important.

IF YES: GO TO Q1

BUSINESS LEADERS INTRO:

Can I speak to (FROM LIST)? IF N/A: SCHEDULE CALLBACK. IF NO LONGER WITH COMPANY: Could I speak to the person in charge? IF NA: GET NAME OF CONTACT, SCHEDULE CALLBACK.

Hello, this is (FIRST AND LAST NAME) of Moore Information, a public opinion research company. We are conducting a study among business leaders in your area today. Let me assure you, we are not selling anything. We would appreciate hearing your thoughts about Lane Transit. Can you spend a few minutes on the phone with me to discuss a few issues? Your input is very important.

IF YES: First, does your company pay Lane Transit District payroll excise taxes?

1. yes CONTINUE
2. no/don't know THANK AND TERMINATE

ALL

1. First of all, how important is Lane Transit District to people in Lane County?
(READ 1-4, 4-1)

	<u>Payroll Taxpayers</u> (N=150)		<u>Community Leaders</u> (N=55)		<u>Elected Officials</u> (N=20)	
	%		%		%	
1. very important	33		18		55	
2. fairly important	33	(67)	40	(58)	30	(85)
3. not too important	21	(29)	27	(35)	5	(5)
4. not important at all	7		7		--	
5. (DON'T READ) don't know	5		7		10	

2. Based on your own personal experience or anything you may have seen, read, or heard, do you think Lane Transit is doing an excellent, good, fair, or poor job?

1. excellent	9		5		20	
2. good	32	(41)	47	(53)	45	(65)
3. fair	31	(49)	27	(44)	25	(35)
4. poor	19		16		10	
5. (DON'T READ) don't know	10		4		--	

3. What, in your opinion, is the major strength of Lane Transit District?
(RECORD RESPONSE VERBATIM)

1. Good coverage/accessibility/routes	18		13		20	
2. Provides a choice/another choice/ alternative mode of transportation	17		15		20	
3. Senior/disabled services/handicap services/access	7		--		10	
4. Service-oriented/serve the public/ community	4		5		--	
5. Number of buses/frequency	3		4		--	
6. Advertising on the sides	3		--		--	
7. Provide buses/transportation for games/special events	3		--		--	
8. They are the only one/a monopoly	2		--		--	
9. That they are there/what they do/ provide	2		--		--	
10. Ability to secure federal funding/ government subsidies	1		2		--	
11. Large tax base/budget/have a lot of money to work with	1		2		5	
12. Quality buses/sufficient transportation	1		2		--	
13. Successful/well run/good management	1		5		--	
14. Serves/supports U of O/students	1		2		--	
15. Keeps communities connected	1		--		--	
16. Reduces traffic/congestion	1		2		5	
17. Free rides	1		--		--	
18. Timeliness	1		2		--	

		<u>Payroll Taxpayers</u>	<u>Community Leaders</u>	<u>Elected Officials</u>
19.	The drivers/employees	1	2	--
20.	Low cost/affordable fares	1	--	--
21.	Modernizing/upgrading	1	--	--
22.	Allow bikes on their buses	1	--	--
23.	They are union	1	--	--
24.	Park and ride	1	--	--
25.	Dependability/consistency	1	--	5
26.	Good pay	--	--	5
27.	Community based company/ community involvement	--	4	5
28.	Diverse services	--	--	5
29.	The passengers/riders	--	2	--
30.	Successful initiation of the BRT/BRT	--	2	5
31.	Ability to tax employers/businesses	--	2	--
32.	Will become more prevalent as gas prices increase	--	2	--
33.	Nothing/none	5	--	--
34.	Don't know	23	35	15
4.	What suggestions for improvement do you have for Lane Transit? Anything else? (RECORD RESPONSE VERBATIM, ACCEPT UP TO THREE)			
1.	Smaller buses/stop using larger buses on low ridership routes	12	11	5
2.	Operate within predetermined budget/ budget oversight needed/cutbacks needed	9	11	5
3.	Shouldn't have to pay taxes for a service I/we don't need/can't use	6	2	--
4.	Depend less on tax revenue/government subsidies/be more self-sufficient	6	2	--
5.	Better coverage/accessibility/ more stops/more buses	5	--	--
6.	More routes/better planned routes/ more frequent service	5	4	20
7.	Need new management/reduce management/spend less on management salaries	5	2	--
8.	Should close down/leave Lane County	4	2	--
9.	Move bus stops out of traffic lanes	3	--	--
10.	Extend hours of operation/more flexible schedules	3	4	--
11.	Should be funded by riders	3	--	--
12.	Improve/bring back recently cut service to outlying/rural areas	3	--	--
13.	Streamline operations/eliminate routes/ decrease frequency on routes with low ridership	3	7	--
14.	Lower costs/don't raise fares	2	--	10
15.	Eliminate Cottage Grove route/routes	2	--	--

