



**LANE TRANSIT DISTRICT
AD HOC FARE POLICY MEETING**

**Monday, August 27, 2018
5:30 p.m.**

LTD BOARD ROOM

3500 E. 17th Avenue, Eugene (in Glenwood)

AGENDA

- | Time | | |
|-----------|------|---|
| 5:30 p.m. | I. | WELCOME AND INTRODUCTIONS |
| 5:40 p.m. | II. | PURPOSE
<i>Staff will provide a description of the purpose of this meeting and the committee that is to be formed.</i> |
| 5:50 p.m. | III. | REVIEW OF LTD'S CURRENT FARE POLICY
<i>Lane transit district's current fare policy will be provided for review and discussion.</i> |
| 6:10 p.m. | IV. | PROCESS FOR DEVELOPING A RECOMMENDATION
<i>Discussion will be held to determine the process of evaluating LTD's fare policy and the most effective process to develop a policy recommendation.</i> |
| 6:30 p.m. | V. | TIMELINE AND FUTURE MEETINGS' SCHEDULE
<i>Discussion will be held regarding the timeline, number, and structure of future meetings.</i> |
| 6:45 p.m. | VI. | ADJOURNMENT |

Lane Transit District Fare Policy

The fare policy is used to provide direction in making decisions about changes in the District's fare structure. The policy is composed of objectives and guidelines. The objectives indicate the general goals the District's fare structure should achieve. The guidelines provide more specific direction on the various aspects of a fare structure. The intent of each of the guidelines is further explained in a discussion section that follows each statement.

This Fare Policy applies to both the fixed-route and paratransit (RideSource) systems. Unless otherwise stated, objectives and guidelines apply to both systems.

OBJECTIVES

1. To promote fixed-route ridership by making the fare structure attractive to users
2. To improve the farebox recovery ratio
3. To improve the efficiency of fare collection
4. To promote equity of fare payment among patrons

APPLICATION

This policy applies to all recommendations for changes to the fare structure.

GUIDELINES

1. Recommendations for changes in the fare will be developed by LTD staff. LTD Staff will work with the Board Finance Committee to develop a recommendation for review by the LTD Board of Directors. The LTD Board of Directors will change fares through an amendment of the LTD fare ordinance, which requires a series of public hearings. Changes to the RideSource fare also will include review by the Accessible Transportation Committee.
 - a. Typically, fare change decisions are made over the course of three Board meetings. At the first meeting, an informational presentation to the Board and a public hearing are held. The first reading of the ordinance is held at the second meeting, and the second reading and approval of the fare ordinance occur at the third meeting.
2. *When considering changes to the fare, the Board will consider:*
 - *The effects of the change on Title VI populations*
 - *The inflation rate*
 - *Ridership and revenue trends*
 - *Local economic trends*
 - *Trends in automobile-related costs such as gas*
 - *Service changes*
 - *Economic impact on customers*
 - *Market conditions and opportunities*

- *The District's financial situation*
 - *The District's goals and objectives*
3. This policy statement lists the most important factors to be considered in making recommendations for changes to the fare structure. The list of factors to be evaluated is not meant to be exclusive; other factors may need to be considered from year to year.
 4. Increases or decreases in fares on certain transit modes or by fare payment type or payment media will be analyzed using any available information generated from ridership surveys, indicating whether minority or low income riders are more likely to use the mode of service, payment type, or payment media that would be subject to the fare increase. This analysis will be summarized in a fare equity report and staff will provide this report to the Board of Directors at a regularly scheduled Board meeting.
 5. Increases to the Group Pass rates will be based on guidelines included in the Group Pass section of this policy.
 6. The RideSource fare should exceed the fare of the fixed-route system to reflect the higher cost of a RideSource trip and to encourage use of the fixed-route system when possible.

RideSource, a demand-responsive, curb-to-curb service, has a much higher cost per trip than LTD's fixed-route service. Establishing a higher cash fare for RideSource than for the fixed-route system will help to compensate for the higher cost and encourage riders who may have a choice between systems to use the fixed-route service. By law, RideSource fares cannot exceed twice the regular fixed-route cash fare.

7. Recognizing that increases in fares can have a negative impact on ridership, increases in the farebox recovery ratio should be pursued primarily by improving the ridership productivity of the system and by improving internal operating efficiency.

There are three ways to improve farebox recovery ratio: by increasing the fare (in real terms); by improving internal operating efficiency; and by improving ridership productivity. Attempts on the LTD fixed route to improve the recovery ratio by increasing the fare by an amount substantially greater than the inflation rate have proven unsatisfactory. Ridership decreases have almost offset the increase in the average fare, yielding only small gains in revenue and significant ridership loss. Improvements in internal operating efficiency should be pursued whenever possible. Improvements in ridership productivity are likely to provide the greatest potential for a significant improvement to the farebox recovery ratio. If the average fare remains stable (in real terms), a 10 percent increase in ridership productivity would achieve a 10 percent improvement in the farebox recovery ratio.

Unlike the fixed-route system, significant increases in RideSource rides do not provide significant additional income to offset costs. Encouraging use of the RideSource Shopper and providing incentives for grouping trips may improve productivity but would not have a substantial impact on the farebox recovery ratio. Due to the significant fare subsidy on RideSource, efforts should be made to maintain a minimum farebox recovery ratio including collaboration with local social service agencies and charging the Americans with Disabilities Act (ADA) maximum allowable cash fare.

8. Prepayment of fares on the fixed-route system shall be encouraged. Accordingly, passes should be priced below the cash fare.

Prepayment of fares benefits the District in a number of ways: It improves the cash flow situation; it guarantees ridership and revenue by the customer; it reduces the chance of non-payment or underpayment; and it speeds boarding. Prepayment mechanisms also tend to

encourage increased ridership by customers since the cost of the ride is not required at the time the decision to take the ride is made. It is recommended that monthly passes be priced at 25 to 30 times the cash fare. It should be noted that RideSource does not use passes since there should not be an incentive to ride RideSource more frequently. However, RideSource provides ticket books for riders to encourage ease of boarding for customers, and to offer a non-cash alternative to riders.

9. Increases to the base fixed-route fare generally should not exceed 10 percent within a year and changes should be rotated by fare category.

This policy directs that changes in the fare be incremental in nature to avoid large "catch-up" increases. The District's experience has been that large fare increases (even though occurring less often) have a substantially more negative impact on ridership than smaller, more frequent fare increases. Additionally, rotating fare increases by fare type allows customers to choose a fare type that is not increasing in cost that year.

LTD will charge the ADA maximum fare of twice the fixed-route adult cash fare for RideSource service. Additional fare increases would occur only when the LTD adult cash fare increases.

Recommendations for fare changes will be developed prior to the budget process each spring for the following fiscal year.

Given the dynamic nature of ridership, budgets, and other factors that affect fares, it is necessary to consider changes in the fare on a yearly basis. This policy ties the recommendations on fare changes to the budget process, as well as to decisions on major changes in the service that result from the Annual Route Review. This policy does not preclude making unprogrammed changes to the fare in mid-year if unforeseen conditions warrant.

10. Changes in the fare structure should be implemented on the first day of a month, preferably in July or September.

Since LTD ridership changes significantly at the start and end of summer, these are good times to implement changes to fares. Pass price increases during the school year when LTD ridership is highest are more visible and therefore may result in a greater loss of ridership.

11. Fare promotions can be used to attract new riders to the system.

Fare promotions may be single day fare adjustments or longer term promotions that achieve both promotional and operational outcomes.

Fare promotions have shown to be a cost-effective method of attracting new users to the system at a very low cost per trip. Surveys indicate that many of those attracted by free or reduced fares are not regular bus riders. The process to be followed in fare promotions includes an analysis of the proposal, a marketing plan for the promotion, and a post-project evaluation. The extent of the analysis, marketing plan, and evaluation would be based on the scale of the promotion. RideSource fare promotions shall be designed to transition riders to the LTD fixed route and to increase RideSource productivity.

12. Discounted fares may be used to encourage ridership during traditionally low-demand periods.

The District has had very good success in generating additional ridership in low-demand times through fare reductions. The cost per trip generated by the fare reductions has been much lower than for other options available to the District.

13. Fare payment options that effectively attract a different market segment or encourage increased use of the bus by current riders shall be developed. The fare payment options should be made conveniently available to customers.

The District currently offers customers the choice of paying cash, purchasing a day pass from the bus operator, or purchasing a 10-ride ticket book, or purchasing monthly passes or three-month passes. Each of these fare payment options is attractive to a different segment of the market. Other fare payment options that attract additional riders, increase bus use among current riders, or are more convenient forms of current options should be investigated and, if feasible, implemented. Convenient access to all fare payment options will tend to make the system more attractive to customers and thus will increase ridership.

14. The design and number of fare payment instruments shall consider the ease of enforcement by bus operators and ease of understanding by customers.

Bus operator enforcement of fares is necessary to ensure adherence by customers to the fare policies. The ease of enforcement is dependent upon the design of the fare payment instrument and the quantity of different fare payment options available. These two factors should be considered when making decisions on the implementation of a new fare option or the redesign of an existing fare instrument. Fare enforcement programs should be evaluated periodically to ensure that they are appropriate.

MAINTENANCE

The Customer Services and Planning Department will monitor application of this policy as it relates to cash fares, and standard passes, and propose revisions as necessary.

ATTACHMENTS: FARE MEDIA DONATIONS GUIDELINES
FARE DISCOUNTS (PRIVATE NON-PROFIT AGENCY PROGRAM) GUIDELINES
WHOLESALE DISCOUNTS GUIDELINES
GROUP PASS PROGRAM GUIDELINES
EZ ACCESS PROGRAM GUIDELINES

REVISED: 4/18/01
3/17/04
4/20/05
1/18/06
9/21/11
12/19/12
8/8/18

Fare Media Donations

OBJECTIVE

The District offers fare discounts for purposes of joint marketing promotions and to support community activities. Donations will occur in the form of fare media and gift certificates. Examples include gift certificates to local school fundraising events and the donation of bus passes to organizations. (For example, Mobility International USA, that hosts delegates who come to our community to learn about accessibility.)

APPLICATION

The following guidelines apply to all fare media donations.

PROGRAM GUIDELINES

Donations of both fare media and gift certificates will be handled through LTD Customer Services. Any community group may request a donation. The LTD Director of Service Planning, Accessibility, and Marketing or the Customer Services Supervisor will review the request and determine the benefit to the District. Upon approval, the Customer Services staff or Marketing and Communications secretary will issue a certificate or the appropriate fare media. Authorization for free fare media must be given in writing (email), by the Customer Services Supervisor or an LTD department director. Requests for fare media to be used for internal employee displays may be authorized by an LTD Marketing Representative.

MAINTENANCE

The Customer Services and Planning Director is responsible for a semi-annual report of donations. This report will be forwarded to the LTD General Manager for review.

Fare Discounts

Private Not-for-Profit Agency Program

OBJECTIVE

The District offers private not-for-profit agencies the opportunity to purchase LTD fare media at a 50 percent discount. This discount is granted in recognition of a community need for transportation services for low-income individuals and families who are working with an agency(s) to seek employment, housing, and medical services.

APPLICATION

This policy applies to any private not-for-profit [IRC 501(c)(3) and IRC 501(c)(19)] agency.

PROGRAM GUIDELINES

1. Agencies must complete the program application and return it to LTD Finance. An annual certification must be signed by each participating agency. Once certified, agency staff place fare media orders by contacting emailing orders to ar@ltd.org or faxing orders to LTD Finance staff at 682-6188.
2. Agencies with more than one program or location are required to place a single order for all programs or locations.
3. LTD will invoice agencies for purchases. LTD will not process orders for agencies who are behind in paying an invoice,
4. All orders will be mailed to agencies within two business days. Orders for monthly passes should be submitted to LTD prior to the 25th of the month to ensure delivery prior to the first day the passes become valid.
5. Agencies are eligible for a 50 percent discount toward the purchase of 10-Ride Ticket books or monthly passes. .
6. The amount of fare media available will be established on an annual basis. The program limit will be up to \$80,000.00 in LTD's fiscal year (July 1 – June 30). The cap may be raised by approval of the LTD Board of Directors.
7. Fare media purchased by agencies must be distributed free of charge to clients and are not to be resold.
8. Agencies will not direct their program participants to the LTD Customer Service Center for the purchase of discounted fares.
9. LTD does not process refunds or exchanges for fare media purchased.

MAINTENANCE

The Customer Services and Planning Director is responsible for monitoring and making recommendations for modifications to this policy. An annual report of program use will be forwarded to the LTD General Manager for review.

Revised 3/06
Revised 9/06
Revised 06/09
Revised 12/19/12

Wholesale Discounts

OBJECTIVE

The District offers private retail sales outlets and public agencies a wholesale discount on the purchase of fare media. This discount recognizes that these organizations play an important role in the distribution of fare media to LTD customers.

APPLICATION

This policy applies to all private retail outlets that LTD chooses to contract with for the sales of fare media. All public agency purchases will be issued according to the same discount structure.

PROGRAM GUIDELINES

LTD offers a 5 percent discount on the purchase of fare media for private retail sales outlets who purchase fare media for their customers. Monthly passes will be consigned.

MAINTENANCE

The Service Planning, Accessibility, and Marketing Department Director is responsible for monitoring and making recommendations for modifications to the wholesale discount program.

Adopted 2/85
Revised 6/86
Revised 6/87
Revised 2/98
Revised 2/01
Revised 1/02

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GROUP PASS PROGRAM

OBJECTIVES

A Group Pass Program is one in which the cost of transit fares is shared by a group. All persons within the group receive the transit benefit whether or not they actually use the service. The employer enters into a contract for services with LTD. In this way, the cost per person for the service is significantly reduced, and ridership within the group can be expected to increase significantly.

Group pass programs attempt to:

1. Increase ridership and ridership productivity (rides per service hour) by encouraging transit and other mode use as an alternative to drive-alone automobile use and to provide convenient, effective, and efficient public transportation services to all group pass participants;
2. Reduce parking demand, traffic congestion, and auto emissions problems in the community;
3. Maintain or increase LTD's farebox to operating cost ratio; and
4. Decrease LTD's cost per trip.

The establishment of these programs is based on the premise that increased use of transit, as a replacement to the single-occupancy vehicle, is a goal established by our community because it will provide numerous benefits. In order to meet that goal, LTD should aggressively pursue fiscally responsible programs that increase use of the bus, particularly in areas with traffic congestion, parking or air quality problems, or where there is a transportation need that can be effectively addressed with public transit.

APPLICATION

The following guidelines apply to all group pass programs established by the District.

PROGRAM GUIDELINES

Qualifying Organizations

The District will consider any organization, public or private, for a group pass program if it:

1. Consists of employees, students, or residents of a multi-unit residential facility who have an ongoing transit need that requires them to make multiple trips each week to and from a specific destination. Lane Transit District reserves the right to determine whether the transit-related needs of an organization qualify it to participate in the Group Pass Program.
2. Includes at least 10 individuals.
3. Is financially capable and legally empowered to enter into a contract with LTD and meet the financial obligations dictated by that contract. The group pass program will apply to all members in the organization.
4. LTD will consider qualifying organizations on a first-come/first-served basis, only if LTD has the service and equipment capacity to serve that organization.

Pricing

Revenue from organizations that participate in the group pass programs will be computed according to whether or not an organization contributes to the LTD payroll tax and to group size. All organizations participating in the group pass program will provide revenue that meets the following two criteria:

1. A base rate per employee per month will be levied on individuals within the organization. The base rate will be increased annually, not to exceed, the three-year rolling average of LTD cost increases. The base rates are:

Taxpayers	\$5.42 per employee per month
Non Taxpayers	\$6.50 per employee per month

Rates effective January 1, 2018. Current rates are available in annual pricing plan summary.

2. The cost of additional service that is instituted by the District to directly respond to increased ridership resulting from the group pass program.
3. Participating Group Pass organizations shall not, in any manner or form, charge their employees, students or residents a fee for a Group Pass which is greater than the fee paid by the organization to Lane Transit District for the Group Pass without the express written consent of Lane Transit District.

Term of the Contract

Contracts will normally be for a one-year period, with annual renewals. Yearly evaluation, at a level appropriate for the size of the organization, is to be conducted of each group pass program prior to renewing the contract to determine if the pricing criteria are still being satisfied. The District reserves the right to terminate group pass contracts within the contract period.

Whenever possible, the District will seek to have the group pass programs institutionalized in order to reduce the possibility of programs becoming discontinued from one year to the next. This is obviously of greatest concern with the larger group pass programs, which require significant capital and operational investment and expenditures.

Operational Issues

Group pass participants are to have photo identification that is easily verified by the bus driver. The photo identification may be either the organization's, in which case it must have an LTD validating sticker, or issued by the District. In either case, the cost of issuing the photo identification will be borne by the organization. Participating organizations will be responsible for administering the program within their organizations.

Marketing

The District will provide trip planning assistance for the individuals of a group pass organization. Marketing of the service to individuals of a group pass organization will be conducted where it is determined to have a significant impact on ridership.

Maintenance

The Director of Customer Services and Planning is responsible for monitoring and making recommendations for modifications to this program.

REVISED 8/8/18

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EZ Access Program

OBJECTIVE

To provide reduced fares for seniors and people with disabilities in cooperation with the Federal Transit Administration's half-fare requirements.

APPLICATION

This program applies to all qualified individuals who are eligible according to the guidelines contained in the EZ Access program.

PROGRAM GUIDELINES

LTD's EZ Access program provides free fares to customers age 65 and older, and half-price discounted bus fares to customers with disabilities.

Who qualifies for the half-fare program?

1. Medicare cardholders
2. Persons who receive Supplemental Security Income (SSI), *based on disability*, or Social Security Disability (SSD) benefits, as long as they continue to receive these benefits
3. Veterans who are disabled, who receive a determination of at least 50 percent permanent disability or a non-service connected pension as determined through the Veterans Administration
4. People who meet the Federal Transit Administration's (FTA)¹ definition of disabled: *"disabled persons means any individual who, by reason of illness, injury, age, congenital malfunction, or other permanent or temporary disability, are unable, without special facilities or special planning or design to utilize mass transportation and services as effectively as persons who are not so affected."* See page 4 for special assistance categories.

What do I need to have to show that I qualify?

Eligibility: These following proofs will qualify you for the program:

1. Medicare card
2. Official verification of age (valid driver's license, passport, State ID card)
3. Letter of Authorization that you receive Supplemental Security Income (SSI) or Social Security Disability (SSD) benefits
4. Letter of Authorization signifying eligibility for participation in programs established specifically for people with disabilities through Lane County Developmental Disabilities Services, Lane County Mental Health, Senior & Disabled Services, or Vocational Rehabilitation.
5. Verification of eligibility for local Projects for Assistance in Transition from Homelessness (PATH) or Homeless Outreach Projects and Evaluation (HOPE)
6. Verification that you receive benefits from the Veterans Administration at a 50 percent disability level or greater, or receive a disability pension from the VA

Disability Verification: If you do not have proof of eligibility listed, then you need to verify that your disability requires *special facilities or special planning or design to utilize mass transportation* by

¹ FTA is a department of the United States Department of Transportation

completing the section (page 2) of the application.

MAINTENANCE

The Accessible and Customer Services Manager is responsible for monitoring and making recommendations for modifications to the half-fare program.

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The District offers private not-for-profit agencies the opportunity to purchase LTD fare media at a 50 percent discount. This discount is granted in recognition of a community need for transportation services for low-income individuals and families who are working with an agency(s) to seek employment, housing, and medical services.

APPLICATION

This policy applies to any private not-for-profit [IRC 501(c)(3) and IRC 501(c)(19)] agency.

PROGRAM GUIDELINES

1. Agencies must complete the program application and return it to LTD Finance. An annual certification must be signed by each participating agency. Once certified, agency staff place fare media orders by contacting emailing orders to ar@ltd.org or faxing orders to LTD Finance staff at 682-6188.
2. Agencies with more than one program or location are required to place a single order for all programs or locations.
3. LTD will invoice agencies for purchases. LTD will not process orders for agencies who are behind in paying an invoice,
4. All orders will be mailed to agencies within two business days. Orders for monthly passes should be submitted to LTD prior to the 25th of the month to ensure delivery prior to the first day the passes become valid.
5. Agencies are eligible for a 50 percent discount toward the purchase of 10-Ride Ticket books or monthly passes. .
6. The amount of fare media available will be established on an annual basis. The program limit will be up to \$80,000.00 in LTD's fiscal year (July 1 – June 30). The cap may be raised by approval of the LTD Board of Directors.
7. Fare media purchased by agencies must be distributed free of charge to clients and are not to be resold.
8. Agencies will not direct their program participants to the LTD Customer Service Center for the purchase of discounted fares.
9. LTD does not process refunds or exchanges for fare media purchased.

MAINTENANCE

The Customer Services and Planning Director is responsible for monitoring and making recommendations for modifications to this policy. An annual report of program use will be forwarded to the LTD General Manager for review.

Revised 3/06
Revised 9/06
Revised 06/09
Revised 12/19/12

Wholesale Discounts

OBJECTIVE

The District offers private retail sales outlets and public agencies a wholesale discount on the purchase of fare media. This discount recognizes that these organizations play an important role in the distribution of fare media to LTD customers.

APPLICATION

This policy applies to all private retail outlets that LTD chooses to contract with for the sales of fare media. All public agency purchases will be issued according to the same discount structure.

PROGRAM GUIDELINES

LTD offers a 5 percent discount on the purchase of fare media for private retail sales outlets who purchase fare media for their customers. Monthly passes will be consigned.

MAINTENANCE

The Service Planning, Accessibility, and Marketing Department Director is responsible for monitoring and making recommendations for modifications to the wholesale discount program.

Adopted 2/85
Revised 6/86
Revised 6/87
Revised 2/98
Revised 2/01
Revised 1/02

Q:\REFERENCE\BOARD PACKET\...\FARE POLICY.DOC
Q:\REFERENCE\BOARD PACKET\2001\02\REGULAR MEETING\FARE POLICY REVISED.DOC
Q:\Reference\Board Packet\2002\01\Regular Mtg\fare policy.doc

GROUP PASS PROGRAM

OBJECTIVES

A Group Pass Program is one in which the cost of transit fares is shared by a group. All persons within the group receive the transit benefit whether or not they actually use the service. The employer enters into a contract for services with LTD. In this way, the cost per person for the service is significantly reduced, and ridership within the group can be expected to increase significantly.

Group pass programs attempt to:

1. Increase ridership and ridership productivity (rides per service hour) by encouraging transit and other mode use as an alternative to drive-alone automobile use and to provide convenient, effective, and efficient public transportation services to all group pass participants;
2. Reduce parking demand, traffic congestion, and auto emissions problems in the community;
3. Maintain or increase LTD's farebox to operating cost ratio; and
4. Decrease LTD's cost per trip.

The establishment of these programs is based on the premise that increased use of transit, as a replacement to the single-occupancy vehicle, is a goal established by our community because it will provide numerous benefits. In order to meet that goal, LTD should aggressively pursue fiscally responsible programs that increase use of the bus, particularly in areas with traffic congestion, parking or air quality problems, or where there is a transportation need that can be effectively addressed with public transit.

APPLICATION

The following guidelines apply to all group pass programs established by the District.

PROGRAM GUIDELINES

Qualifying Organizations

The District will consider any organization, public or private, for a group pass program if it:

1. Consists of employees, students, or residents of a multi-unit residential facility who have an ongoing transit need that requires them to make multiple trips each week to and from a specific destination. Lane Transit District reserves the right to determine whether the transit-related needs of an organization qualify it to participate in the Group Pass Program.
2. Includes at least 10 individuals.
3. Is financially capable and legally empowered to enter into a contract with LTD and meet the financial obligations dictated by that contract. The group pass program will apply to all members in the organization.
4. LTD will consider qualifying organizations on a first-come/first-served basis, only if LTD has the service and equipment capacity to serve that organization.

Pricing

Revenue from organizations that participate in the group pass programs will be computed according to whether or not an organization contributes to the LTD payroll tax and to group size. All organizations participating in the group pass program will provide revenue that meets the following two criteria:

1. A base rate per employee per month will be levied on individuals within the organization. The base rate will be increased annually, not to exceed, the three-year rolling average of LTD cost increases. The base rates are:

Taxpayers	\$5.42 per employee per month
Non Taxpayers	\$6.50 per employee per month

Rates effective January 1, 2018. Current rates are available in annual pricing plan summary.

2. The cost of additional service that is instituted by the District to directly respond to increased ridership resulting from the group pass program.
3. Participating Group Pass organizations shall not, in any manner or form, charge their employees, students or residents a fee for a Group Pass which is greater than the fee paid by the organization to Lane Transit District for the Group Pass without the express written consent of Lane Transit District.

Term of the Contract

Contracts will normally be for a one-year period, with annual renewals. Yearly evaluation, at a level appropriate for the size of the organization, is to be conducted of each group pass program prior to renewing the contract to determine if the pricing criteria are still being satisfied. The District reserves the right to terminate group pass contracts within the contract period.

Whenever possible, the District will seek to have the group pass programs institutionalized in order to reduce the possibility of programs becoming discontinued from one year to the next. This is obviously of greatest concern with the larger group pass programs, which require significant capital and operational investment and expenditures.

Operational Issues

Group pass participants are to have photo identification that is easily verified by the bus driver. The photo identification may be either the organization's, in which case it must have an LTD validating sticker, or issued by the District. In either case, the cost of issuing the photo identification will be borne by the organization. Participating organizations will be responsible for administering the program within their organizations.

Marketing

The District will provide trip planning assistance for the individuals of a group pass organization. Marketing of the service to individuals of a group pass organization will be conducted where it is determined to have a significant impact on ridership.

Maintenance

The Director of Customer Services and Planning is responsible for monitoring and making recommendations for modifications to this program.

REVISED 8/8/18

Q:\Reference\Board Packet\2006\03\Regular Meeting\GPP 2006 proposed revisions.doc

Q:\Reference\Board Packet\2001\04\Regular Meeting\fare policy.doc

Q:\Reference\Board Packet\2002\01\Regular Mtg\fare policy.doc

EZ Access Program

OBJECTIVE

To provide reduced fares for seniors and people with disabilities in cooperation with the Federal Transit Administration's half-fare requirements.

APPLICATION

This program applies to all qualified individuals who are eligible according to the guidelines contained in the EZ Access program.

PROGRAM GUIDELINES

LTD's EZ Access program provides free fares to customers age 65 and older, and half-price discounted bus fares to customers with disabilities.

Who qualifies for the half-fare program?

1. Medicare cardholders
2. Persons who receive Supplemental Security Income (SSI), *based on disability*, or Social Security Disability (SSD) benefits, as long as they continue to receive these benefits
3. Veterans who are disabled, who receive a determination of at least 50 percent permanent disability or a non-service connected pension as determined through the Veterans Administration
4. People who meet the Federal Transit Administration's (FTA)¹ definition of disabled: *"disabled persons means any individual who, by reason of illness, injury, age, congenital malfunction, or other permanent or temporary disability, are unable, without special facilities or special planning or design to utilize mass transportation and services as effectively as persons who are not so affected."* See page 4 for special assistance categories.

What do I need to have to show that I qualify?

Eligibility: These following proofs will qualify you for the program:

1. Medicare card
2. Official verification of age (valid driver's license, passport, State ID card)
3. Letter of Authorization that you receive Supplemental Security Income (SSI) or Social Security Disability (SSD) benefits
4. Letter of Authorization signifying eligibility for participation in programs established specifically for people with disabilities through Lane County Developmental Disabilities Services, Lane County Mental Health, Senior & Disabled Services, or Vocational Rehabilitation.
5. Verification of eligibility for local Projects for Assistance in Transition from Homelessness (PATH) or Homeless Outreach Projects and Evaluation (HOPE)
6. Verification that you receive benefits from the Veterans Administration at a 50 percent disability level or greater, or receive a disability pension from the VA

Disability Verification: If you do not have proof of eligibility listed, then you need to verify that your disability requires *special facilities or special planning or design to utilize mass transportation* by

¹ FTA is a department of the United States Department of Transportation

completing the section (page 2) of the application.

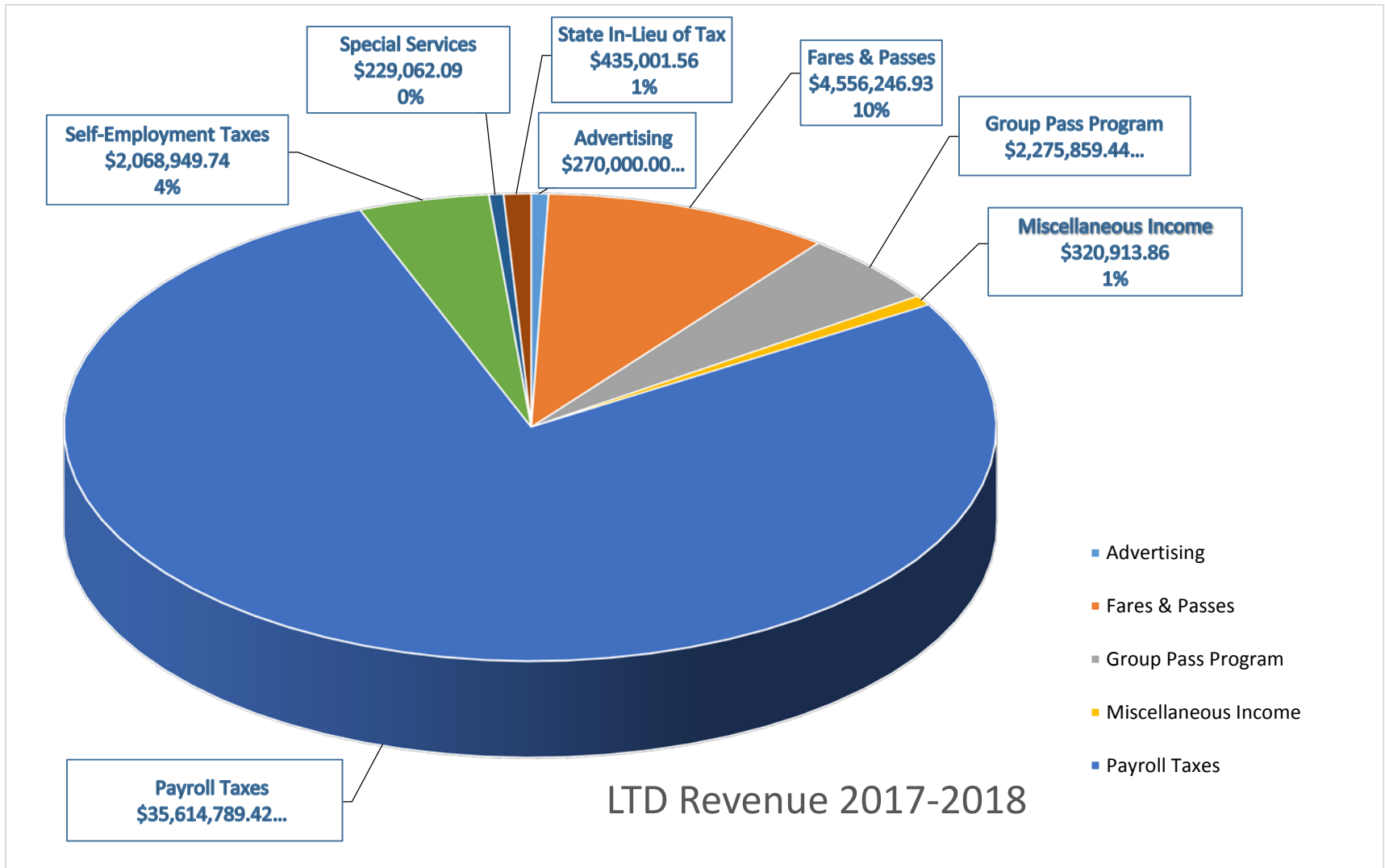
MAINTENANCE

The Accessible and Customer Services Manager is responsible for monitoring and making recommendations for modifications to the half-fare program.

LTD Fare Revenue Breakdown

Revenue Status Report		8/15/2018 03:53 PM
07/01/2017 - 06/30/2018		
010 General Fund		
Account Number		YTD Revenues
41010	Farebox Cash	\$ 1,429,639.60
41011	Ticket Vending Machine (TVM) Fares	\$ 314,860.88
41012	Farebox replacement	\$ 3,149.60
41015	Football fares	\$ 98,970.71
41019	GSC NSF payments and fees	-
41020	Monthly Passes	\$ 2,175,773.00
41022	Pass replacement	\$ (1,018.50)
41025	LCC Term Pass	-
41026	Student Transit Pass	-
41034	Contract - 3 month	\$ 313,290.00
41035	Passes-3mo Flash	-
41038	Misc. Pass Sales	\$ 22,890.00
41039	Annual passes	\$ 144,736.12
41040	Day Passes	\$ 18,997.85
41041	Day Pass Ticket Books	\$ 1,211.00
41042	10-Ride Ticket Books	\$ 356,270.25
41050	Tokens	-
41060	Gift Certificates Sold	\$ 465.00
41110	Cash over/(short)	\$ 326.80
41111	Credit Card Discounts	\$ (60,168.08)
41115	Pass refunds	\$ (7,274.00)
41118	Gift Certificates Used	\$ (2,261.00)
41119	On Account Clearing	\$ 15,803.35
41120	Consignment Discount	\$ (27,768.15)
41121	Not for Profit Discount	\$ (240,457.50)
41122	Donations/Promo	\$ (6,417.00)
41210	Shipping & Handling Revenue	\$ 5,227.00
41510	Group Pass Earned Income	\$ 2,275,859.44
	General Fund Total	\$6,832,106.37

LTD Revenue Sources Breakdown



Agency Fare Comparison

		LTD	RVTD	TriMet	King County
Single Fares					
Adult/Full		\$ 1.75	\$ 2.00		\$ 2.75
2 & 1/2 Hour Ride				\$ 2.50	\$ 1.50
Youth Single Ride		\$ 0.85	\$ 1.00		\$ 1.00
Senior/Disabled/Half Fare Single			\$ 1.00		\$ 1.00
Senior/Disabled/Half Fare Single Ride for 2 & 1/2 hours				\$ 1.25	
Honored Riders (65 years plus)		free			
Children (5 & under)		free			
Day Pass					
Req. Day Pass		\$ 3.50	\$ 6.00	\$ 5.00	\$8.00
Youth Day Pass		\$ 1.75			\$4.00
S/D/HF Single		\$ 0.85	\$ 1.00	\$ 1.25	\$4.00
S/D/HF Day Pass		\$ 1.75	\$ 6.00	\$ 2.50	\$4.00
S/D/HF Monthly		\$ 25.00	\$ 28.00	\$ 28.00	
Ticket Books					
10 Ticket Book		\$ 16.00			
20 Ride Pass			\$ 32.00		
Passes					
1-Month		\$ 50.00	\$ 28.00		
3-Month		\$ 135.00			
Honored Citizen Monthly Pass & Youth (Honored Riders (65+) & Youth 7 - 17 years of age)		free		\$ 28.00	
		free			
Special Services					
RideSource/OrcaLift/Paratransit/Lift Single		\$ 3.50		\$ 2.50	\$1.50
RideSource/OrcaLift/Paratransit/Lift 10 ticket				\$ 25.00	
RideSource/OrcaLift/Paratransit/Lift 20 Trip Punch Card				\$ 48.00	
RideSource/OrcaLift/Paratransit/Lift Monthly Pass				\$ 74.00	\$63.00
RideSource/OrcaLift/Paratransit/Lift Annual Pass				\$ 888.00	
Autzen Express/Husky Express Single		\$ 5.00			\$ 7.00
Autzen Express/Husky Express Season					\$ 30.00
Summer Youth Pass		\$ 50.00	\$ 44.00		

Income Based Fare Program Survey

220 Respondents

How many buses do you ride in a typical day? (count each time you board a bus as 1 bus)

0 times	27
1 time	13
2 times	58
3 times	12
4 times	50
5 times	09
6 times	16
7 times	03
8 times	01

Survey open 1/31/18 – 2/28/18

How many days per week do you and members of your household typically ride the bus?

0 times	37
1 time	16
2 times	17
3 times	14
4 times	22
5 times	49
6 times	28
7 times	28
8 times	28

Income Based Fare Program Survey

Do you live in a household that makes more than \$25,000 per year?

Yes	30%
No	70%

Could you afford to ride the bus if the cost was \$2.50 per day or \$40 per month?

Yes	27.73%
No	32.73%
Possibly	39.55%

Could you afford to ride if the cost was \$3.50 per day or \$50 month?

Yes	13.64%
No	67.27%
Possibly	19.09%

Is the cost of a bus pass a barrier to you doing the things you need/want to do in your community?

Significantly	40.91%
Sometimes	36.82%
Never	22.27%

Income Based Fare Program Survey

If you are a bus rider, how do you buy your bus pass?

Daily	25.45%
Monthly	23.64%
10-Ride Ticket Book	13.18%
*Other (please specify)	37.73%

*Most answers to this "option are either "I don't ride the bus" or they get their pass from an agency.

Are you:

Male	30.45%
Female	63.64%
Prefer not to answer	5.91%

Age Bracket:

5 - 18	2.28%
19 - 34	32.88%
35 - 49	29.68%
50 - 64	28.77%
65+	6.39%



**LANE TRANSIT DISTRICT
AD HOC FARE POLICY MEETING**

**Monday, August 27, 2018
5:30 p.m.**

LTD BOARD ROOM

3500 E. 17th Avenue, Eugene (in Glenwood)

- | | | |
|-----------|------|---|
| Time | | |
| 5:30 p.m. | I. | WELCOME AND INTRODUCTIONS |
| 5:40 p.m. | II. | PURPOSE |
| | | <i>Staff will provide a description of the purpose of this meeting and the committee that is to be formed.</i> |
| | | <ul style="list-style-type: none">• DICUSSED THE BOARD'S REQUEST TO LOOK AT LTD'S PAST, CURRENT AND POTENTIAL FUTURE FARE STRUCTURE• PROVIDED A BRIEF HISTORY OF THE SUBSIDIEZED YOUTH PASS PROGRAM• INFORMED ATTENDEES THAT THEY HAVE BEEN SELECGTED TO JOIN THE FARE ADHOC COMMITTEE, A PUBLIC MEETING THAT WOULD PROVIDE ADVISE TO THE BOARD, A PUBLIC GOVERNING BODY.• PUBLIC MEETINGS ARE SUBJECT TO OREGON MTG LAWS INLCUDING TAKING OF MINUTES, RECORDINGS SUBJECT TO PUBLIC REQUEST REQUIREMENTS AND ATTENANDANCE BY MEMBERS OF THE PUBLIC.• BOARD MEMBER YEH |
| 5:50 p.m. | III. | REVIEW OF LTD'S CURRENT FARE POLICY |
| | | <i>Lane transit district's current fare policy will be provided for review and discussion.</i> |
| 6:10 p.m. | IV. | PROCESS FOR DEVELOPING A RECOMMENDATION |
| | | <i>Discussion will be held to determine the process of evaluating LTD's fare policy and the most effective process to develop a policy recommendation.</i> |
| | | <ul style="list-style-type: none">• LANE ESD, MITCHELL MARTIN• SCHOOL DISTRICTS• CARMEL SNYDER, AARP |

6:30 p.m. V. TIMELINE AND FUTURE MEETINGS' SCHEDULE
Discussion will be held regarding the timeline, number, and structure of future meetings.