	<u>Payroll Taxpayers</u>	<u>Community Leaders</u>	<u>Elected Officials</u>
16. Public awareness/educate public on routes/availability	2	--	--
17. Efficiency/be more efficient	2	2	--
18. Build smaller/less expensive buildings	2	--	5
19. Increase ridership/not enough people to support it	1	7	5
20. Only operate on routes that pay/cost effective routes	1	7	--
21. Spend less on trees	1	--	--
22. Spend less on artwork	1	--	--
23. Better fuel efficiency/make buses more environmentally friendly/use natural gas	1	2	10
24. Train drivers (to drive better/be more friendly)	1	--	5
25. Discontinue/spend less on BRT	1	5	--
26. Provide transfer points outside of downtown/the main hub	1	2	--
27. Color coded buses/system	1	--	--
28. Open forum to voice opinion/consider public's opinion	1	2	--
29. Discontinue/spend less on light rail	1	--	--
30. Keep down external costs	1	--	--
31. Cut back unnecessary services	1	--	--
32. Keep off residential streets	1	--	--
33. Need a Marcola route	1	--	--
34. Spend more on services	1	--	--
35. Spend less on infrastructure	1	--	--
36. Don't increase taxes	1	2	--
37. More express buses/express routes	1	--	--
38. Shorten commute times/better scheduling coordination	1	--	5
39. Discontinue/spend less on Eugene to Springfield project	1	2	--
40. Better senior/disabled services/handicap services/access	1	--	--
41. Increase security	1	--	--
42. Discontinue/spend less on advertisements	1	--	--
43. Use less expensive land	1	--	--
44. Send wheelchair accessible taxis to homes rather than use city buses	1	--	--
45. Empty trash receptacles at stops	1	--	--
46. Need an Oakridge route	1	--	--
47. Continue expansion	1	--	--
48. Give benefits/don't be hasty with benefits given	1	--	--
49. Focus more on passengers	1	--	--
50. Focus more on employees	1	--	--
51. Increase distance between stops	1	--	--

		<u>Payroll Taxpayers</u>	<u>Community Leaders</u>	<u>Elected Officials</u>
52.	Improve communication between employees and management	1	--	--
53.	Improve communication with businesses near construction sites	1	--	--
54.	Dislike/discontinue the new express line	1	--	--
55.	Need a coast route/have route that goes to the coast	1	--	--
56.	Need to run it more like a business	1	2	--
57.	Improve park and ride/provide more centralized parking	1	--	--
58.	Pay drivers what they're worth	--	2	--
59.	Reduce Sunday coverage/service	--	--	5
60.	Not be so beholden to the union	--	2	--
61.	Better communication with the public	--	2	--
62.	Strengthen relations with payroll company	--	2	--
63.	Charge regular fares for game riders	--	2	--
64.	Consider privatization	--	2	--
65.	Continue/accelerate BRT project	--	--	15
66.	Board of Directors should be elected	--	--	15
67.	Nothing/none	1	--	--
68.	Don't know	31	38	40

Next, I would like you to evaluate Lane Transit on a variety of issues. Using a five-point scale, where five is excellent and one is poor, what number between five and one best describes how you would rate Lane Transit on each of the following? (RECORD 1-5, DK=6)

ROTATE 5-16

5. competence and efficiency of Lane Transit Board of Directors

1.	poor	17	7	5
2.	2	17 (33)	15 (22)	10 (15)
3.	3	16	29	25
4.	4	10 (13)	27 (31)	15 (45)
5.	excellent	3	4	30
6.	don't know	38	18	15

6. on-time performance of buses

1.	poor	1	--	--
2.	2	2 (3)	-- (--)	5 (5)
3.	3	13	11	15
4.	4	30 (48)	15 (25)	35 (50)
5.	excellent	18	11	15
6.	don't know	36	64	30

7. competence and efficiency of Lane Transit management

		<u>Payroll</u>		<u>Community</u>		<u>Elected</u>	
		<u>Taxpayers</u>		<u>Leaders</u>		<u>Officials</u>	
1.	poor	16		5		15	
2.	2	13	(29)	15	(20)	5	(20)
3.	3	25		25		15	
4.	4	7	(13)	29	(38)	25	(50)
5.	excellent	6		9		25	
6.	don't know	33		16		15	

8. cleanliness and appearance of buses

1.	poor	3		2		--	
2.	2	3	(5)	--	(2)	--	(--)
3.	3	11		18		10	
4.	4	42	(76)	38	(62)	45	(70)
5.	excellent	34		24		25	
6.	don't know	7		18		20	

9. personal safety on buses and at bus stops

1.	poor	3		--		--	
2.	2	5	(8)	5	(5)	5	(5)
3.	3	16		9		15	
4.	4	31	(49)	16	(33)	10	(50)
5.	excellent	18		16		40	
6.	don't know	27		53		30	

10. keeping costs down

1.	poor	24		27		15	
2.	2	17	(41)	22	(49)	10	(25)
3.	3	18		15		25	
4.	4	9	(17)	15	(20)	35	(40)
5.	excellent	8		5		5	
6.	don't know	24		16		10	

11. Lane Transit management efforts to resolve the strike

1.	poor	12		4		25	
2.	2	21	(33)	15	(18)	5	(30)
3.	3	24		25		15	
4.	4	14	(24)	24	(45)	15	(45)
5.	excellent	10		22		30	
6.	don't know	19		11		10	

12. availability of information about travel on buses

		<u>Payroll</u>	<u>Community</u>	<u>Elected</u>		
		<u>Taxpayers</u>	<u>Leaders</u>	<u>Officials</u>		
1.	poor	6	4	--		
2.	2	6	(12)	11	(15)	5 (5)
3.	3	19		25		20
4.	4	33	(57)	33	(42)	40 (70)
5.	excellent	23		9		30
6.	don't know	13		18		5

13. bus driver courtesy

1.	poor	1		4		--
2.	2	3	(4)	7	(11)	5 (5)
3.	3	12		11		10
4.	4	26	(48)	11	(18)	15 (40)
5.	excellent	22		7		25
6.	don't know	36		60		45

14. accountability of Lane Transit Board of Directors

1.	poor	19		7		10
2.	2	15	(33)	16	(24)	15 (25)
3.	3	16		33		25
4.	4	6	(9)	18	(24)	15 (35)
5.	excellent	3		5		20
6.	don't know	41		20		15

15. efficient use of taxpayer dollars

1.	poor	35		25		15
2.	2	14	(49)	29	(55)	-- (15)
3.	3	19		11		30
4.	4	11	(16)	22	(24)	25 (50)
5.	excellent	5		2		25
6.	don't know	16		11		5

16. convenience and ease of use of bus services

1.	poor	9		4		--
2.	2	9	(18)	11	(15)	10 (10)
3.	3	20		16		25
4.	4	39	(49)	44	(49)	40 (55)
5.	excellent	10		5		15
6.	don't know	13		20		10

17. Based on what you know or have heard, do you believe Lane Transit District is a good place to work, or not?

		<u>Payroll Taxpayers</u>	<u>Community Leaders</u>	<u>Elected Officials</u>
1.	yes	62	62	65
2.	(DON'T READ) don't know	31	36	25
3.	no	7	2	10

18. IF YES/GOOD PLACE TO WORK: What is the major reason you say that? (RECORD RESPONSE VERBATIM)

1.	Good pay	30	41	23
2.	Know employee(s)/word-of-mouth	25	24	23
3.	Benefits	14	9	8
4.	Heard nothing negative/no complaints	5	--	--
5.	Unionized	4	--	--
6.	Employ a lot of people	3	--	--
7.	A lot of long-term employees/low turnover	3	6	--
8.	Job stability/steady work	3	3	15
9.	The strike was settled	2	--	--
10.	Ex-truckers readily employed	1	--	--
11.	Well-managed organization	1	3	8
12.	General feeling	1	--	--
13.	Government job	1	--	--
14.	Long/stable history	--	--	8
15.	Good/safe working conditions	--	--	8
16.	Responsive to employees/care about their employees	--	9	--
17.	Don't know	5	6	8

19. IF NO/NOT A GOOD PLACE TO WORK: What is the major reason you say that? (RECORD RESPONSE VERBATIM)

1.	Strike/labor dispute	27	--	50
2.	Not responsive to employees	27	--	--
3.	Their priorities are wrong	9	--	--
4.	Poorly managed	9	--	--
5.	Don't know employee(s)	9	--	--
6.	Heard negative things	--	100	--
7.	Don't know	18	--	50

20. Based on what you know or have heard, do you believe wages and benefits received by Lane Transit employees are higher, the same, or lower than for people who work in similar jobs in the private sector?

	<u>Payroll Taxpayers</u>	<u>Community Leaders</u>	<u>Elected Officials</u>
1. higher	43	71	40
2. same	25	22	40
3. lower	5	--	5
4. (DON'T READ) don't know	27	7	15

21. On issues related to the recent strike at Lane Transit, did you agree more with the union or with Lane Transit management? WAIT AND ASK: Do you feel strongly about that?

1. strongly agree with union	17	2	20
2. agree with union	11	(28)	10 (30)
3. (DON'T READ) don't know	35	22	20
4. agree with Lane Transit management	13	(37)	5 (50)
5. strongly agree with Lane Transit management	24	56	45

22. IF UNION: What is the major reason you agreed more with the union? (RECORD RESPONSE VERBATIM)

1. Need the benefits/health care coverage	21	50	17
2. Misallocation of funds by management/board	19	--	17
3. Higher cost of living/need higher wages	7	50	--
4. Union member/I'm sympathetic towards unions/union's position	7	--	--
5. More fair/people need to be treated fairly	5	--	--
6. Inability to negotiate through differences	5	--	--
7. Overpaid/under-worked/already making enough money	5	--	--
8. Negative opinion of management/trust employees/union more than management	5	--	--
9. General feeling	5	--	--
10. Management dragging their feet	2	--	--
11. Spend money on art/decorating bus stops	2	--	--
12. Management not being truthful	2	--	--
13. Valid concerns/issues	2	--	17
14. Union's position more reasonable	2	--	--
15. Lack of communication by management/board to union/employees	2	--	--