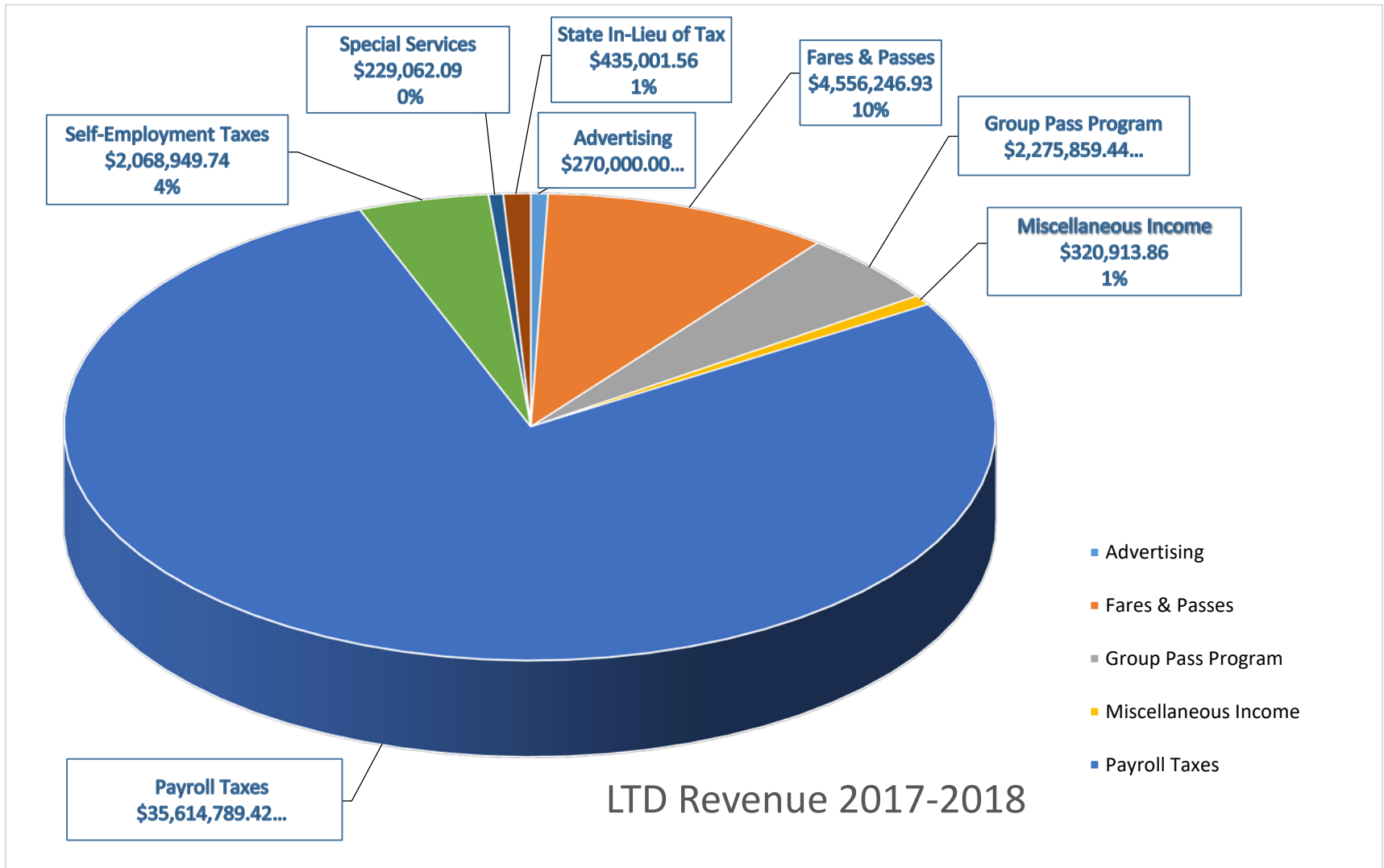
6:45 p.m. VI. ADJOURNMENT

NOTES

LTD Fare Revenue Breakdown

Revenue Status Report		8/15/2018 03:53 PM
07/01/2017 - 06/30/2018		
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Account Number		YTD Revenues
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Senior/Disabled/Half Fare Single			\$ 1.00		\$ 1.00
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Ticket Books					
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20 Ride Pass			\$ 32.00		
Passes					
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3-Month		\$ 135.00			
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	LTD	RVTD
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Senior/Disabled/Half Fare Single		\$ 1.00
Senior/Disabled/Half Fare Single Ride for 2 & 1/2 hours		
Honored Riders (65 years plus)	free	
Children (5 & under)	free	
Day Pass		
Reg. Day Pass	\$ 3.50	\$ 6.00
Youth Day Pass	\$ 1.75	
S/D/HF Single	\$ 0.85	\$ 1.00
S/D/HF Day Pass	\$ 1.75	\$ 6.00
S/D/HF Monthly	\$ 25.00	\$ 28.00
Ticket Books		
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RideSource/OrcaLift/Paratransit/Lift Monthly Pass		
RideSource/OrcaLift/Paratransit/Lift Annual Pass		
Autzen Express/Husky Express Single	\$ 5.00	
Autzen Express/Husky Express Season		\$ -
Summer Youth Pass	\$ 50.00	\$ 44.00
Helping hands pass		

TriMet

King County

\$ 2.50 \$ 2.75
\$ 2.50 \$ 1.50

\$ 1.25

\$ 5.00

\$ 1.25

\$ 2.50

\$ 28.00

\$ 28.00

\$ 2.50

\$ 25.00

\$ 48.00

\$ 74.00

\$ 888.00

\$ 7.00

\$ 30.00

Revenue Status Report

8/15/2018 03:53

07/01/2017 - 06/30/2018

010 General Fund

<u>Account Number</u>	YTD Revenues
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General Fund Total	\$ 6,832,106.37

Revenue Status Report

07/01/2017 - 06/30/2018, Period = 16 - Default Basis

010 General Fund

Account Number

000.00 *** Title Not Found ***

Adj. Estimate

Revenues

YTD Revenues

Balance

% Rcvd

41010 Farebox Cash
41011 Ticket Vending Machine (TVM) Fares
41012 Farebox replacement
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41020 Monthly Passes
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41119 On Account Clearing
41120 Consignment Discount
41121 Not for Profit Discount
41122 Donations/Promo
41210 Shipping & Handling Revenue
41510 Group Pass Earned Income
General Fund Total

2,008,284.00	1,429,639.60	1,429,639.60	578,644.40	71.19
257,500.00	314,860.88	314,860.88	(57,360.88)	122.28
78,000.00	3,149.60	3,149.60	74,850.40	4.04
82,500.00	98,970.71	98,970.71	(16,470.71)	119.96
-	-	-	-	-
2,032,410.00	2,175,773.00	2,175,773.00	(143,363.00)	107.05
-	(1,018.50)	(1,018.50)	1,018.50	-
-	-	-	-	-
-	-	-	-	-
390,000.00	313,290.00	313,290.00	76,710.00	80.33
35,000.00	22,890.00	22,890.00	12,110.00	65.40
-	-	-	-	-
108,000.00	144,736.12	144,736.12	(36,736.12)	134.01
16,500.00	18,997.85	18,997.85	(2,497.85)	115.14
-	1,211.00	1,211.00	(1,211.00)	-
370,800.00	356,270.25	356,270.25	14,529.75	96.08
-	-	-	-	-
-	465.00	465.00	(465.00)	-
-	326.80	326.80	(326.80)	-
(49,000.00)	(60,168.08)	(60,168.08)	11,168.08	122.79
(300.00)	(7,274.00)	(7,274.00)	6,974.00	2424.67
-	(2,261.00)	(2,261.00)	2,261.00	-
-	15,803.35	15,803.35	(15,803.35)	-
(22,700.00)	(27,768.15)	(27,768.15)	5,068.15	122.33
(200,000.00)	(240,457.50)	(240,457.50)	40,457.50	120.23
(5,400.00)	(6,417.00)	(6,417.00)	1,017.00	118.83
3,100.00	5,227.00	5,227.00	(2,127.00)	168.61
2,310,000.00	2,275,859.44	2,275,859.44	34,140.56	98.52
7,414,694.00	6,832,106.37	6,832,106.37	582,587.63	92.14
\$7,414,694.00	\$6,832,106.37	\$6,832,106.37	\$582,587.63	92.14

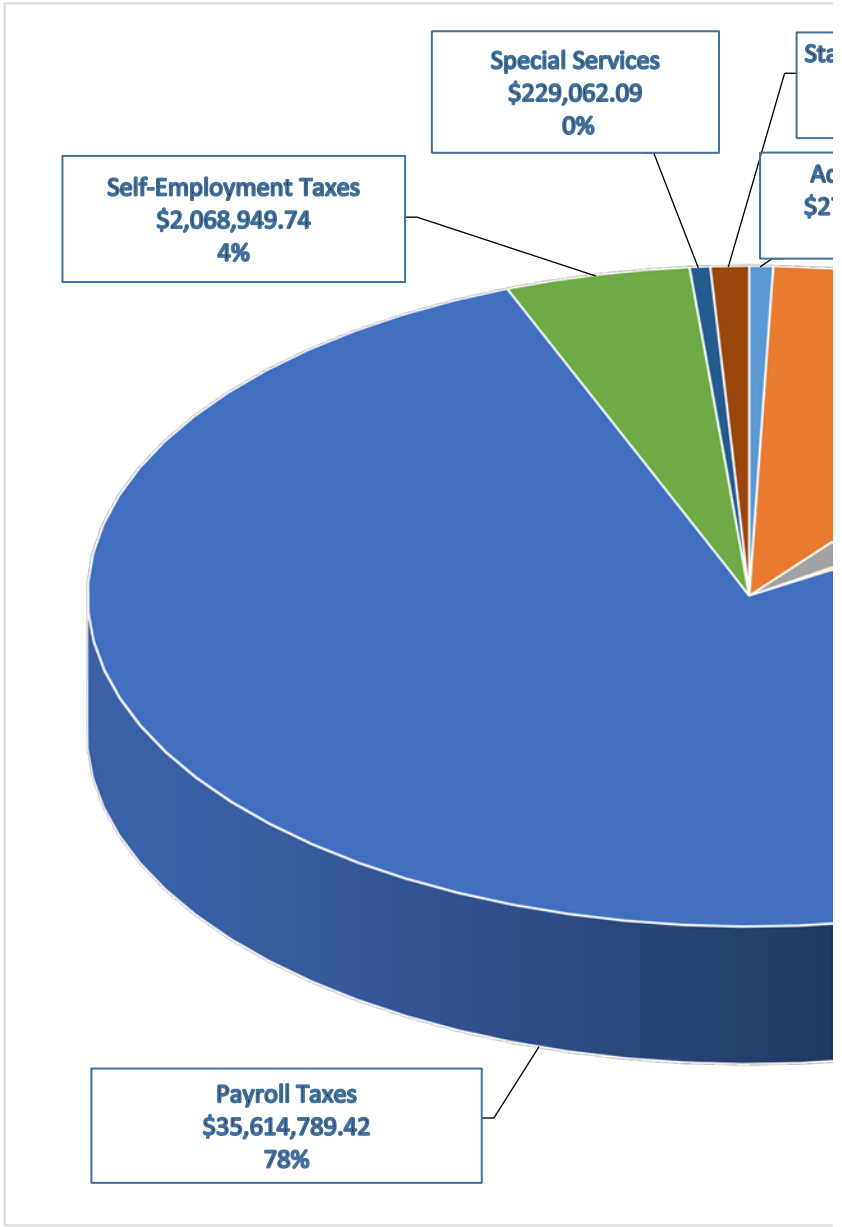


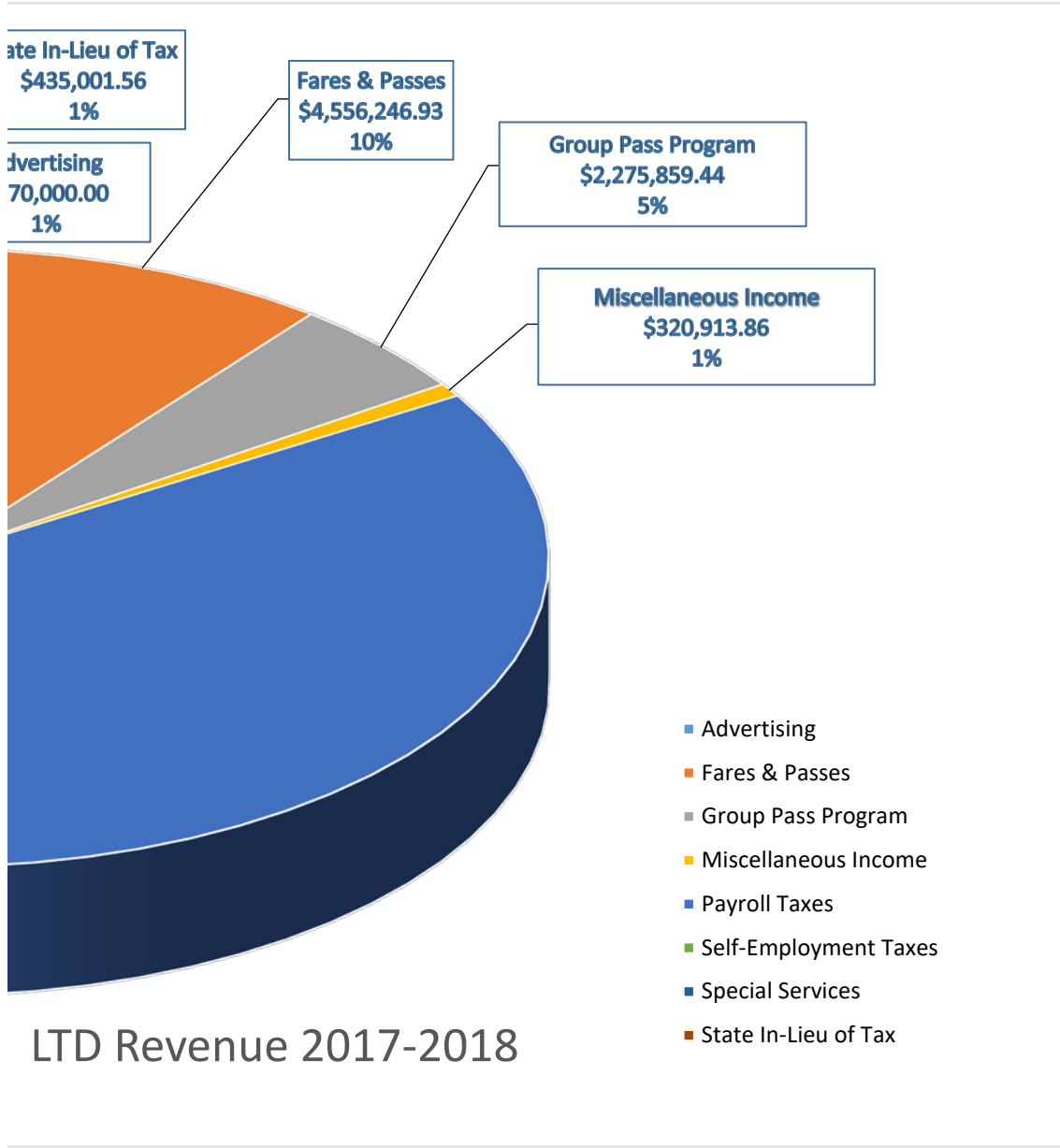
Revenue Status Report
07/01/2017 - 06/30/2018, Period = 16 - Default Basis

8/15/2018 03:53 PM

010 General Fund

<u>Account Number</u>	<u>Adj. Estimate</u>	<u>Revenues</u>	<u>YTD Revenues</u>	<u>Balance</u>	<u>% Rcvd</u>
000.00 *** Title Not Found ***					
41010 Farebox Cash	2,008,284.00	1,429,639.60	1,429,639.60	578,644.40	71.19
41011 Ticket Vending Machine (TVM) Fares	257,500.00	314,860.88	314,860.88	(57,360.88)	122.28
41012 Farebox replacement	78,000.00	3,149.60	3,149.60	74,850.40	4.04
41015 Football fares	82,500.00	98,970.71	98,970.71	(16,470.71)	119.96
41019 GSC NSF payments and fees	-	-	-	-	-
41020 Monthly Passes	2,032,410.00	2,175,773.00	2,175,773.00	(143,363.00)	107.05
41022 Pass replacement	-	(1,018.50)	(1,018.50)	1,018.50	-
41025 LCC Term Pass	-	-	-	-	-
41026 Student Transit Pass	-	-	-	-	-
41034 Contract - 3 month	390,000.00	313,290.00	313,290.00	76,710.00	80.33
41035 Passes-3mo Flash	35,000.00	22,890.00	22,890.00	12,110.00	65.40
41038 Misc. Pass Sales	-	-	-	-	-
41039 Annual passes	108,000.00	144,736.12	144,736.12	(36,736.12)	134.01
41040 Day Passes	16,500.00	18,997.85	18,997.85	(2,497.85)	115.14
41041 Day Pass Ticket Books	-	1,211.00	1,211.00	(1,211.00)	-
41042 10-Ride Ticket Books	370,800.00	356,270.25	356,270.25	14,529.75	96.08
41050 Tokens	-	-	-	-	-
41060 Gift Certificates Sold	-	465.00	465.00	(465.00)	-
41110 Cash over/(short)	-	326.80	326.80	(326.80)	-
41111 Credit Card Discounts	(49,000.00)	(60,168.08)	(60,168.08)	11,168.08	122.79
41115 Pass refunds	(300.00)	(7,274.00)	(7,274.00)	6,974.00	2424.67
41118 Gift Certificates Used	-	(2,261.00)	(2,261.00)	2,261.00	-
41119 On Account Clearing	-	15,803.35	15,803.35	(15,803.35)	-
41120 Consignment Discount	(22,700.00)	(27,768.15)	(27,768.15)	5,068.15	122.33
41121 Not for Profit Discount	(200,000.00)	(240,457.50)	(240,457.50)	40,457.50	120.23
41122 Donations/Promo	(5,400.00)	(6,417.00)	(6,417.00)	1,017.00	118.83
41210 Shipping & Handling Revenue	3,100.00	5,227.00	5,227.00	(2,127.00)	168.61
41510 Group Pass Earned Income	2,310,000.00	2,275,859.44	2,275,859.44	34,140.56	98.52
General Fund Total	<u>7,414,694.00</u>	<u>6,832,106.37</u>	<u>6,832,106.37</u>	<u>582,587.63</u>	<u>92.14</u>
	<u>\$7,414,694.00</u>	<u>\$6,832,106.37</u>	<u>\$6,832,106.37</u>	<u>\$582,587.63</u>	<u>92.14</u>





A. Copy of LTD Fare Policy

To be combined on spread sheet with E - Julie

B. ~~Breakdown of LTD Fare Revenue Sources (mostly Liz)~~

- o Total fare revenue
 - Day pass
 - Monthly pass
 - Group pass
 - 10-ride ticket book
 - Half-fare
 - Youth pass
 - 1pass
 - Any other fare medium

C. Breakdown of LTD revenue sources (pie chart from legislature)

D. Ridership demographics from Origin and Destination Study
(planning – Brett or Ashley)

- a. Fare media usage (what types of fares are used and how often?)
- b. Profile of ridership (age, race, commute type, income level)
- c. How many buses/transfers do people make?
- d. Trip purpose (school, work, etc...)

E. Other agency fare policies

- a. TriMet
- b. King County Metro (Seattle)
- c. Rogue Valley Transportation District

F. Survey results

- a. Make graphs of the data
- b. Low income
- c. Half fare
- d. Youth pass
- e. ? What is the income level?

- f. ? How does cost affect ridership?
- g. ? Frequency of use of services?
- h. What could people afford?
- i. Could probably combine the CSC and the low income (renee) survey

G. Ridership data

- a. Ridership near schools
- b. Ridership near low-income housing
- c. Ridership in downtown cores



2015 *Passenger Survey*



Methodology

Primary Survey Methodology

- Self-Administered Survey
- Distributed/Collected by Trained Surveyors
- Bi-lingual [Questionnaire](#)
- Modified Random Sample of Runs
 - Including Weekday, Sat and Sun
- 8-day survey period
 - 535 hours of surveying









LTD CUSTOMER SURVEY- OCTOBER 2015

If you have completed this survey in the past two weeks, check this box and complete only questions 1-17.

Please tell us about the one-way trip that you are currently taking. An example of a one-way trip is going from home to work, even if you use more than one bus. Going from work back home would be a different one-way trip.