		<u>Payroll Taxpayers</u>	<u>Community Leaders</u>	<u>Elected Officials</u>
16.	What management did is wrong	--	--	17
17.	Board not confident in policies they're implementing	--	--	17
18.	Don't know	7	--	17
23.	IF LANE TRANSIT MANAGEMENT: What is the major reason you agreed more with Lane Transit management? (RECORD RESPONSE VERBATIM)			
1.	Pay/benefits were high enough/ above the norm/not in-line with private sector	35	20	20
2.	Health care costs have risen/ they're trying to control health insurance costs	9	12	10
3.	Trying to work within budget/ curb expenses/trying to make money	9	15	20
4.	Union unreasonable/too demanding/difficult to deal with	9	10	--
5.	Dislike unions	7	2	--
6.	Don't need a yearly raise/are overpaid/paid sufficiently already	7	7	10
7.	Work in management/sympathetic towards management/ management's position	4	7	10
8.	Dislike public transit	2	--	--
9.	Driver won't live long enough to make up the money	2	--	--
10.	From what I read in the paper	2	--	--
11.	Kept buses running	2	--	--
12.	Union is behind the times/out of touch	2	2	--
13.	Management knows how much money there is on hand	2	--	--
14.	Everyone's costs are increasing/ need to pay their fair share	2	10	--
15.	Stayed within the parameters of the Board of Directors	2	--	--
16.	Brought down union's demands	--	2	--
17.	Offers were fair/management offered a fair package	--	5	10
18.	In a hole they can't get out of	--	2	--
19.	Don't know	5	5	20

24. During the strike the union said Lane Transit was “building palaces at the expense of employees,” In other words, it was more concerned about capital improvements such as new buses, bus stations and bus shelters rather than employees. How important are these capital improvement projects to the community? (READ 1-4, 4-1)

		<u>Payroll Taxpayers</u>		<u>Community Leaders</u>		<u>Elected Officials</u>	
1.	very important	19		31		40	
2.	fairly important	34	(53)	35	(65)	35	(75)
3.	not too important	31	(43)	27	(31)	10	(20)
4.	not important at all	12		4		10	
5.	(DON'T READ) don't know	5		4		5	

Q25: BUSINESS LEADERS/PAYROLL TAXPAYERS ONLY

25. How many people are employed by your company?

1.	1-4	57		NA		NA
2.	5-9	23				
3.	10-19	8				
4.	20-49	7				
5.	50-99	1				
6.	100-499	1				
7.	500+	1				
8.	NA/refused	2				

26. Sample

1.	business leaders/payroll taxpayers	100		--		--
2.	community leaders	--		100		--
3.	elected officials	--		--		100

27. Gender (BY OBSERVATION)

1.	male	65		82		65
2.	female	35		18		35

28. Zip Code (FROM LIST)



MOORE INFORMATION

OPINION RESEARCH • STRATEGIC ANALYSIS

July 28, 2005

TO: Kathy Wiltz
FROM: Bob Moore & Jill Dehlin
RE: LTD Business and Opinion Leader Survey Results

Methodology

A total of 225 telephone interviews were conducted by Moore Information, Inc. among businesses and opinion leaders in the Lane Transit District, including 150 interviews among payroll taxpayers, 55 interviews among community opinion leaders and 20 among elected officials. Interviews were conducted June 27-July 15, 2005.

Overview

Businesses, opinion leaders and elected officials in the Lane Transit District believe LTD is important to the community, a good employer and rate their services highly. In addition, those with an opinion are more likely to agree with management than the union on issues related to the recent strike and rate capital improvement projects important to the community. Specifically the,

- Majorities of elected officials, opinion leaders and payroll taxpayers rate LTD very or fairly important to the community.
- There is consensus agreement among all audiences interviewed that LTD is a good place to work. Interestingly, both payroll taxpayers and opinion leaders believe wages and benefits received by LTD employees are higher than those found in the private sector, but among elected officials sentiment is divided (40% believe they're higher and 40% the same).
- Additionally, those with an opinion rate LTD highly on each of the six service-related factors tested, including cleanliness and appearance of buses, availability of information about travel on buses, convenience/ease of use of bus service, personal safety on buses and at bus stops, bus driver courtesy and on-time performance.

Though LTD gets high ratings for service-related factors, respondents are not as impressed with LTD on the following six management-related factors (with payroll taxpayers among the least impressed): keeping costs down, efficient use of taxpayer dollars, efforts to resolve strike, competence and efficiency of board, competence and efficiency of management and accountability of board. Additionally, payroll taxpayers are also more critical than opinion leaders or elected officials when evaluating LTD's overall performance.

More detailed findings follow.

Perceptions of LTD

There is consensus agreement among survey respondents that Lane Transit District is important to the people of Lane County. Fully 85% of elected officials rate LTD very or fairly important to the county, compared to just 5% who believe it is not too or not at all important. LTD is also rated important by a wide majority of community leaders (58% important, 35% not important) and payroll taxpayers (67% important, 29% not important).

Interestingly, the survey reveals that LTD is more likely to be rated important by smaller businesses than larger businesses in the area. For example, among payroll taxpayers with fewer than five employees, LTD is rated important by fully 76% and not important by just 22%, while among larger businesses (5+ employees), LTD is not as likely to be rated important (56% important, 38% not important).

Looking at overall perceptions of LTD's performance, when asked if LTD is doing an excellent, good, fair or poor job, elected officials are most impressed. Indeed, 65% rate LTD's performance excellent/good, and just 35% fair/poor. Opinion leaders are also positive, but not overwhelmingly so (53% excellent/good and 44% fair/poor), and payroll taxpayers are among the least impressed (41% of payroll taxpayers rate LTD excellent/good, while 49% rate their performance fair/poor). Payroll taxpayers with five or more employees are among the most critical of LTD (36% rate LTD's performance excellent/good and 56% fair/poor). Among payroll taxpayers with fewer than five employees, reactions are divided.

LTD Job Performance Ratings

	Payroll taxpayers	Community leaders	Elected officials
Excellent/good	41%	53%	65%
Fair/poor	49%	44%	35%
<i>Net excellent/good</i>	<i>-8%</i>	<i>+9%</i>	<i>+30%</i>

When asked to describe, in their own words, the major strength of LTD, the leading comments focused on coverage, accessibility and routes offered by LTD, while others focused on the fact that LTD provides a good alternative transportation choice and LTD is service-oriented, serving the public and providing a valuable service to community. The leading comments mentioned by each of the three groups interviewed follow. (A complete list of comments can be found in the questionnaire section of this report.)

Major Strength of LTD

	Payroll taxpayers	Community leaders	Elected officials
Good coverage/accessibility/routes/service	18%	13%	20%
Provides choice/transportation choice	17%	15%	20%
Senior/disabled services/handicap services	7%	0%	10%
Service oriented/serves public/community	4%	5%	0%
Number of buses/frequency	3%	4%	0%
Community based company/community involvement	0%	4%	5%
Don't know	23%	35%	15%

Respondents were also asked to give feedback about suggestions for improving Lane Transit. Roughly six-in-ten offered a variety of suggestions, including the following:

Suggestions for LTD

	Payroll taxpayers	Community leaders	Elected officials
Smaller buses/stop using larger buses on low ridership routes	12%	11%	5%
Operate within predetermined budget	9%	11%	5%
Shouldn't have to pay taxes on service I don't use/need	6%	2%	0%
Depend less on tax revenue	6%	2%	0%
More routes/better planned routes	5%	4%	20%
Streamline operations/eliminate routes	3%	7%	0%
Need new management/streamline mgmt.	5%	2%	0%
Lower costs/don't raise fares	2%	0%	10%
Increase ridership	1%	7%	5%
Continue/accelerate BRT project	0%	0%	15%
Board of Directors should be elected	0%	0%	15%
Don't know	31%	38%	40%

Evaluating LTD Performance

Respondents were asked to evaluate LTD's performance on 12 factors using a five-point scale, where five is excellent and one is poor. The factors focused on the performance of LTD management and overall service.

Service Factors

First looking at reactions to LTD services, we find that respondents with an opinion rate LTD highly on each of the six service factors tested, including cleanliness and appearance of buses, availability of information about travel on buses, convenience/ease of use of bus service, personal safety on buses and at bus stops, bus driver courtesy and on-time performance of buses.

Looking at the "excellent/above average" ratings (4 or 5 on 5-point scale), we find that payroll taxpayers and community opinion leaders are most impressed by the cleanliness and appearance of buses. Elected officials are most likely to rate LTD "excellent/above average" for bus cleanliness and availability of information about travel on buses. It is important to note that service factors that don't receive as high of ratings do not necessarily reveal poor performance in those areas. Rather, respondents simply weren't familiar enough to offer an opinion. For example, community opinion leaders do not rate LTD as highly on three factors: personal safety on buses/at bus stops, bus driver courtesy and on-time performance of buses. However, this is because majorities have no opinion on each, as they still are more likely to rate LTD excellent/above average on these factors.

Evaluating LTD Performance: Service Factors
 (% excellent/above average, below average/poor)

	Payroll taxpayers	Community leaders	Elected officials
Cleanliness and appearance of buses	76/5%	62/2%	70/0%
Availability of info about travel on buses	57/12%	42/15%	70/5%
Convenience/ease of use of bus service	49/18%	49/15%	55/10%
Personal safety on buses/at bus stops	49/8%	33/5%	50/5%
Bus driver courtesy	48/4%	18/11%	40/5%
On-time performance of buses	48/3%	25/0%	50/5%

Another way to compare ratings of each of the factors is by calculating mean scores (again, 1=poor and 5=excellent). As the table below shows, respondents in each of the groups with an opinion (those without an opinion are not factored into the mean score rating) rate LTD above average on each.

Evaluating LTD Performance: Service Factors
 (Mean scores)

	Payroll taxpayers	Community leaders	Elected officials
Cleanliness and appearance of buses	4.1	4.0	4.2
Availability of info about travel on buses	3.7	3.4	4.0
Convenience/ease of use of bus service	3.4	3.5	3.7
Personal safety on buses/at bus stops	3.8	3.9	4.2
Bus driver courtesy	4.0	3.3	4.1
On-time performance of buses	4.0	4.0	3.9

Management Factors

Looking at six factors rating LTD management, we find that for the most part, elected officials are more positive about LTD management than community opinion leaders or payroll taxpayers. At the same time, payroll taxpayers are least likely of the three groups to be impressed with management on each of the six factors. Among community opinion leaders, ratings are most positive for management's efforts to resolve the strike and competency and efficiency of management. The following tables show results for each of the management evaluation factors among the three audiences.