<p>1. Where did you START this one-way trip? (Mark the one best answer)</p>	<p> 3. How did you get to the first bus stop?</p>	<p> 4. Where did you get on the first bus?</p>	<p> 7. Where will you get off the final bus?</p>	<p> 8. How will you get to your destination when you get off the last bus?</p>	<p>9. Where will you END this one-way trip? (Mark the one best answer)</p>
<p>1 <input type="checkbox"/> Home 2 <input type="checkbox"/> Work/Work-related 3 <input type="checkbox"/> College 4 <input type="checkbox"/> Middle/High School 5 <input type="checkbox"/> Store or Restaurant 6 <input type="checkbox"/> Medical/Dental Office 7 <input type="checkbox"/> Social Service Appointment 8 <input type="checkbox"/> Visiting Others 9 <input type="checkbox"/> Entertainment/Recreation 10 <input type="checkbox"/> Other: _____</p> <p>2. My Starting Point was located at:</p> <p>Address: (such as 123 W. 1st Ave) _____ _____ _____ Or Cross streets: (such as E. 18th Ave & Pearl) _____ _____ City: <input type="checkbox"/> Eugene <input type="checkbox"/> Springfield <input type="checkbox"/> Other: _____</p>	<p>1 <input type="checkbox"/> Walked 2 <input type="checkbox"/> Drive alone 3 <input type="checkbox"/> Drove with another rider and parked 4 <input type="checkbox"/> Dropped off by someone 5 <input type="checkbox"/> Dropped off by a taxi or paid rideshare 6 <input type="checkbox"/> Wheelchair/Scooter 7 <input type="checkbox"/> Biked and put bike on bus/EMX 8 <input type="checkbox"/> Biked and left bike at/near bus stop/station 9 <input type="checkbox"/> Other: _____</p>	<p>Station Name: _____ OR _____ Stop location: _____ Street Name _____ Nearest cross street _____</p> <p>City: <input type="checkbox"/> Eugene <input type="checkbox"/> Springfield <input type="checkbox"/> Other: _____</p> <p>5. My first bus was on Route Number: _____</p> <p>6. Will you use more than one bus to complete this one-way trip?</p> <p><input type="checkbox"/> No – this is my only and final bus</p> <p>I will use a 2nd bus route: # _____</p> <p>I will use a 3rd bus route: # _____</p>	<p>Station Name: _____ OR _____ Stop location: _____ Street Name _____ Nearest cross street _____</p> <p>City: <input type="checkbox"/> Eugene <input type="checkbox"/> Springfield <input type="checkbox"/> Other: _____</p>	<p>1 <input type="checkbox"/> Walk 2 <input type="checkbox"/> Drive alone 3 <input type="checkbox"/> Drive with another rider 4 <input type="checkbox"/> Picked up by someone 5 <input type="checkbox"/> Take a taxi or paid rideshare 6 <input type="checkbox"/> Wheelchair/Scooter 7 <input type="checkbox"/> Bike using my bike that I brought with me on bus/EMX 8 <input type="checkbox"/> Bike using a bike that I did NOT take on the bus 9 <input type="checkbox"/> Other: _____</p>	<p>1 <input type="checkbox"/> Home 2 <input type="checkbox"/> Work/Work-related 3 <input type="checkbox"/> College 4 <input type="checkbox"/> Middle/High School 5 <input type="checkbox"/> Store or Restaurant 6 <input type="checkbox"/> Medical/Dental Office 7 <input type="checkbox"/> Social Service Appointment 8 <input type="checkbox"/> Visiting Others 9 <input type="checkbox"/> Entertainment/Recreation 10 <input type="checkbox"/> Other: _____</p> <p>10. My Ending Point is located at:</p> <p>Address: (such as 123 W. 1st Ave) _____ _____ Or Cross streets: (such as E. 18th Ave & Pearl) _____ _____ City: <input type="checkbox"/> Eugene <input type="checkbox"/> Springfield <input type="checkbox"/> Other: _____</p>

Please turn the survey over and complete the questions on the back 



LTD CUSTOMER SURVEY - OCTOBER 2015

11. What was your fare payment for this one-way trip?

(Make ONE selection)

- 1 Cash
- 2 Day Pass
- 3 Ticket from 10-Ride Book
- 4 Ticket from fare machine
- 5 Monthly/3-Month Pass
- 6 Employer/School Group Pass
- 7 Other (specify): _____

12. How many separate one-way LTD trips will you make today?

(Circle a number)

- 1 2 3 4 5 6 or more

13. Including today, how many days have you ridden LTD in the past week? (Circle a number)

- 1 2 3 4 5 6 7

14. Do you have a valid driver's license? 1 Yes 2 No

15. How many others in the household have valid licenses?

- 0 – None 1 2 3 4 or more

16. How many working vehicles are owned or leased by your household?

- 0 – None 1 2 3 4 or more

17. Please mark **all** of the following that apply to you. Are you:

- 1 Employed for pay outside your home
- 2 Employed for pay in your home
- 3 UO Student
- 4 LCC Student
- 5 Middle/High School Student
- 6 Other Student
- 7 Homemaker
- 8 Retired
- 9 Unemployed
- 10 Disabled

18. What is your age? _____

If you have completed this survey during the past two weeks, please stop here and return the questionnaire to the surveyor. Thank you!

19. What type of assistance, if any, did you need to use the bus today? (All that apply)

- 1 No assistance
- 2 Lift/Ramp
- 3 Stop announcements
- 4 Driver assistance
- 5 Travel training
- 6 Personal assistant
- 7 Service animal
- 8 Other: _____

20. How do you get route and schedule information for LTD?

(Check all that apply)

- 1 Riders Digest
- 2 Telephone
- 3 LTD Website
- 4 Mobile website
- 5 Google Maps
- 6 Bus Operators
- 7 Customer Service staff at station
- 8 E-mail Alerts
- 9 Info posted at stops/stations
- 10 Other: _____

21. Do you carry a mobile phone?

- 1 Conventional cell phone
- 2 No mobile phone
- 3 Smartphone with internet access

22. What is your total annual household income?

- 1 Less than \$10,000
- 2 \$10,000 to \$14,999
- 3 \$15,000 to \$24,999
- 4 \$25,000 to \$34,999
- 5 \$35,000 to \$44,999
- 6 \$45,000 to \$54,999
- 7 \$55,000 to \$74,999
- 8 \$75,000 to \$99,999
- 9 \$100,000 or more

23. How many people live in your household?

- 1 2 3 4 5 6 7 8 or more

24. Are you of Hispanic or Latino descent? 1 Yes 2 No

25. Which do you consider yourself? (Please mark all that describe you)

- 1 African-American/Black
- 2 Asian
- 3 Caucasian/White
- 4 Native American Indian
- 5 Alaska Native
- 6 Other: _____

26. How well do you speak English?

- 1 Very well 2 Well 3 Not well 4 Not at all

27. What language do you most often speak at home?

- 1 English 2 Spanish 3 Other: _____

28. Do you identify as...

- 1 Male 2 Female 3 Trans gender

In the past 30 days, how well has LTD met your transportation needs in each of these areas?

	Very well					Poorly
29. How often your bus runs	7	6	5	4	3	2 1
30. How often your bus is on schedule	7	6	5	4	3	2 1
31. Comfort while waiting for the bus	7	6	5	4	3	2 1
32. Comfort while riding the bus	7	6	5	4	3	2 1
33. Sense of safety riding with other passengers	7	6	5	4	3	2 1
34. Helpfulness of LTD drivers	7	6	5	4	3	2 1
35. Schedule information at bus stops or stations	7	6	5	4	3	2 1
36. Helpfulness of customer service employees	7	6	5	4	3	2 1
<input type="checkbox"/> Have not talked with them						
37. Information obtained from LTD web site	7	6	5	4	3	2 1
<input type="checkbox"/> Have not used the website						
38. OVERALL, how do you rate LTD services?	7	6	5	4	3	2 1
39. In what year did you begin using LTD buses?						
2008 or before	2009	2010	2011			
2012	2013	2014	2015			
<input type="checkbox"/> This is my first time riding LTD						

Comments:

Thank you! Please return this form to the Surveyor.

Primary Survey

Sample Characteristics

- **Sample Size**
 - 6,722 completed questionnaires
 - 6,457 unduplicated responses
- 84% return rate
- 1.2% completed in Spanish
- 95% confidence, +/- 1% (maximum)
- **Analysis**
 - Summary Analysis of unduplicated responses
 - Data for Geo-coding provided to LTD and LCOG
 - Route by Route Data Utilization

Pilot Tablet Survey

- Abbreviated survey conducted using tablet computers
- Customized program to capture more accurate O/D data
- 266 interviews conducted
- 77 hours of on-bus surveying



Primary Survey

Frequency Segments

Rider Profile

Travel Profile

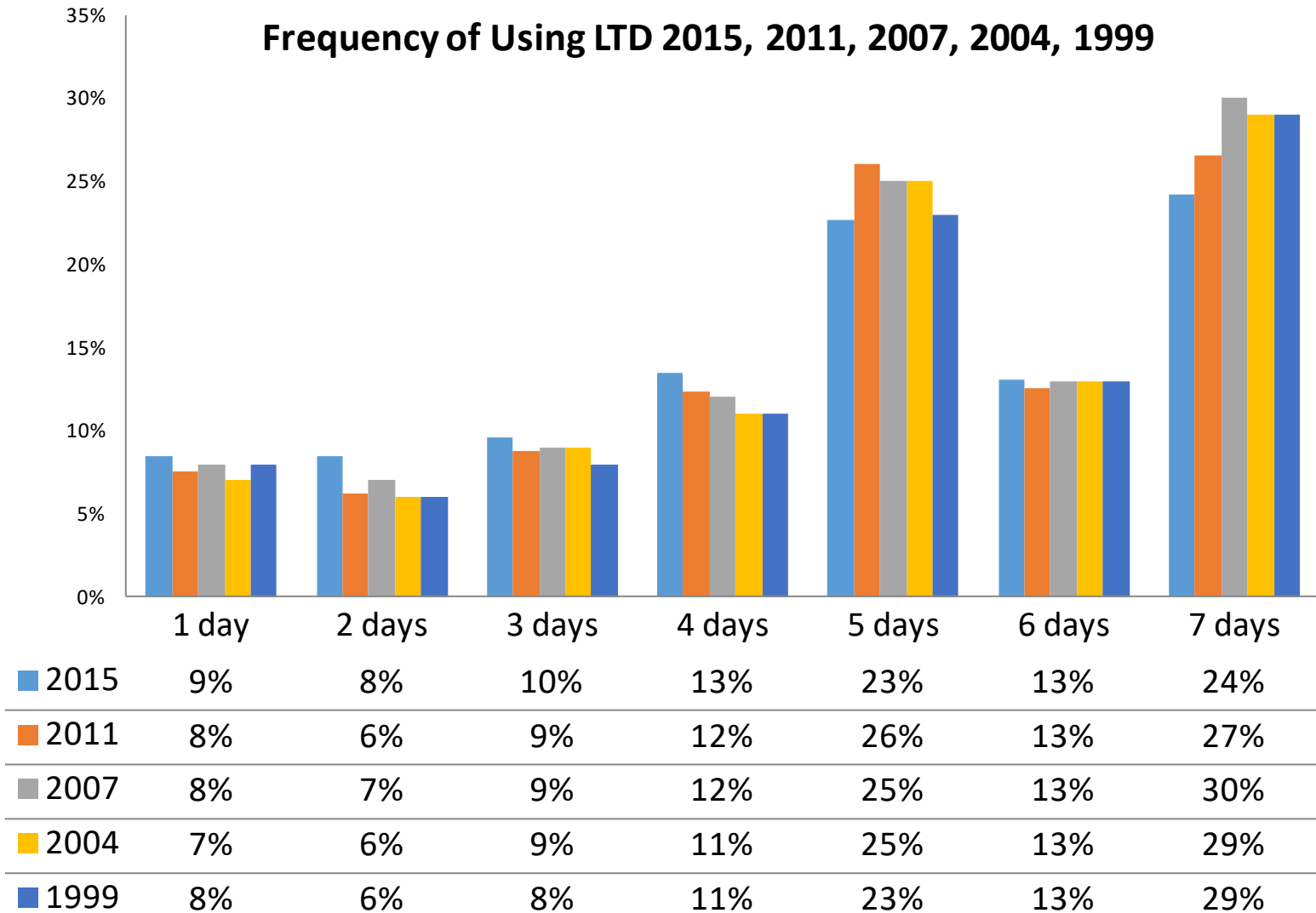
Communications

Service Ratings

Frequency Segments

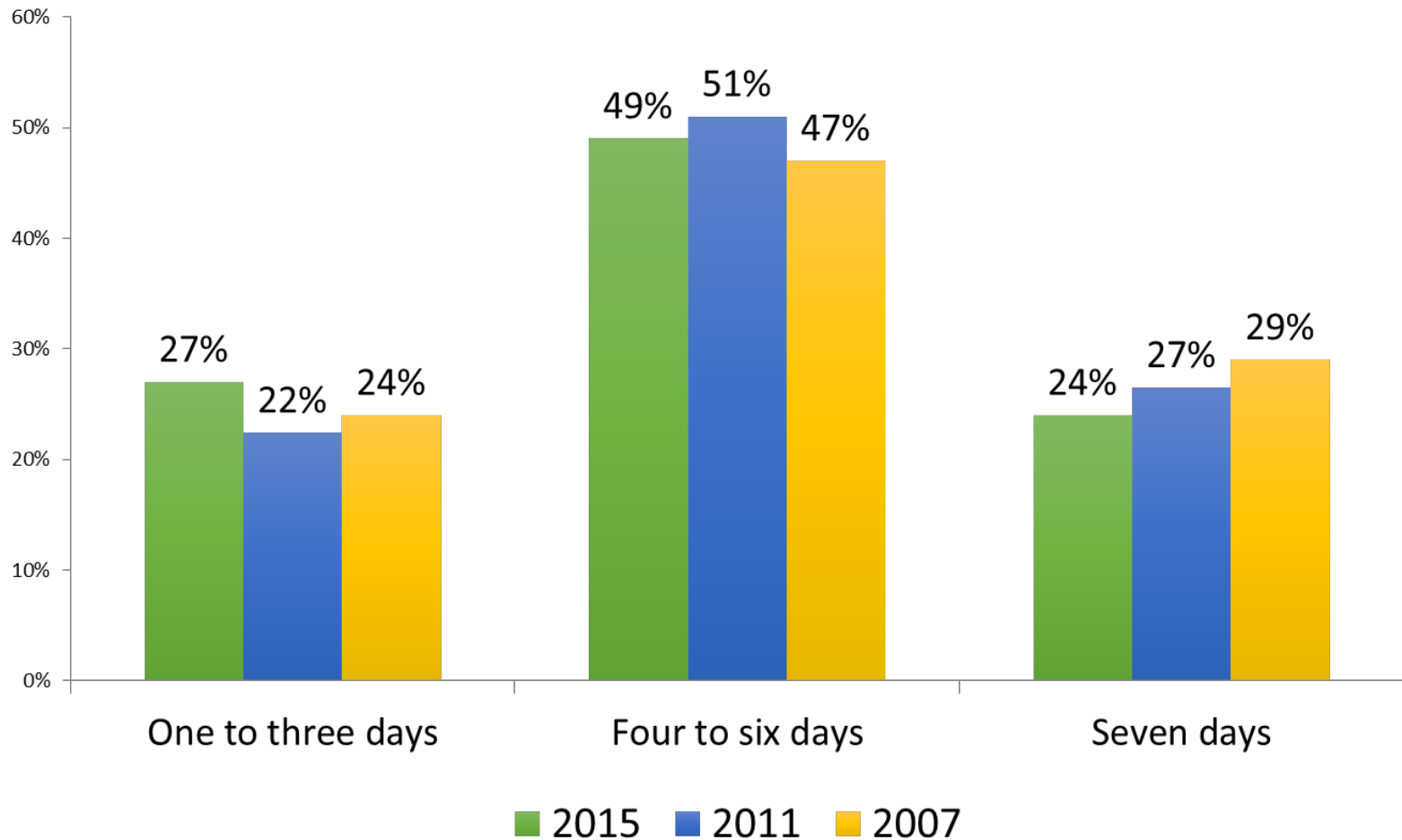
Frequency Over Time

Frequency of Using LTD 2015, 2011, 2007, 2004, 1999



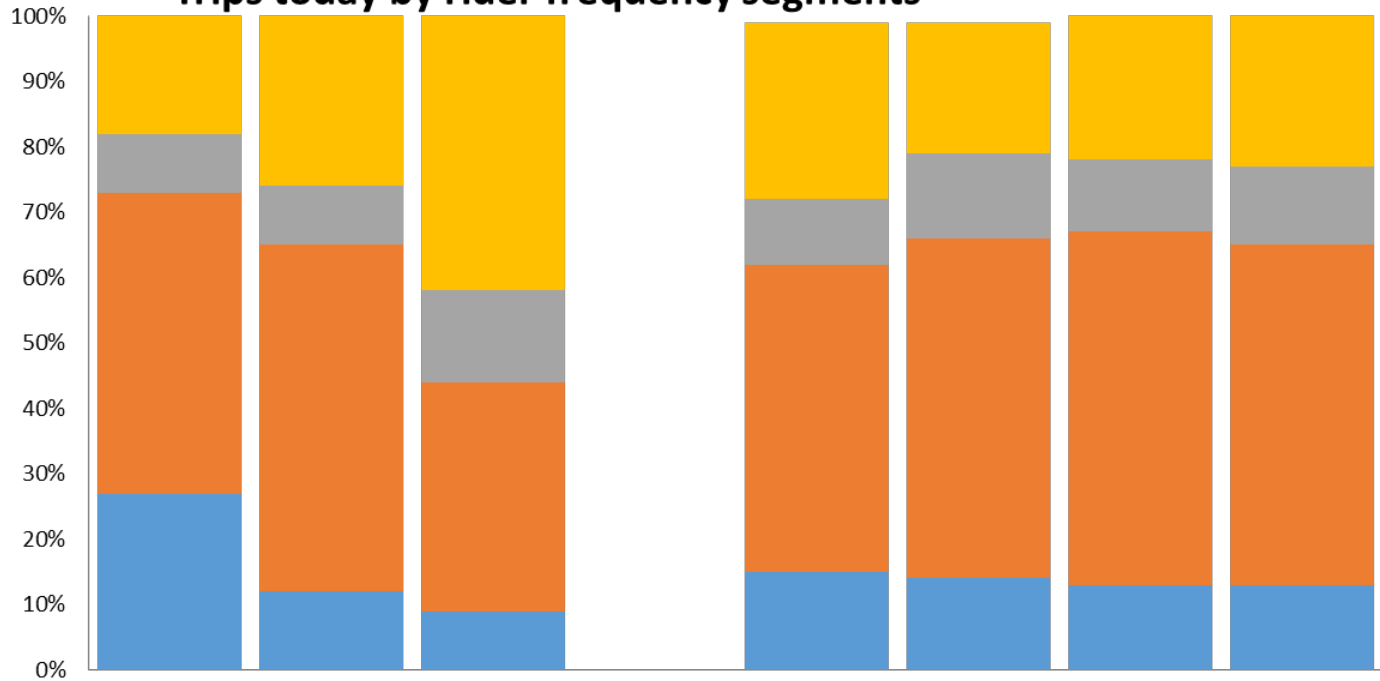
Frequency Segments

Frequency of riding LTD, 2007, 2011, 2015



One-Way Trips Today

Trips today by rider frequency segments

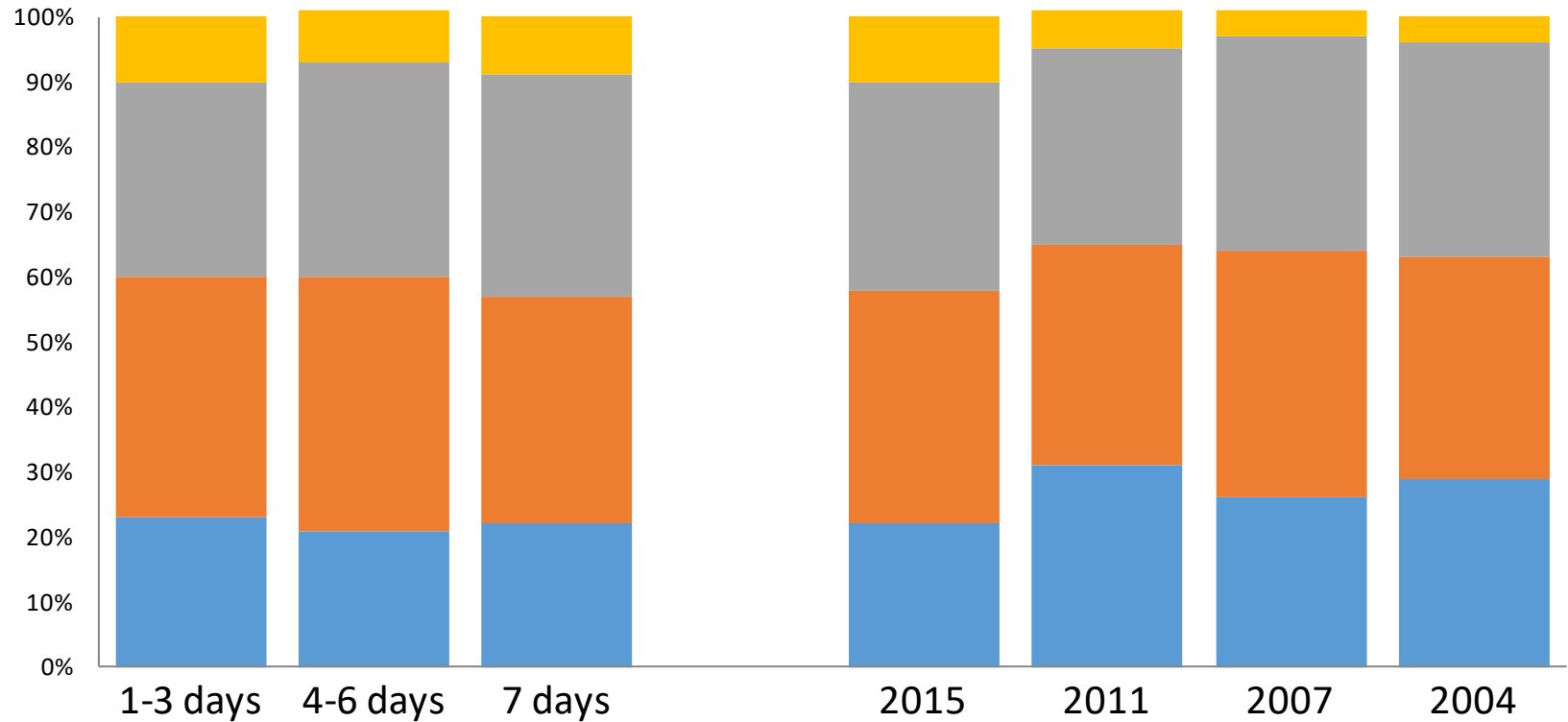


	1-3 days	4-6 days	7 days	2015	2011	2007	2004
4 or more trips	18%	26%	42%	27%	20%	23%	24%
3 trips	9%	9%	14%	10%	13%	11%	12%
2 trips	46%	53%	35%	47%	52%	54%	52%
1 trip	27%	12%	9%	15%	14%	13%	13%