Evaluating LTD Performance: Management Factors
 (% excellent/above average, below average/poor)

	Payroll taxpayers	Community leaders	Elected officials
Efforts to resolve strike	24/33%	45/18%	45/30%
Keeping costs down	17/41%	20/49%	40/25%
Efficient use of taxpayer dollars	16/49%	24/55%	50/15%
Competence and efficiency of Board	13/33%	31/22%	45/15%
Competence and efficiency of management	13/29%	38/20%	50/20%
Accountability of Board	9/33%	24/24%	35/25%

Looking at each of the factors by mean score (again, 1=poor and 5=excellent), we find payroll taxpayers with an opinion rate LTD below average on each of the six management factors, while elected officials rate management above average on each factor. Community opinion leaders rate LTD below average on keeping costs down and efficient use of taxpayer dollars, and average or above on the other four factors.

**Evaluating LTD Performance: Management Factors
(Mean scores)**

	Payroll taxpayers	Community leaders	Elected officials
Efforts to resolve strike	2.9	3.5	3.2
Keeping costs down	2.5	2.4	3.1
Efficient use of taxpayer dollars	2.2	2.4	3.5
Competence and efficiency of Board	2.4	3.1	3.7
Competence and efficiency of management	2.6	3.3	3.5
Accountability of Board	2.3	3.0	3.2

LTD as an Employer

There is consensus agreement among each of the audiences interviewed that LTD is a good place to work. More than six-in-ten payroll taxpayers (62%), community leaders (62%) and elected officials (65%) believe LTD is a good place to work. The leading reason LTD is believed to be a good place to work is good pay and benefits, while others’ opinions are based on word-of-mouth and people they know who work there.

At the same time, there was no consensus among the few who don’t believe LTD is a good place to work (this sentiment was expressed by just 11 payroll taxpayer respondents, 1 community leader and 2 elected officials). Comments from these respondents included, “strike,” “not responsive to employees,” “their priorities are wrong,” “poorly managed,” “don’t know employees” and “heard negative things.”

Looking at other perceptions of LTD as an employer, we find widespread agreement among 71% of community opinion leaders that wages and benefits received by LTD employees are higher than what is typical for people in the private sector. Just 22% of community leaders believe pay and benefits are comparable and none would describe their benefits as lower. Among payroll taxpayers, LTD’s employee wages and benefits are also believed to be higher than those found in the private sector (43% higher, 25% same, 5% lower), but among elected officials this is not the case. While 40% of elected officials believe LTD wages and benefits are higher than in the private sector, another 40% believe there is no difference and 5% believe they receive lower pay and benefits.

The Strike

Respondents in each of the three groups surveyed are more likely to agree with Lane Transit management than the union on issues related to the recent strike. Among the most likely to side with LTD management are community leaders (75% agree with LTD and just 4% with the union), though elected officials are also more likely to side with management (50% agree with LTD vs. 30% with union). Payroll taxpayers also agree with LTD (37% LTD, 28% union), but were much less likely to have an opinion on the matter (fully 35% had no opinion either way).

Interestingly, looking at reactions among payroll taxpayers, businesses located in Eugene are more likely to side with LTD management, while businesses elsewhere in the district are divided. By employee size, those with fewer than five employees are divided, and those with five or more employees agree with LTD management.

Payroll taxpayers who agree with the union on the strike issues are most likely to say they side with the union because they agree with their arguments. There was no consensus among the few community leaders or elected officials who agree with the union. Specifically, payroll taxpayers believe there was a need for benefits/health care coverage and also that funds were misallocated by management/board. A few others siding with the union mentioned higher cost of living or are simply sympathetic to unions.

At the same time, all three groups agree with LTD management on strike issues that pay/benefits were already high enough/above the norm. Some of the other reasons for siding with LTD management on the strike mentioned by all three groups included "health care costs have risen," "trying to work within budget," "are overpaid" and "sympathetic toward management."

Capital Improvements

Majorities of payroll taxpayers, community leaders and elected officials agree that LTD's capital improvement projects, such as buses, bus stations and bus shelters are important to the community. In particular, community opinion leaders and elected officials are among the most likely to feel this way. The following table shows reactions among each of the groups.

Capital Improvements

"During the strike the union said Lane Transit was 'building palaces at the expense of employees.' In other words, it was more concerned about capital improvements such as new buses, bus stations and bus shelters rather than employees. How important are these capital improvement projects to the community?"

	Payroll taxpayers	Community leaders	Elected officials
Very/fairly important	53%	65%	75%
Not too/not at all important	43%	31%	20%
<i>Net important</i>	<i>+10%</i>	<i>+34%</i>	<i>+55%</i>

AGENDA ITEM SUMMARY

DATE OF MEETING: September 21, 2005

ITEM TITLE: WORK SESSION: OFFICE OF MEDICAL ASSISTANCE PROGRAMS
(OMAP) TRANSPORTATION BROKERAGE

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PREPARED BY: Terry Parker, Accessible Services Manager

ACTION REQUESTED: Direct staff to develop an Inter-Governmental Agreement with the Oregon Office of Medical Assistance Programs (OMAP) that outlines the mutual interests of LTD and OMAP in establishing a call center and transportation brokerage within Lane County.

BACKGROUND: The Medicaid program became law in 1965 to assist states in the provision of adequate medical care to eligible needy persons. The Oregon Department of Human Services (DHS) administers Medicaid and associated medical transportation services through the Office of Medical Assistance Program.

OMAP already has established or is in the process of developing medical transportation brokerages and regional call centers throughout the state in order to improve the level of coordination of the non-emergent medical transportation services for persons eligible for Medicaid. Under the State's model, the Broker performs Medicaid administrative activities, and OMAP provides reimbursement based on an average per-ride rate. The Broker utilizes a call center to verify client and ride eligibility and resources, verify appointments, keep track of and negotiate transportation provider costs, and assign rides based on the most appropriate and lowest cost. The brokerage must have billing and accounting services and oversee quality assurance and contract administration.

Lane County is the last area in Oregon that has yet to develop a medical transportation brokerage using the State's model. The main reason for not establishing a brokerage earlier was that Senior & Disabled Services (S&DS), a division of the Lane Council of Governments, developed its own software program and organized staff essentially to act as a call center and broker for its Medicaid clientele, which represents about 80 percent of the Medicaid medical trips that originate within Lane County. Other human service agencies manage their own Medicaid transportation, often through individual case managers.

There are two significant differences in how LCOG organizes its service and the new brokerages: (1) LCOG makes arrangements only for its own clientele rather than for all of the Medicaid recipients within Lane County, and, (2) transportation providers are paid on a fee-for-service, with the State having to negotiate rates and pay and monitor individual providers, rather than LCOG doing that work on the State's behalf.

LTD Accessible Services and LCOG Senior & Disabled Services currently are the two entities most involved in the delivery and coordination of transportation services throughout Lane County. OMAP has approached both LTD and LCOG about interest in developing a Lane County Medicaid Brokerage. Ted Stevens, director of S&DS, has declined on behalf of LCOG, leaving LTD to consider the options. OMAP has indicated that if LTD is not interested in pursuing a brokerage, a call center from one of the existing or emerging brokerages elsewhere in the state will manage Lane County services.

Potential benefits to LTD in managing a brokerage:

- Ability to "pool" both RideSource and Medicaid trips to gain efficiencies by grouping trips
- Cost sharing opportunities (for example, leasing space at RideSource facility to call center)
- Keeps management of Medicaid trips and relationships with providers local
- Creates centralized call center and automated schedule and dispatch capability

Risks include:

- Resistance by local providers
- No other brokerage within the State has yet to integrate non-Medicaid trips (such as RideSource)
- Cost competition promotes low cost over quality service
- Time-consuming project that is slow to show cost savings results
- Average per-ride rate must be adequate for reimbursement to cover all costs

ATTACHMENTS: Coordinated Transportation Organization Chart

PROPOSED MOTION: None; for discussion and direction only

Final Measure Status Report

For Oregon Transit Association

HB 2048

Restores cigarette tax dedicated to Oregon Health Plan.

Dead

HB 2163

Prohibits city, county, district or other political subdivision from imposing taxes, fees or driver or vehicle standards related to intrastate and intercity route of provider of regular route full-service scheduled transportation of persons.

Dead

HB 2164

Adds two members to Oregon Transportation Commission.

Dead

HB 2165

Creates Local Officials Advisory Committee to advise Oregon Transportation Commission and Department of Transportation.

Dead

HB 2240

Provides that specified percentage of agency's General Fund balance that is unobligated at end of biennium may be distributed to employees.

Dead

HB 2502

Requires school buses and school activity vehicles to be equipped with safety belts.

Dead

HB 2555

Establishes Oregon Project Independence Fund.

Dead

HB 2587

Establishes Oregon Project Independence Fund consisting of specified moneys.

Dead

HB 2608

Requires person to provide proof of legal presence and federal identification number before person can receive, renew or replace driver license, driver permit or identification card.

Dead

HB 2626

Establishes Oregon Project Independence Fund.

Dead

HB 2645

Requires nongovernment organizations that receive state tax moneys to post notice indicating that services are funded by taxpayers of Oregon.

Dead

HB 2807

Authorizes for-hire carriers and private carriers to operate vehicles with combined weight of 16,000 pounds or less in high occupancy vehicle lane if displaying high occupancy vehicle use permit in rear window or on rear bumper.

Dead

HB 2811

Expands types of equipment or devices that may not be used in motor vehicle when vehicle is driven or moved on highway.

Governor signed 7/20

HB 2867

Directs cities to distribute ___ percent of moneys received by cities from violations of laws and ordinances related to parking privileges for disabled persons to organizations that serve persons with disabilities.

Dead

HB 2886

Adds representative of international transportation business to membership of International Trade Commission.

Dead

HB 2891

Reimposes tax on distribution of cigarettes.

Dead

HB 2897

Creates Task Force on Extending Washington County Commuter Rail to Salem.