Rider Profile

Age

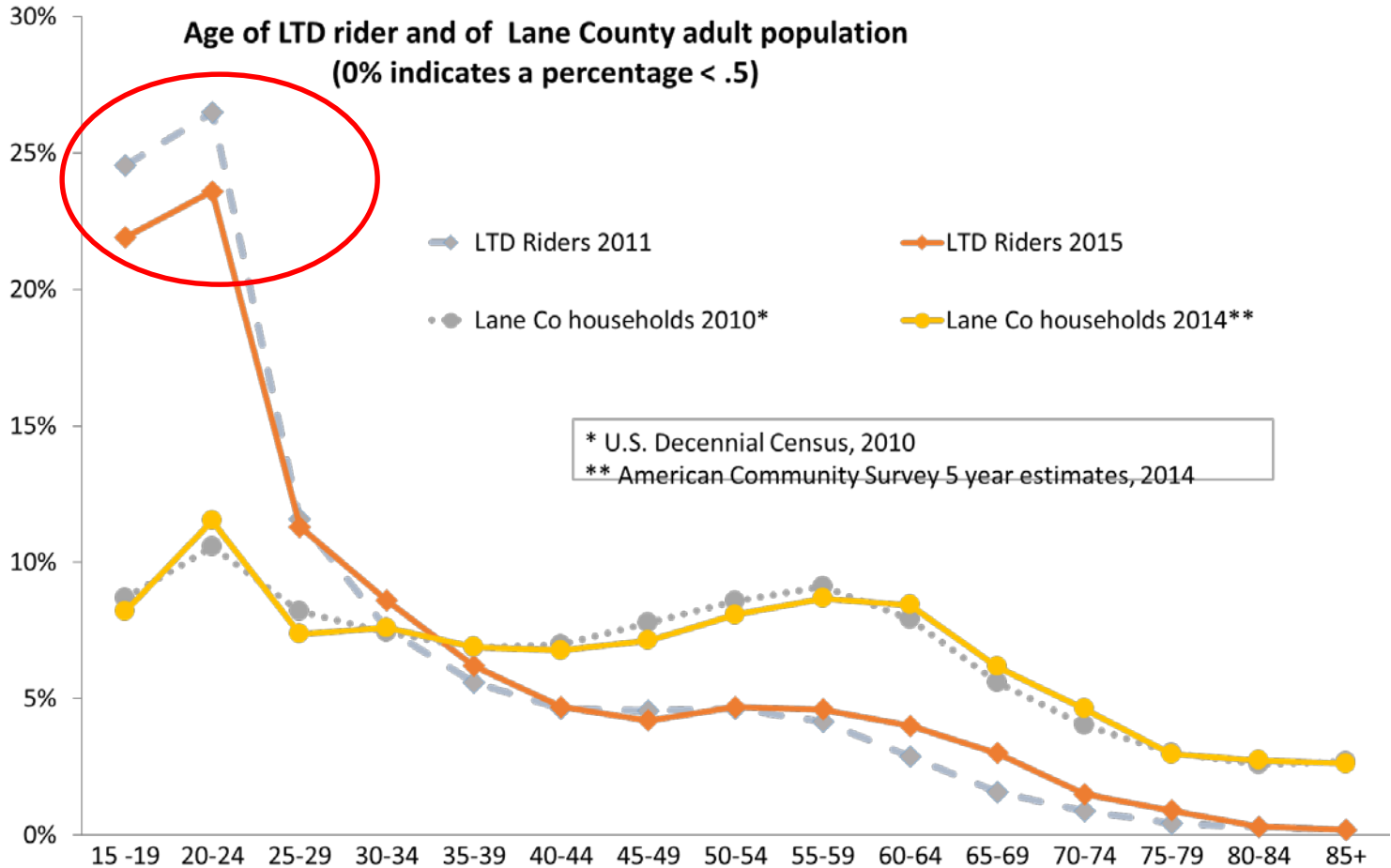
Rider frequency segments - Age



	1-3 days	4-6 days	7 days	2015	2011	2007	2004
Over 60	10%	8%	9%	10%	6%	4%	4%
31 to 60	30%	33%	34%	32%	30%	33%	33%
20 to 30	37%	39%	35%	36%	34%	38%	34%
Under 20	23%	21%	22%	22%	31%	26%	29%

Age

Compared to Lane County Population

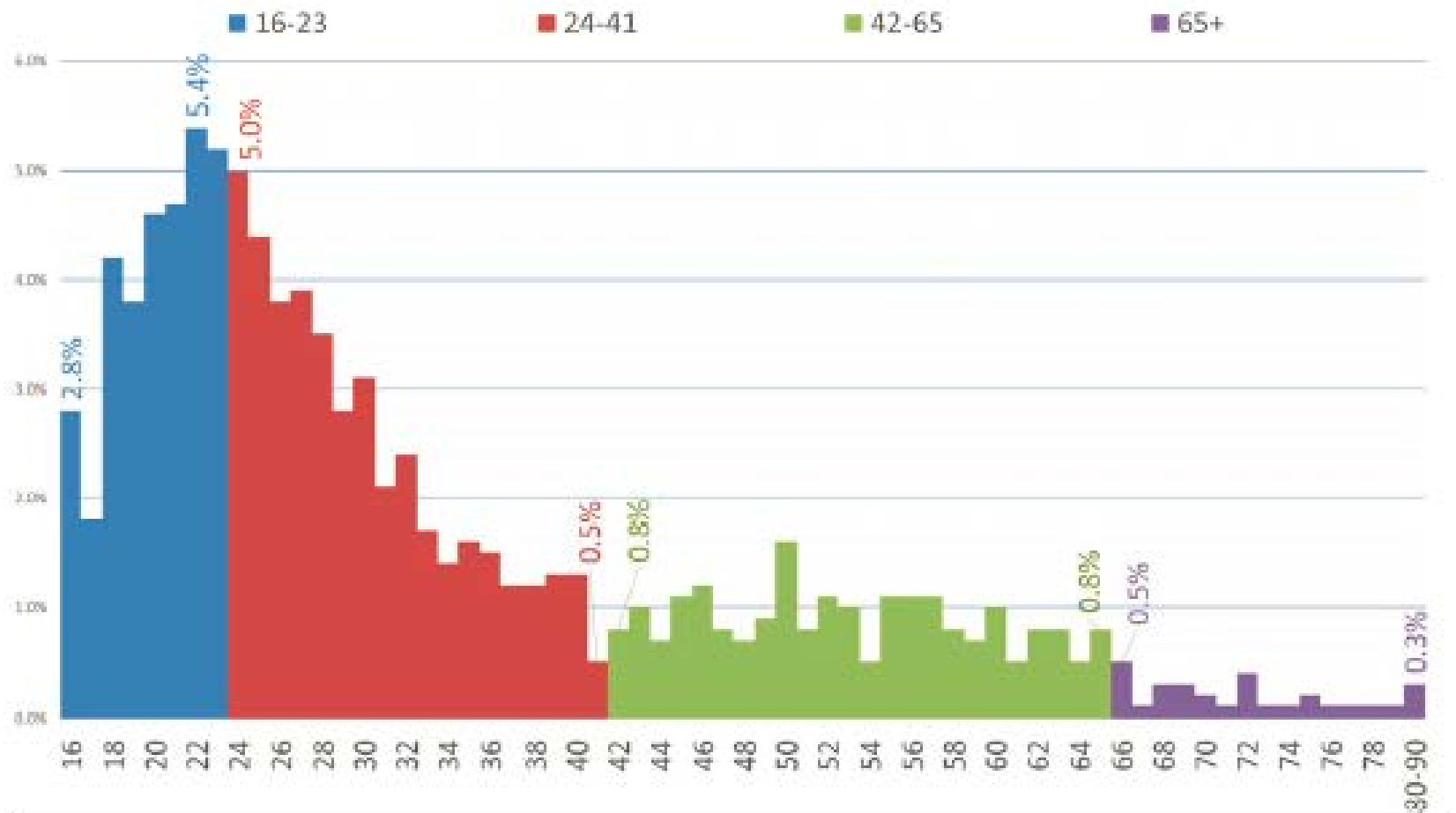


	15 -19	20-24	25-29	30-34	35-39	40-44	45-49	50-54	55-59	60-64	65-69	70-74	75-79	80-84	85+
LTD Riders 2011	25%	26%	12%	8%	6%	5%	5%	5%	4%	3%	2%	1%	0%	0%	0%
LTD Riders 2015	22%	24%	11%	9%	6%	5%	4%	5%	5%	4%	3%	2%	1%	0%	0%
Lane Co households 2010*	9%	11%	8%	7%	7%	7%	8%	9%	9%	8%	6%	4%	3%	3%	3%
Lane Co households 2014**	8%	12%	7%	8%	7%	7%	7%	8%	9%	8%	6%	5%	3%	3%	3%

Ann Arbor, Michigan

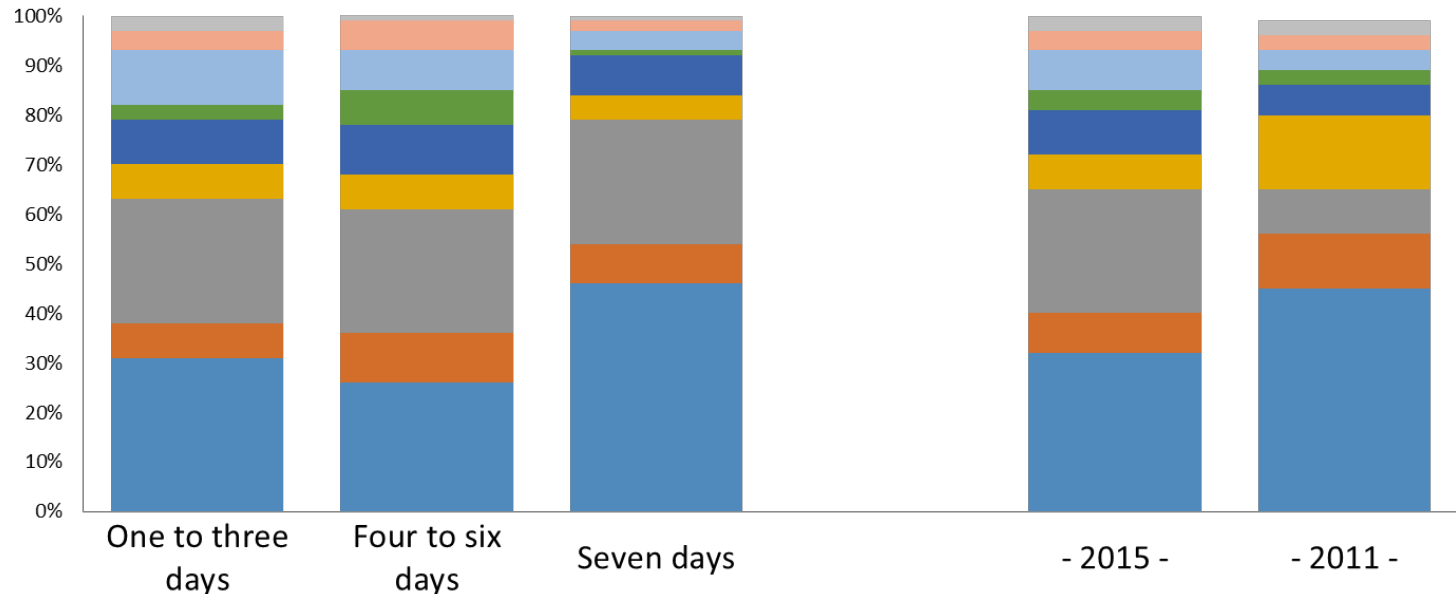
Figure 31 Four life stages of transit ridership

Four Distinct Age Stages of Ridership



Income

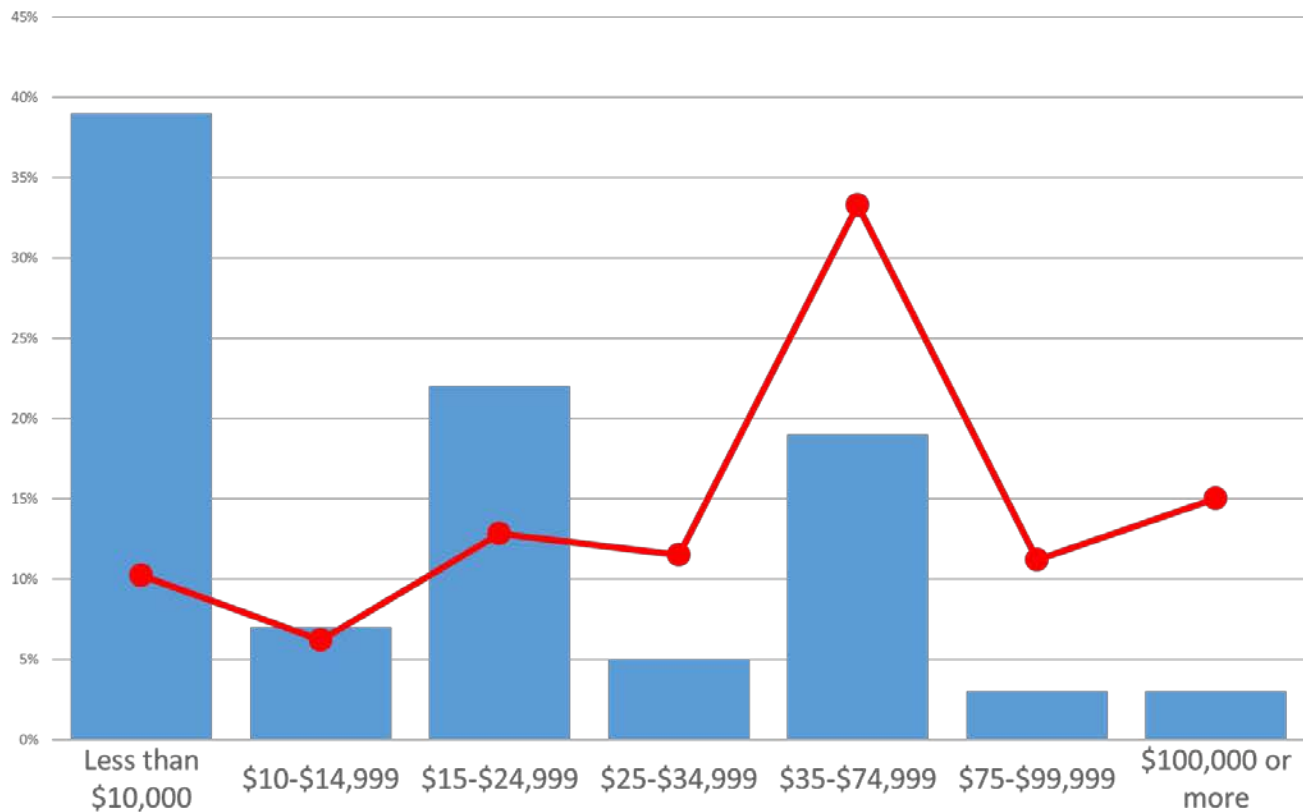
Income and frequency of using LTD



	One to three days	Four to six days	Seven days	- 2015 -	- 2011 -
■ \$100,000 or more	3%	3%	1%	3%	3%
■ \$75,000 to \$99,999	4%	6%	2%	4%	3%
■ \$55,000 to \$74,999	11%	8%	4%	8%	4%
■ \$45,000 to \$54,000	3%	7%	1%	4%	3%
■ \$35,000 to \$44,999	9%	10%	8%	9%	6%
■ \$25,000 to \$34,000	7%	7%	5%	7%	15%
■ \$15,000 to \$24,999	25%	25%	25%	25%	9%
■ \$10,000 to \$14,999	7%	10%	8%	8%	11%
■ Less than \$10,000	31%	26%	46%	32%	45%

Income Compared to Lane County Population

Current household incomes of all LTD riders, compared to ACS estimate of household income distribution for Lane County, based on ACS combined data, 2009-2014. Read percentages left to right.