Dead

HB 2932

Creates Department of Veterans Affairs to administer federal and state laws relating to veterans.

Governor signed 7/22 *Veterans Department Budget HB 5109*

HB 2940

Increases cigarette tax.

Dead

HB 3024

Provides that moneys available for use to establish highway modernization program may also be used to operate program.

Dead

HB 3113

Appropriates moneys from General Fund to Employment Department to be used for certain transportation needs of veterans.

Dead

HB 3414

Requires Department of Transportation to report to interim committee on funding options for highway projects of statewide significance.

Dead

HB 3415

Requires that bond proceeds earmarked but not spent by Department of Transportation for replacement or repair of bridges instead be spent on highway projects of statewide significance and freight projects.

Governor Signed 7/7

Effective date January 1, 2006

HB 3481

Creates or expands tax incentives for production facilities producing ethanol, biofuel or certain fuel additives, for agricultural production of biofuel raw materials or biomass used for certain energy production and for certain biofuel or biomass conversion pollution control facilities.

Dead

HB 3489

Modifies Oregon Project Independence.

Dead (*See SB 870*)

HB 5069

Appropriates moneys from General Fund to Department of Transportation for certain biennial expenses.

Dead

HB 5070

Approves certain new or increased fees adopted by Department of Transportation.

Dead

SB 71

Authorizes issuance of lottery bonds for transportation projects.

Passed

SB 235

Requires places of public accommodation to remove barriers and provide auxiliary aids and services when necessary to provide disabled persons access to goods, services and facilities offered by places of public accommodation.

Dead

SB 259

Permits boards of directors of nonprofit corporations to use electronic means to meet and to make decisions.

Governor Signed 6/14

SB 319

Modifies criteria used by arbitrators in public collective bargaining.

Dead

SB 324

Removes exception requiring confidentiality under certain conditions for terms of settlement or compromise of action involving public body and terms of mediation agreement involving public body.

Governor Signed 7/11; Effective date, January 1, 2006

SB 367

Requires drivers and passengers in privately owned commercial vehicles designed and used to transport 15 or fewer persons to use safety belts.

Governor Signed 6/29 Effective date, January 1, 2006

SB 426

Requires public employer, when no labor organization has been certified or recognized as exclusive representative of group of employees, to recognize labor organization that represents at least majority of unrepresented employees if labor organization or employees present public employer with signed authorization cards for union representation from at least majority of affected employees.

Dead

SB 448

Exempts from motor carrier laws vehicles used for public transportation purposes approved by district school board, vehicles used in transportation of persons for hire by nonprofit entity regardless of distance traveled and government vehicles owned or operated as carriers of persons for hire.

Governor Signed 6/21

SB 558

Requires election of members of boards of directors of certain mass transit districts situated in standard metropolitan statistical areas with populations of 400,000 or fewer individuals.

Dead

SB 566

Prohibits Oregon Transportation Commission from designating specified parts of Oregon Route 126 or U.S. Route 101 as freight routes.

Dead

SB 610

Requires public body to conduct collective bargaining in public.

Dead

SB 777

Establishes Multimodal Transportation Fund to make loans to public bodies and private entities for transportation projects.

Dead

SB 778

Dedicates certain cigarette tax revenues to certain rural health safety net programs and services.

Dead

SB 806

Expands definition of public body under Oregon Tort Claims Act to include private, nonprofit organizations that provide public transportation services if more than 50 percent of funding for purpose of providing services is received from governmental bodies.

Governor Signed 8/10 Effective date, January 1, 2006

SB 839

Extends period during which property tax exemptions for multiple-unit housing may be granted.

Governor Signed 6/14

SB 865

Requires Department of Transportation to conduct state highway system study for Portland metropolitan area.

Dead

SB 870

Establishes Oregon Project Independence Fund consisting of moneys paid to fund by Department of Human Services and transferred to fund from Senior Property Tax Deferral Revolving Account.

Governor signed 8/17

SB 897

Declares statewide land use planning goals relating to transportation planning advisory only.

Dead

SB 975

Prohibits certain recipients of state funds from using state funds to assist, promote or deter union organizing.

Dead

SB 992

Directs President of Senate and Minority Leader of Senate to appoint Executive Appointments Administrator.

Dead

SB 5532

Increases amount of lottery bonds authorized to be issued by Economic and Community Development Department.

Passed

SB 5547

Appropriates moneys from General Fund to Department of Transportation for certain biennial expenses.

Governor signed 8/17

AGENDA ITEM SUMMARY

DATE OF MEETING: September 12, 2005

ITEM TITLE: ANNUAL STRATEGIC PLANNING WORK SESSION

PREPARED BY: Ken Hamm, General Manager
Mark Pangborn, Assistant General Manager

ACTION REQUESTED: Preliminary discussion of agenda topics

BACKGROUND: Staff request that the Board begin providing input regarding the agenda for the Board's annual strategic planning work session, to be held on December 9 and 10, 2005. This is intended to be a brief discussion to gather preliminary suggestions. A more detailed discussion about the strategic planning session will be scheduled for the September 21 regular meeting.

ATTACHMENT: None

PROPOSED MOTION: None