■ All LTD Riders

● Lane County households (ACS, 5 Year estimate, 2014*)

Income

Students, Non-Students & Lane County

Income of LTD student and non-student riders and of Lane County households



■ Student riders 20 and older

■ Non-student riders, 20 or older

● Lane County households (ACS 2014 5 Year est*)

46%

6%

19%

5%

12%

4%

7%

37%

9%

24%

6%

13%

6%

6%

10%

6%

13%

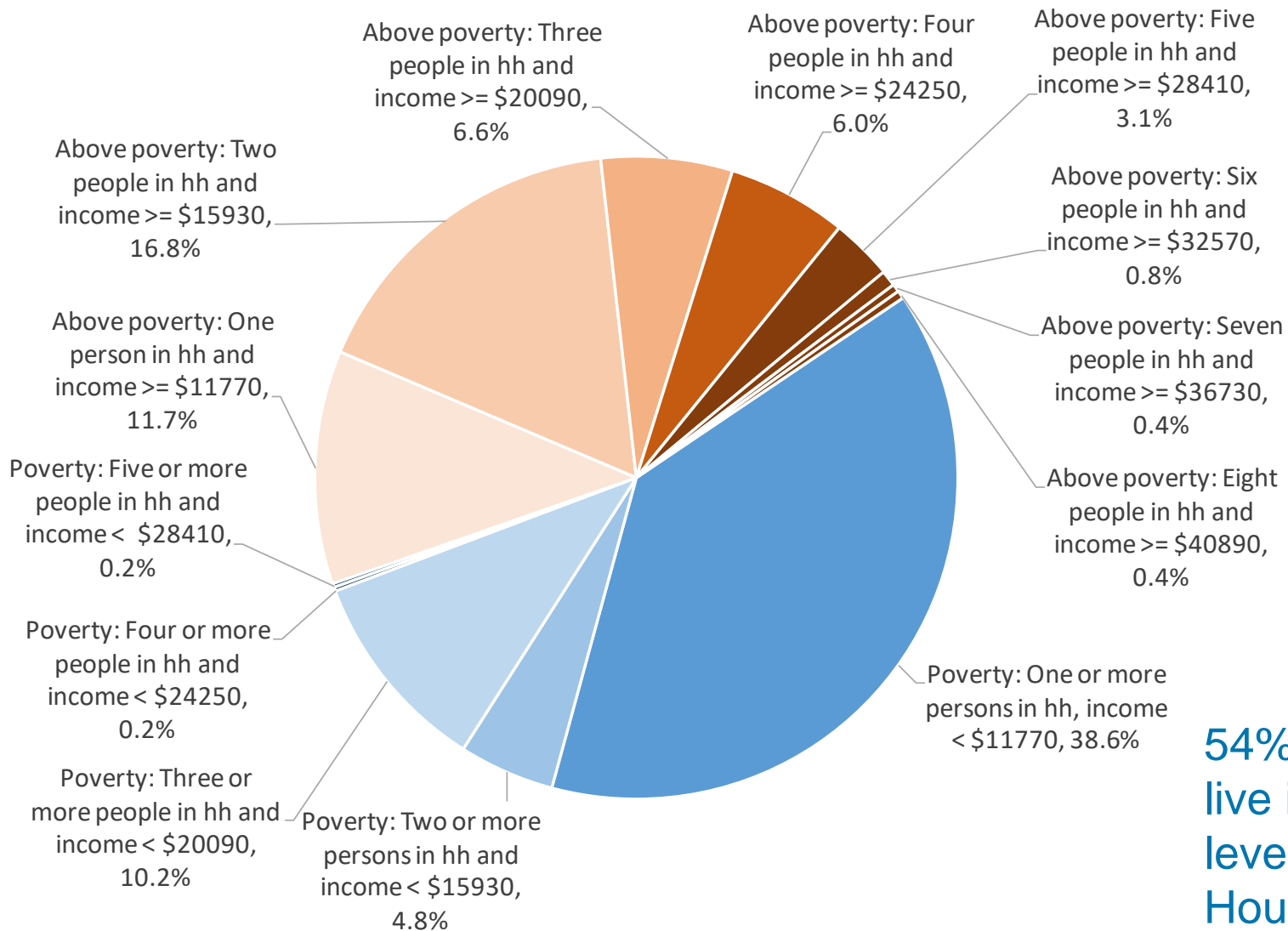
12%

33%

11%

15%

Poverty Level Based on HH Income & Size

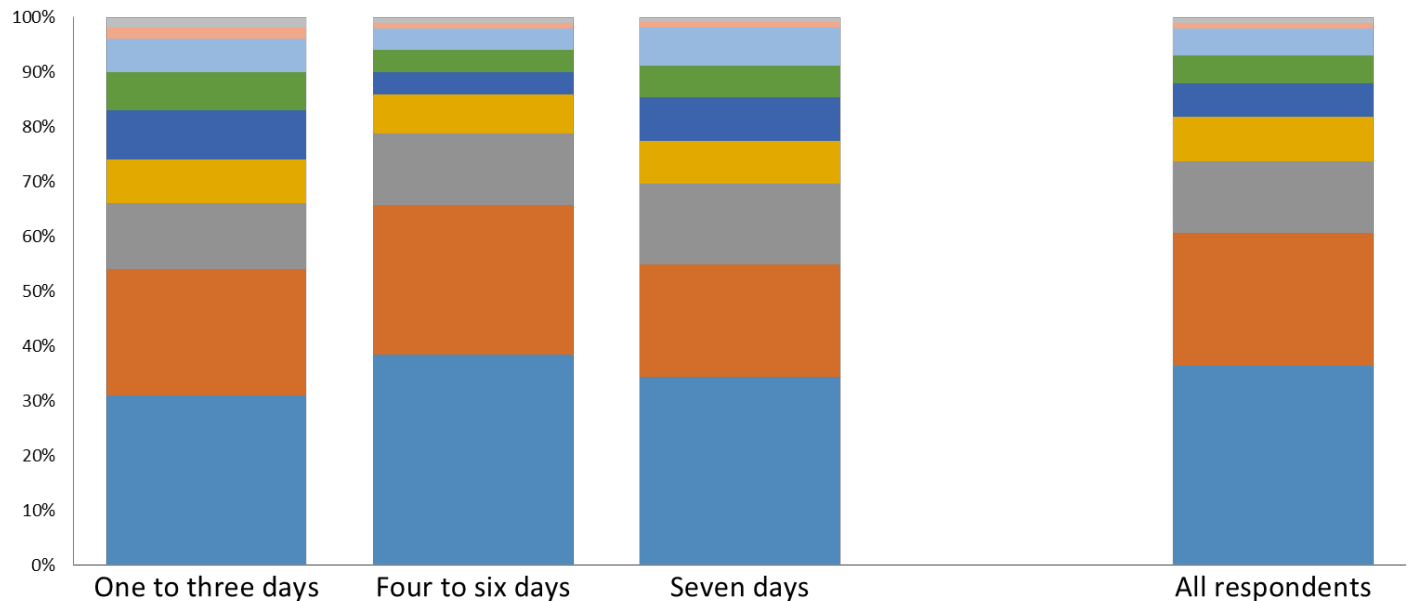


**54% of riders
live in poverty
level
Households**

Employment Status

Employment status and frequency of using LTD

81% of riders are employed, students or both



Employed at home	2%	1%	1%	1%
Homemaker	2%	1%	1%	1%
Disabled	6%	4%	7%	5%
Retired	7%	4%	6%	5%
Unemployed	9%	4%	8%	6%
Middle or HS or Other student	8%	7%	8%	8%
Student and employed	12%	13%	15%	13%
College student	23%	27%	21%	24%
Work outside home	31%	38%	35%	36%

Student Status

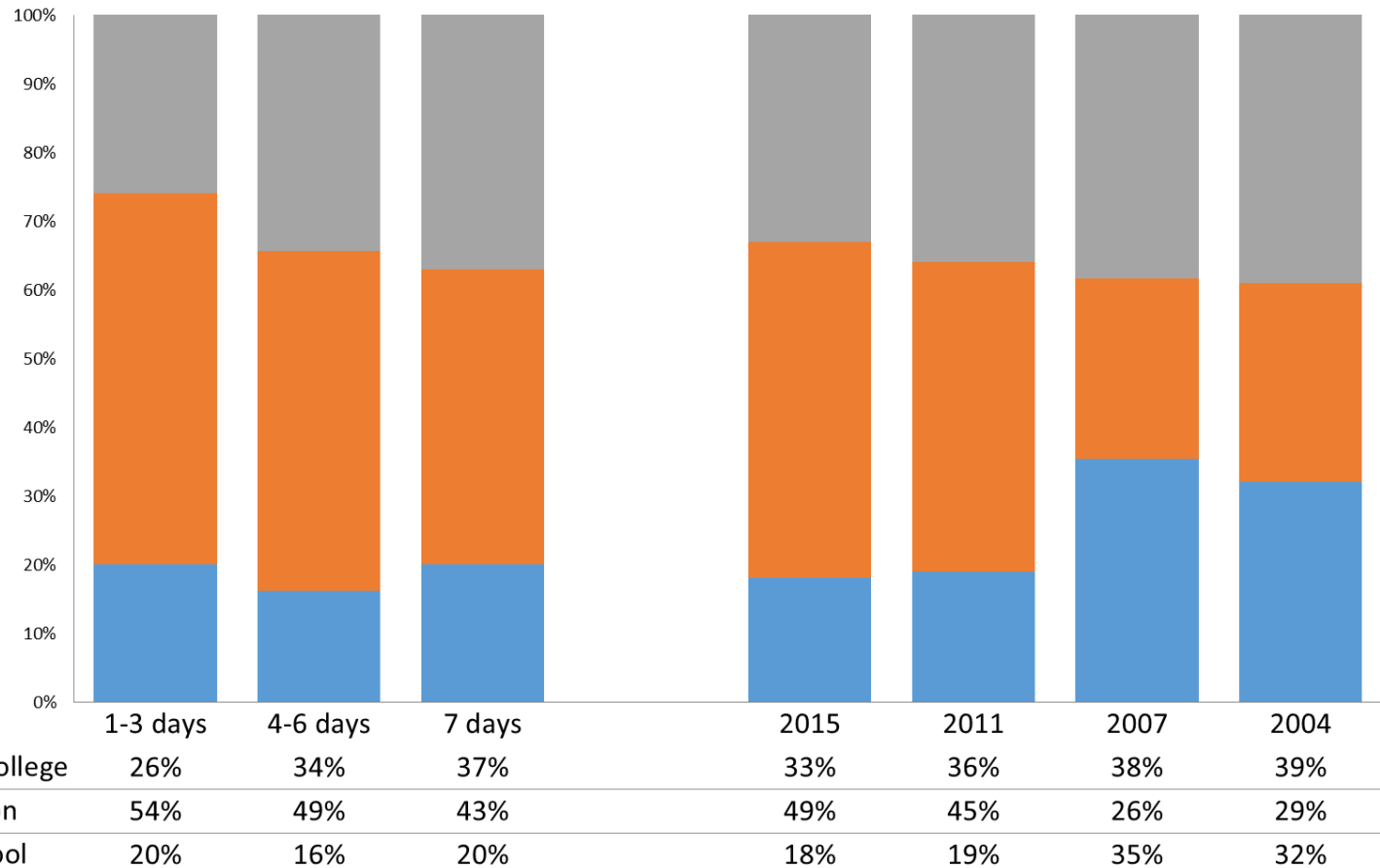
Students & non-students - 2015



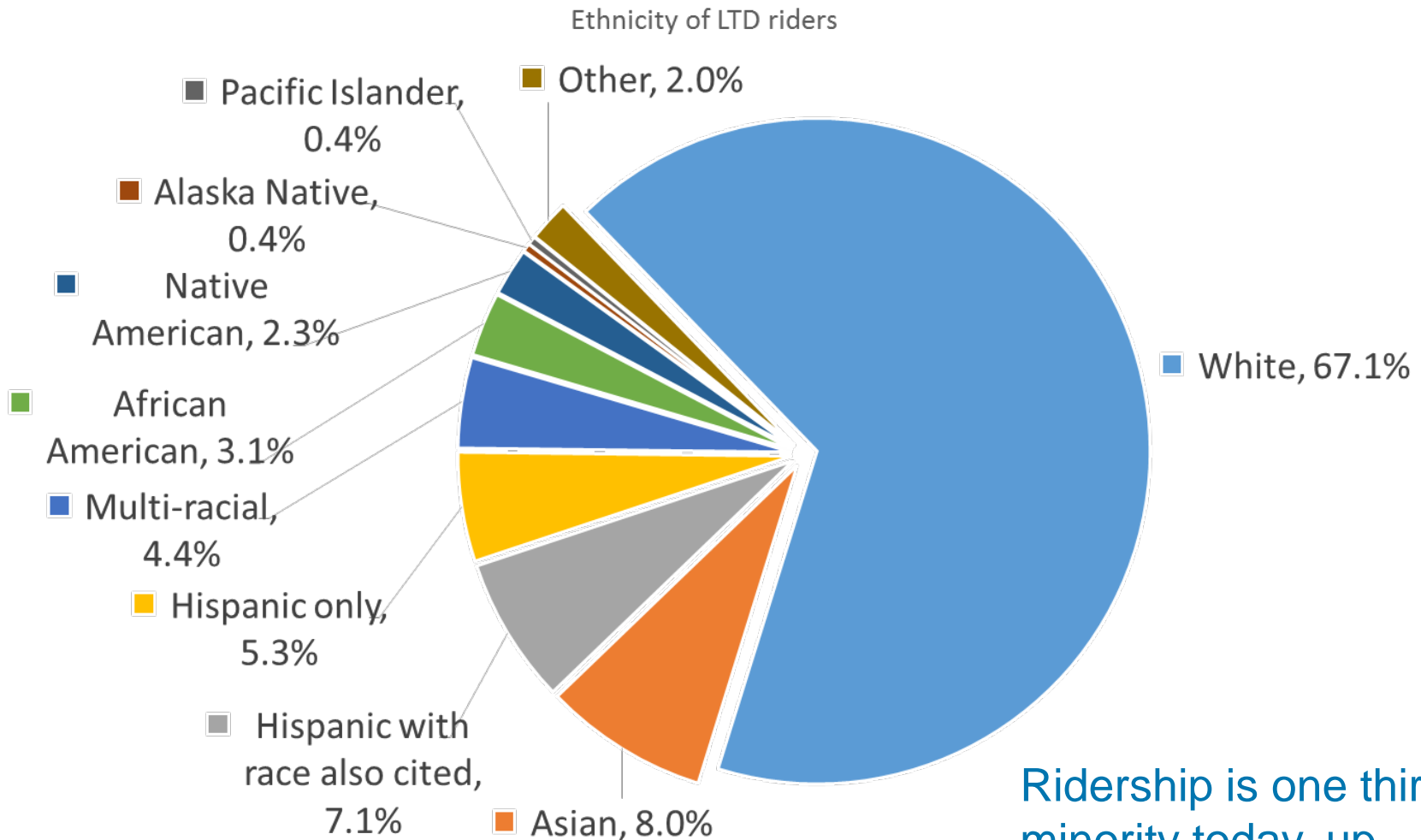
Students by School

Among 43% of all riders who are students...

What schools do student riders attend?



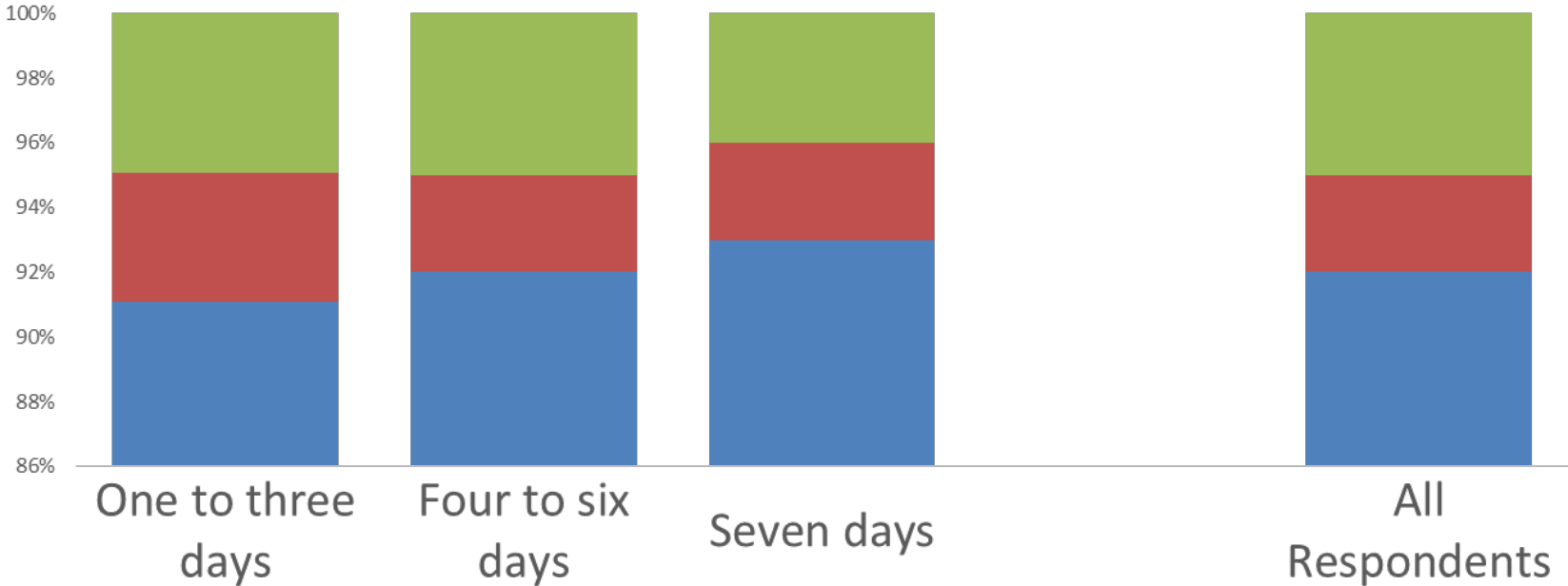
Ethnicity



Ridership is one third minority today, up from 25% in 2011

Language

Q27 Language spoken at home



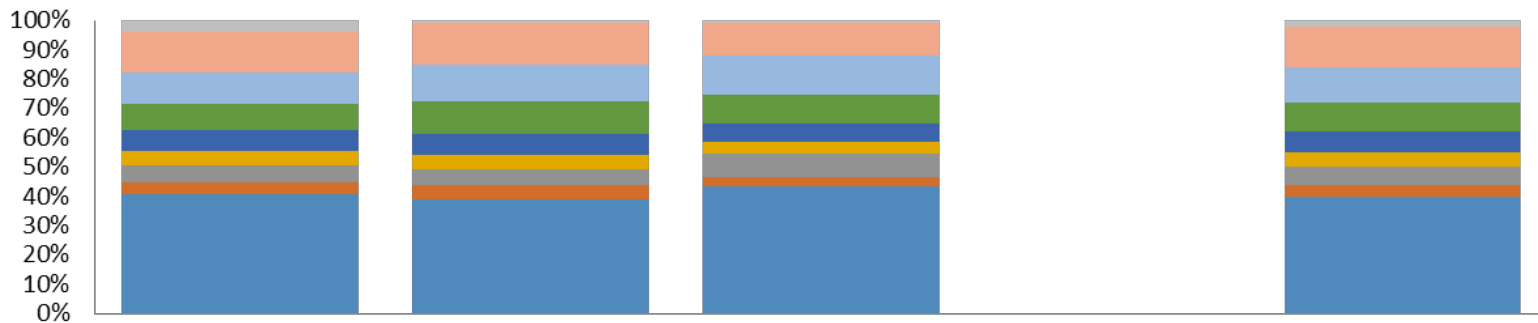
Language spoken at home	One to three days	Four to six days	Seven days	All Respondents
Other	5%	5%	4%	5%
Spanish	4%	3%	3%	3%
English	92%	92%	93%	92%

96% of riders speak English well or very well

Travel Profile

Duration of Ridership

Year started using LTD, by rider Frequency Segments

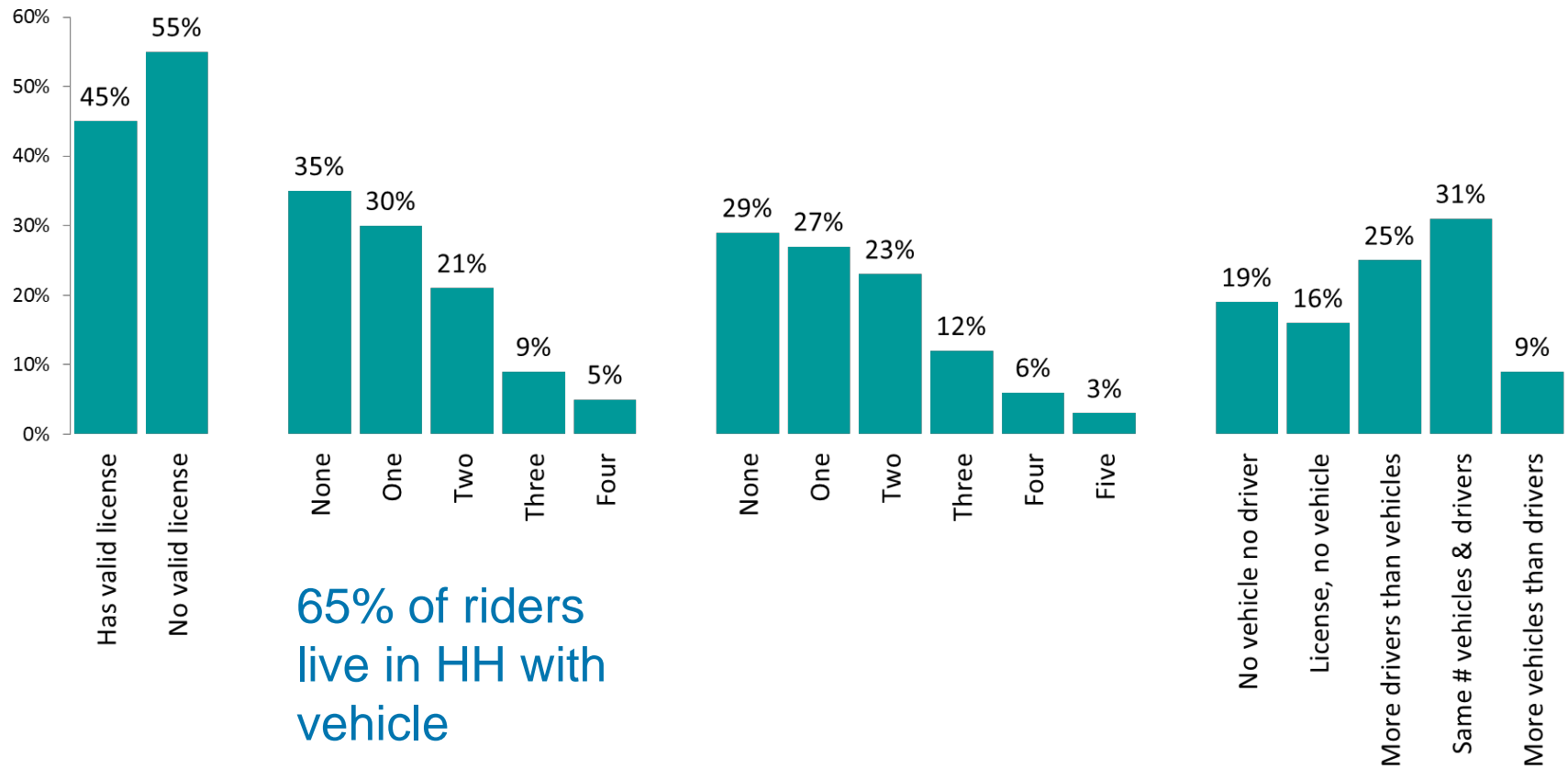


	1-3 days	4-6 days	7 days	All LTD Riders 2015
First time riding	4%	1%	1%	2%
Less than one year	14%	14%	11%	14%
1 year	11%	12%	13%	12%
2 years	9%	11%	10%	10%
3 years	7%	7%	6%	7%
4 years	5%	5%	4%	5%
5 years	6%	5%	8%	6%
6 years	4%	5%	3%	4%
7+ years	41%	38%	43%	40%

28% of riders have been riding LTD less than

Transportation Options within Household

All LTD riders 2015



65% of riders
live in HH with
vehicle

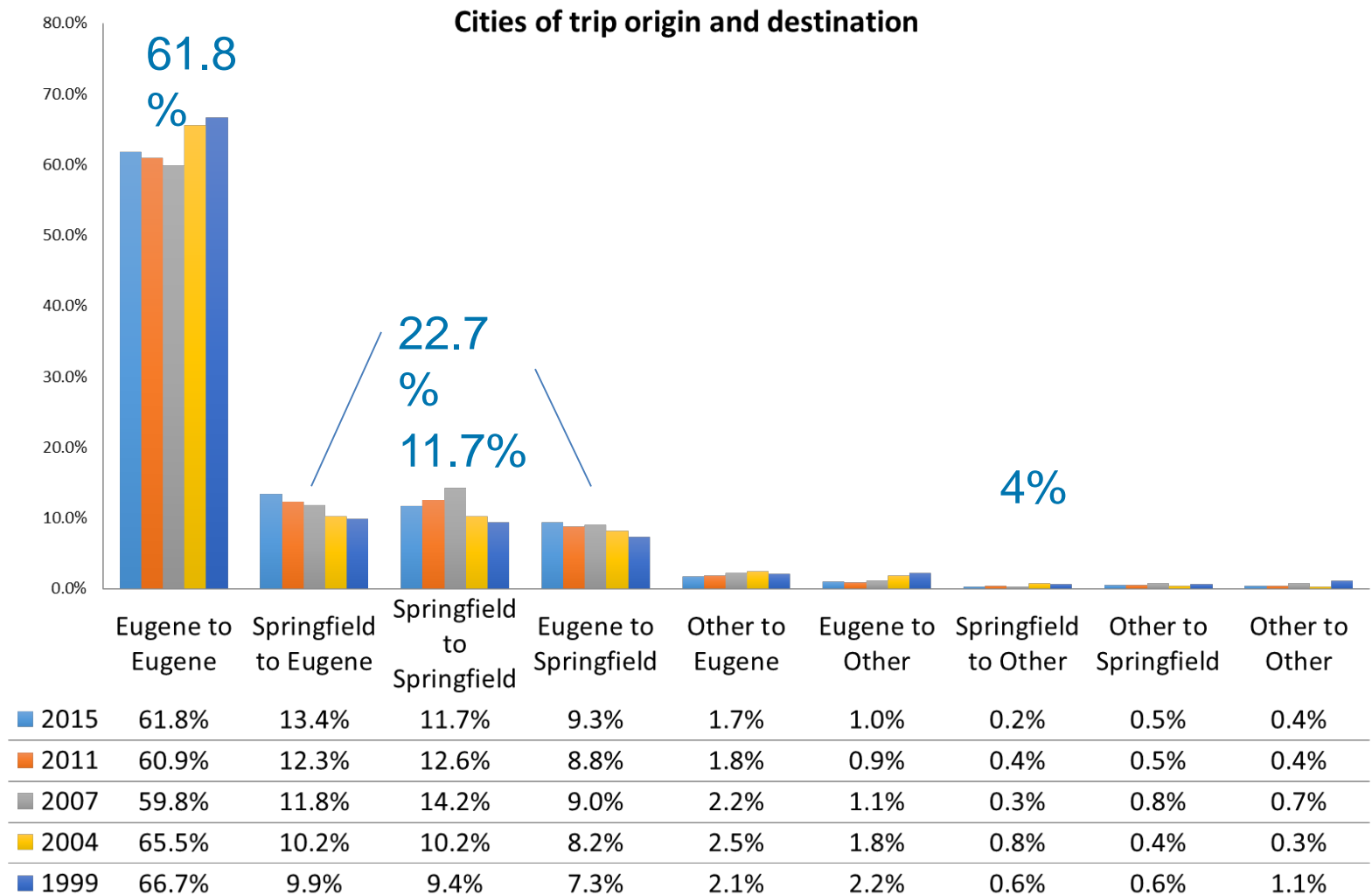
Does respondent
have a diver's
license?

Vehicles in household

Licensed drivers in household

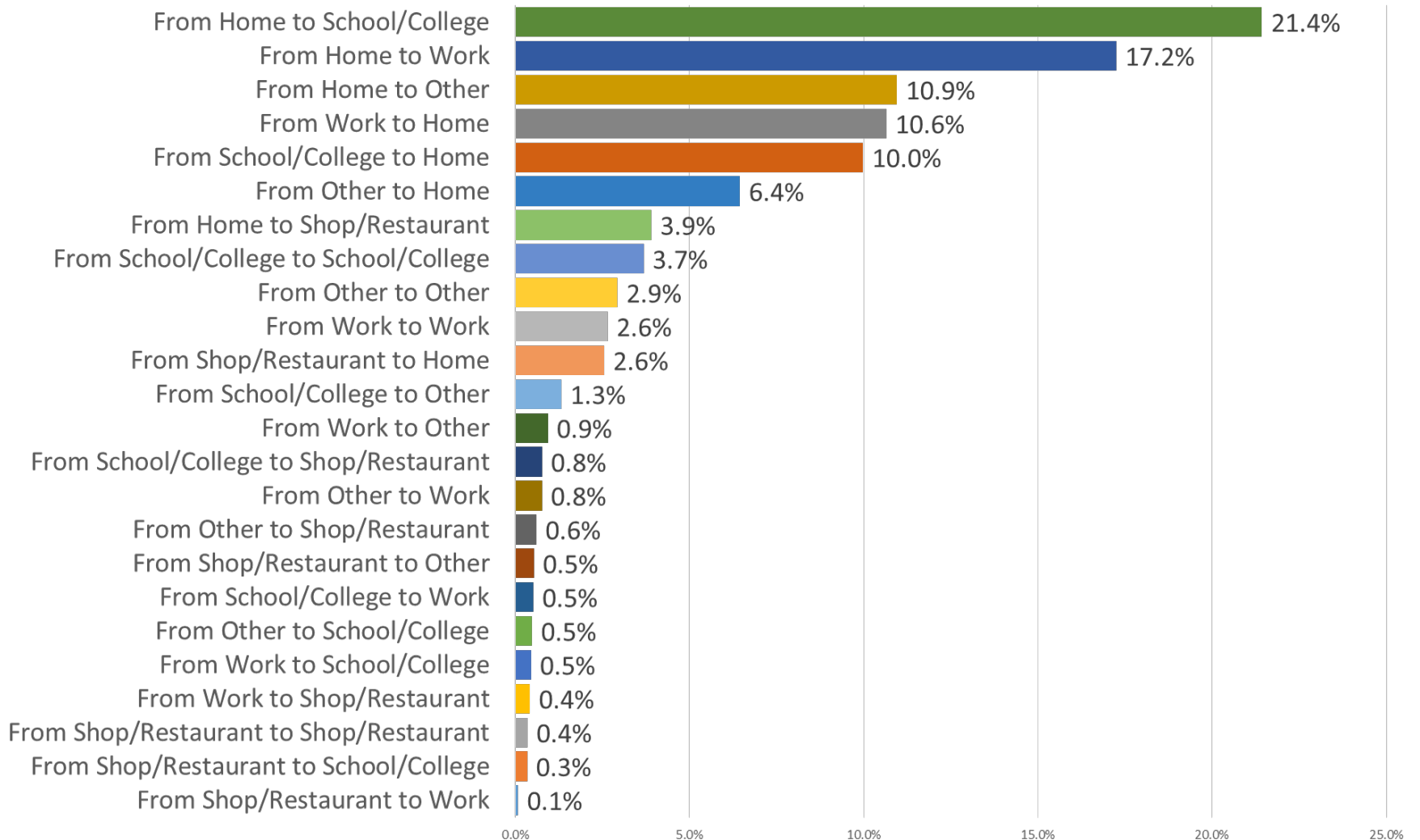
Transport option

Travel Patterns



Origin & Destination Types

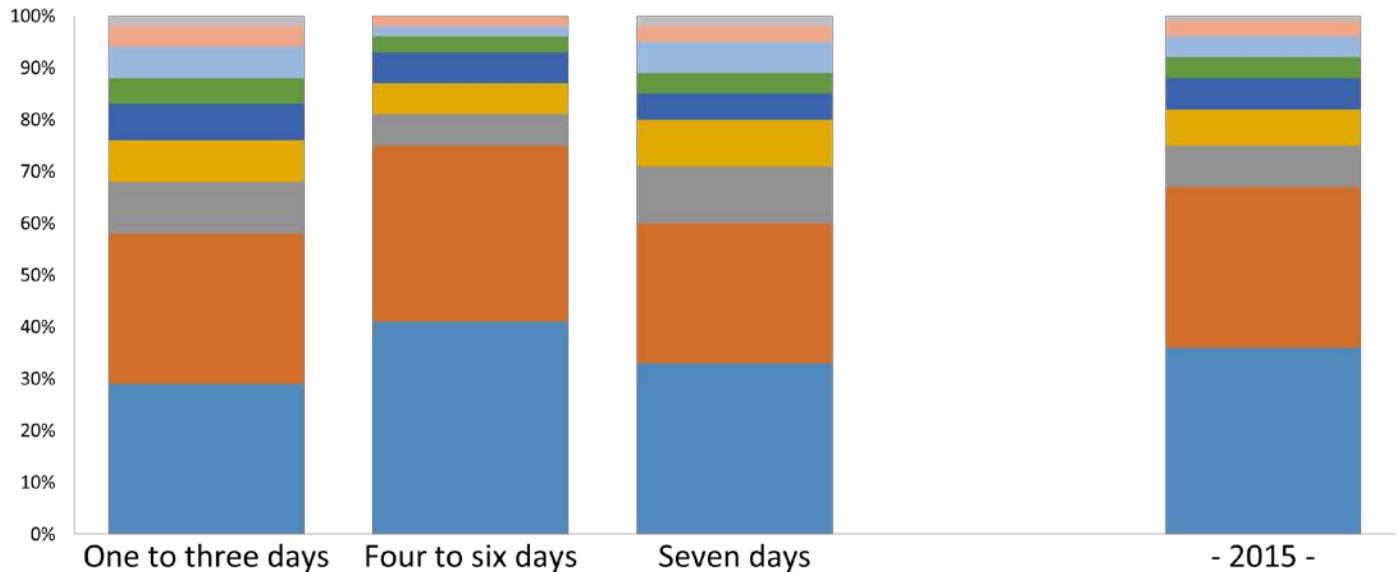
Percent of all trips between origins and destinations



Trip Purpose

73% of trips are to or from work or school

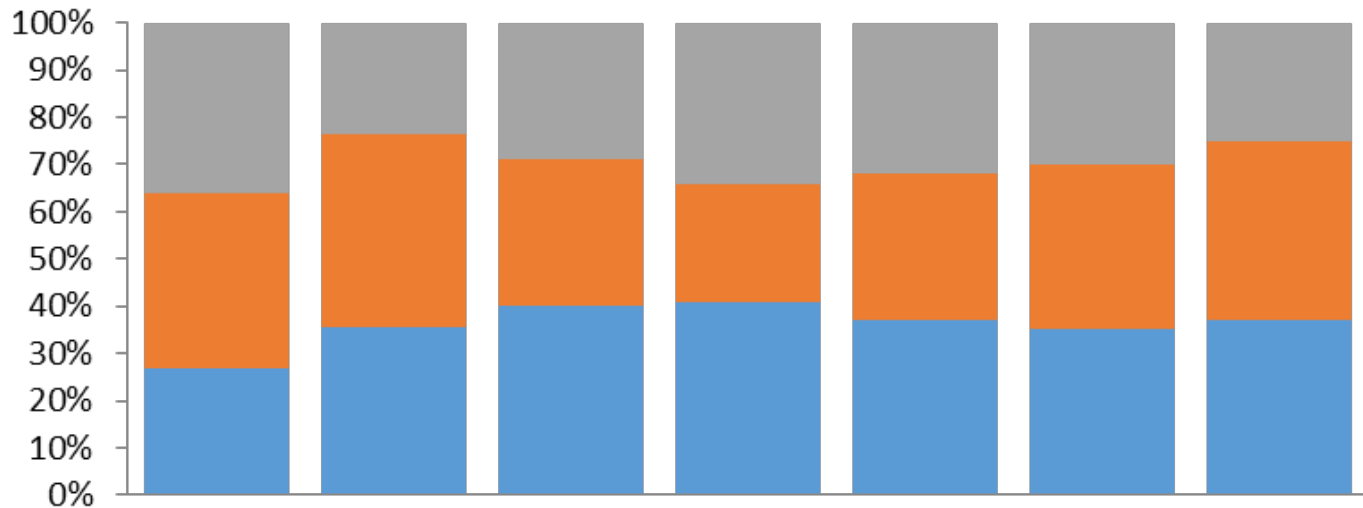
Trip Purpose 2015



	One to three days	Four to six days	Seven days	- 2015 -
■ Social service aptmt	2%	1%	2%	2%
■ Medical/Dental	4%	2%	3%	3%
■ Other	6%	2%	6%	4%
■ Entertainment/recreation	5%	3%	4%	4%
■ Middle/HS	7%	6%	5%	6%
■ Visiting others	8%	6%	9%	7%
■ Store or restaurant	10%	6%	11%	8%
■ College	29%	34%	27%	31%
■ Work	29%	41%	33%	36%

Trip Purpose

Change in Trip Purposes

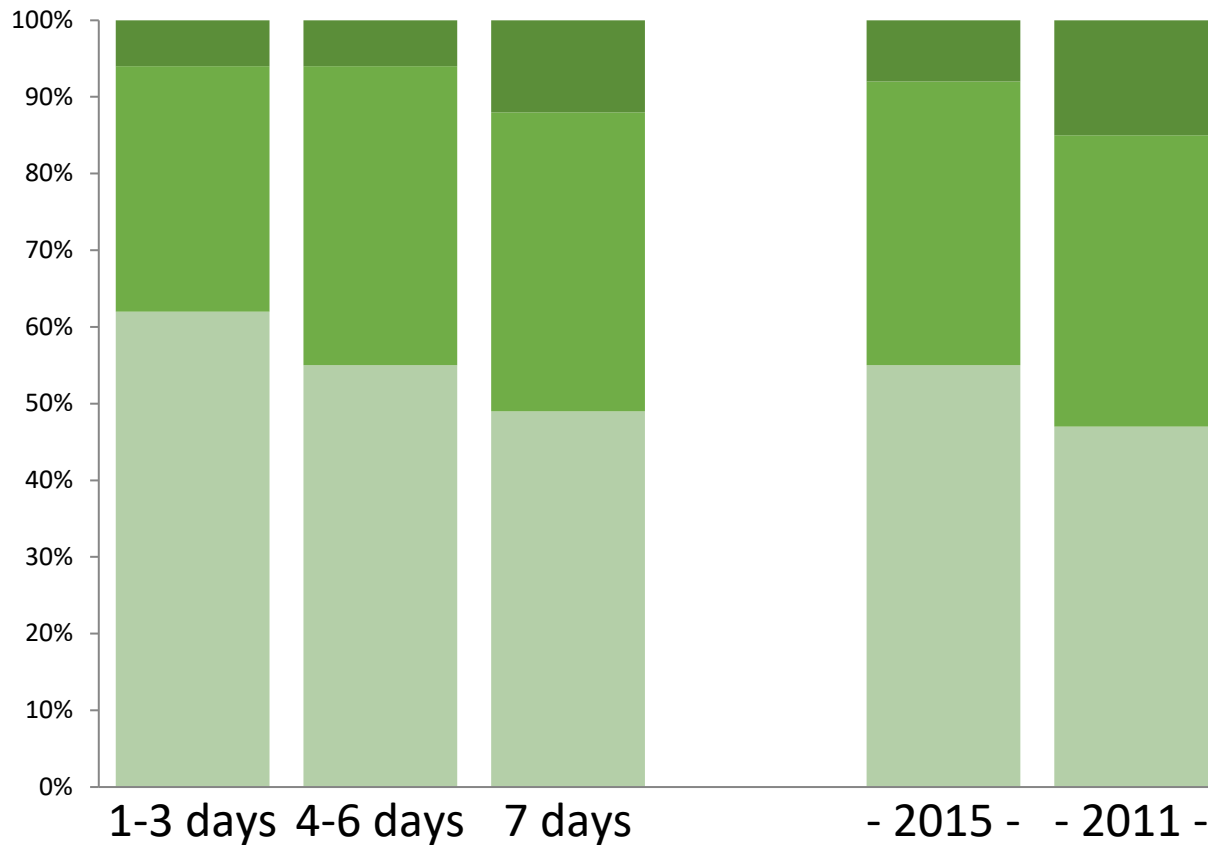


	2015	2011	2007	2004	1999	1994	1990
■ Work	36%	23%	29%	34%	32%	30%	25%
■ School	37%	41%	31%	25%	31%	35%	38%
■ Other	27%	36%	40%	41%	37%	35%	37%

Oregon Unemployment was rising in 2007 and quite high

Transferring

Number of buses used for this one-way trip

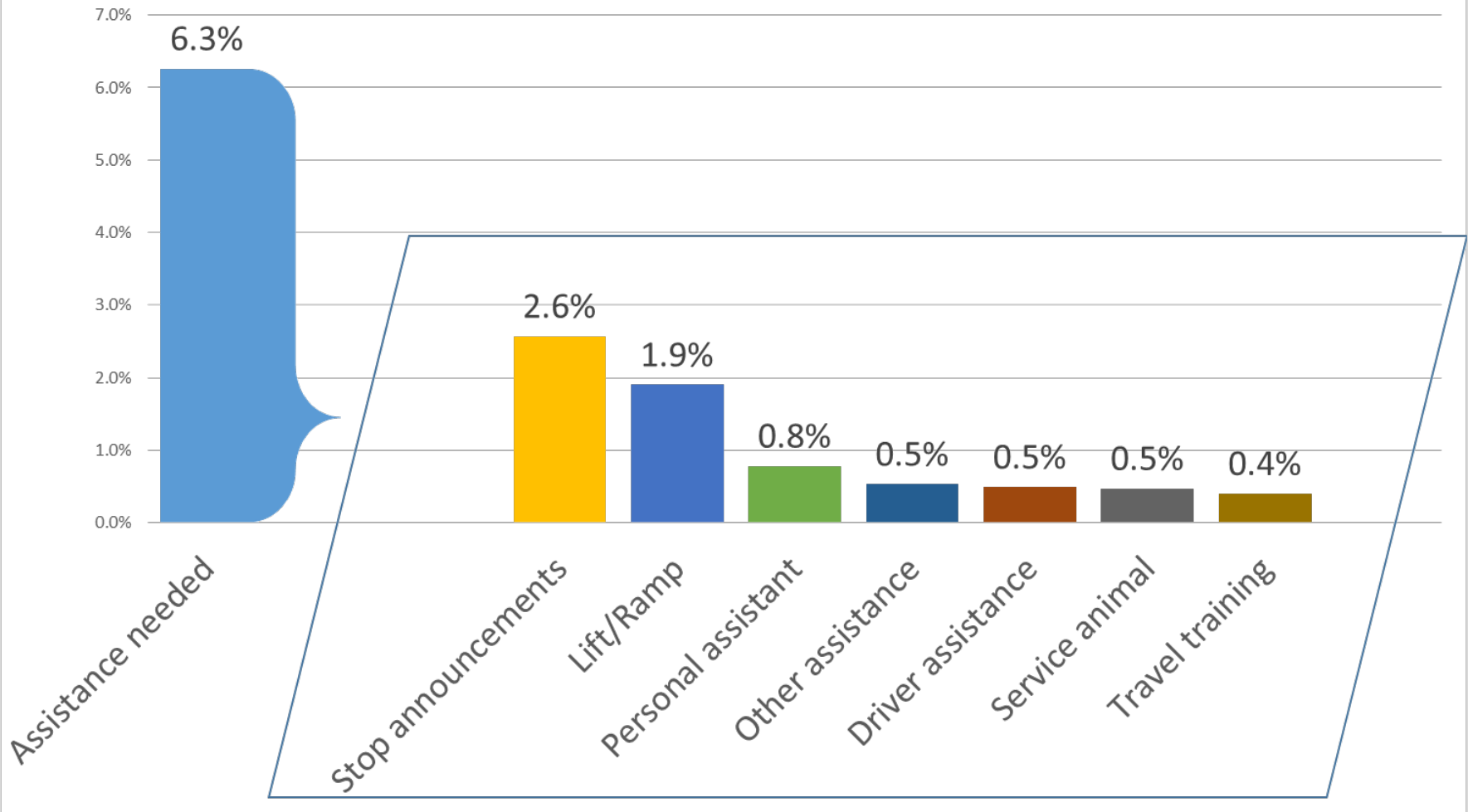


■ Three buses	6%	6%	12%	8%	15%
■ Two buses	32%	39%	39%	37%	38%
■ One bus	62%	55%	49%	55%	47%

More riders are now able to complete their trip on a single bus

Assistance Needed to use LTD

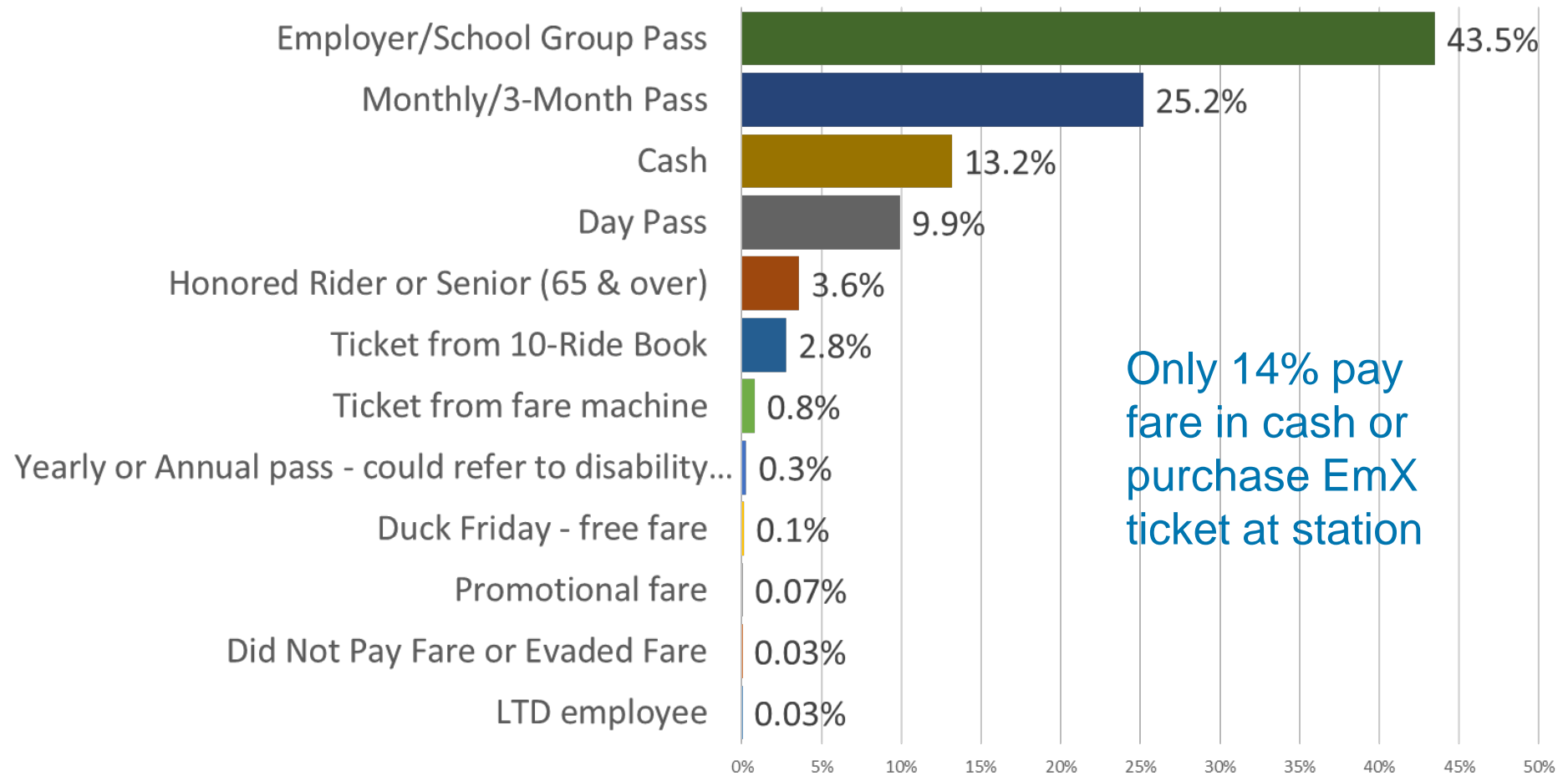
Yes - assistance needed



14% of riders over 60 need assistance

Fare Media

Q11 Detail of fare distribution

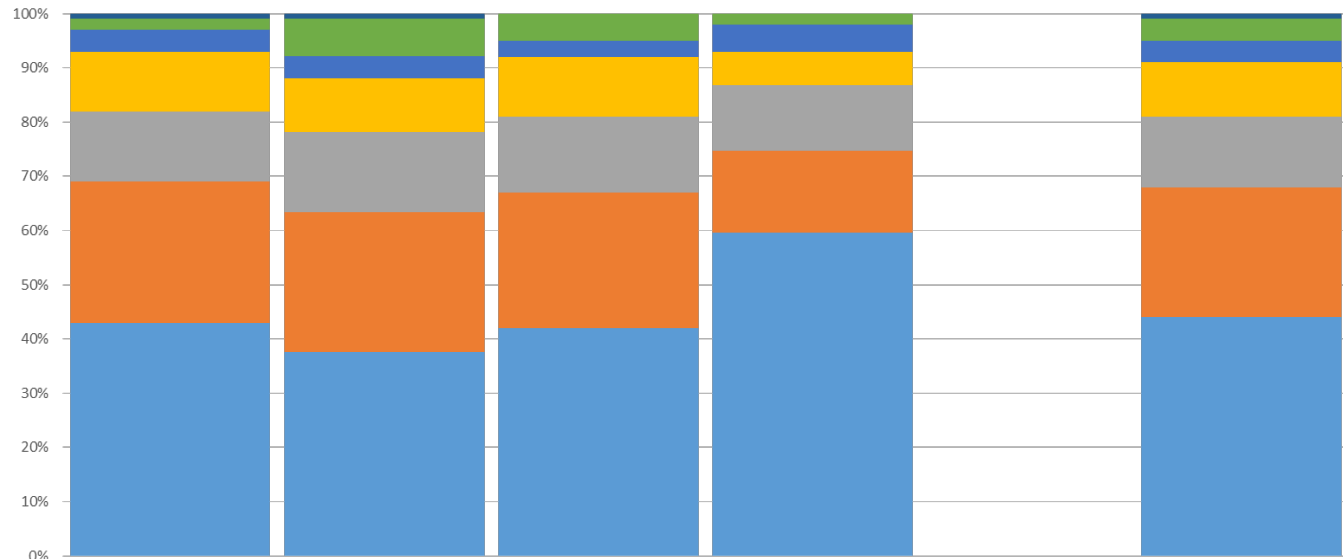


Fare Media By Income

NOTE: Data analysis includes a variety of crosstabs relevant to Title VI

Low Income riders are no more likely than others to pay fare in cash.

Household income and fare used for this trip



	Less than \$10,000	\$10,000 to \$24,999	\$25,000 to \$44,999	\$45,000 or more	All Respondents
--	--------------------	----------------------	----------------------	------------------	-----------------

Other	1%	1%	0%	0%	1%
-------	----	----	----	----	----

Free (all categories, including Honored Rider)

Free (all categories, including Honored Rider)	2%	7%	5%	2%	4%
--	----	----	----	----	----

Ticket (Ten ride or from machine)

Ticket (Ten ride or from machine)	4%	4%	3%	5%	4%
-----------------------------------	----	----	----	----	----

Day pass

Day pass	11%	10%	11%	6%	10%
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Cash

Cash	13%	15%	14%	12%	13%
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Monthly/3 month pass

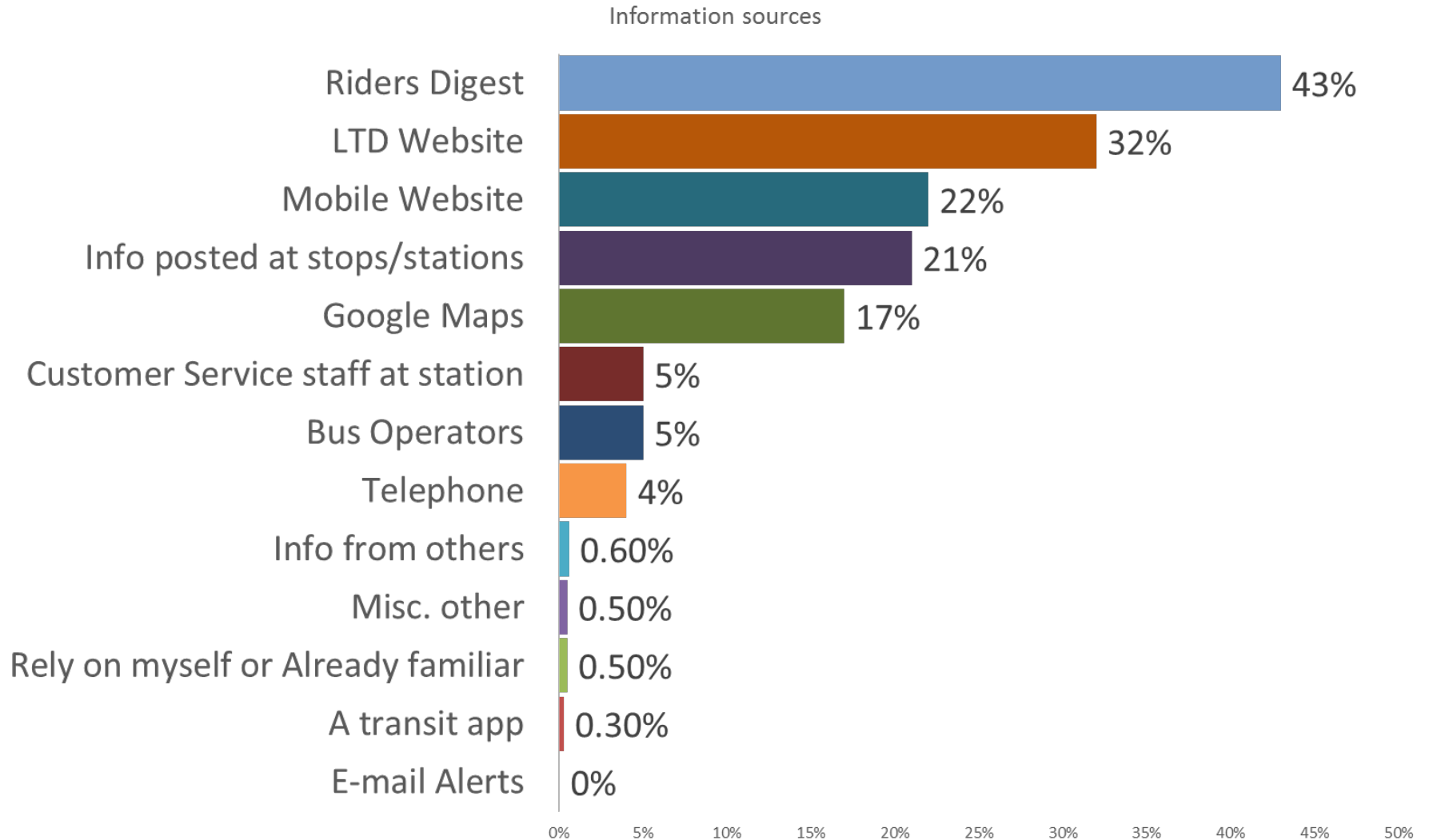
Monthly/3 month pass	26%	26%	25%	15%	24%
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School/Employer

School/Employer	43%	38%	42%	59%	44%
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Communications

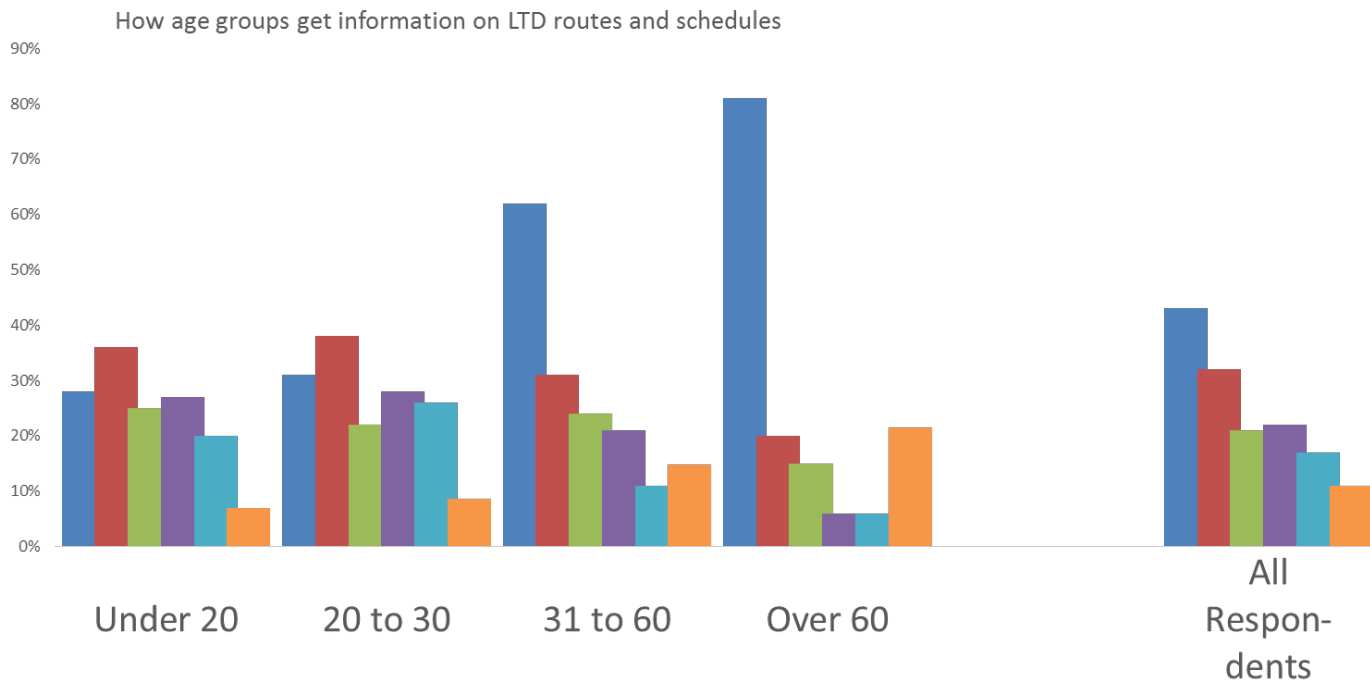
Information Sources Used



Information Sources Used By Age Group

Information sources vary significantly with age.

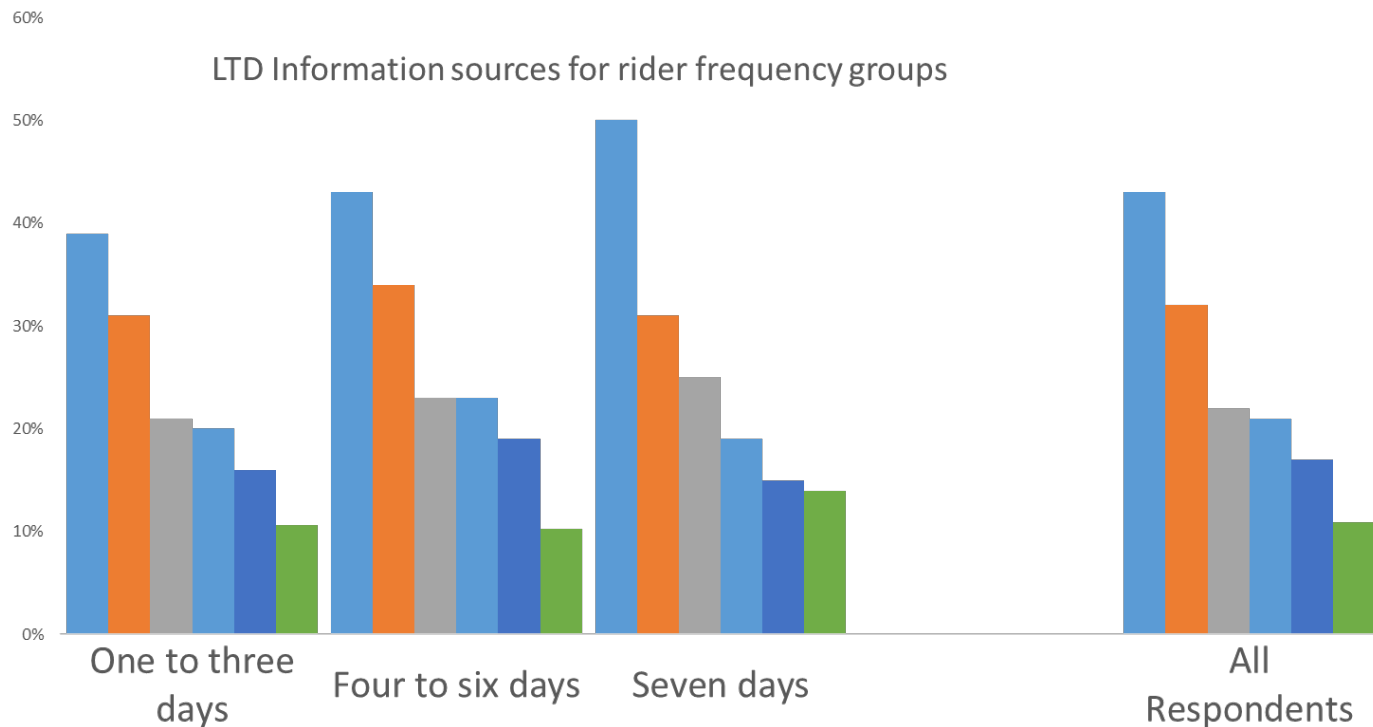
Younger riders tend to use multiple sources of info.



How do you get route and schedule information for LTD?

Information Source	Under 20	20 to 30	31 to 60	Over 60	All Respondents
Riders Digest	28%	31%	62%	81%	43%
LTD Website	36%	38%	31%	20%	32%
Info posted at stops/stations	25%	22%	24%	15%	21%
Mobile Website	27%	28%	21%	6%	22%
Google Maps	20%	26%	11%	6%	17%
Riders asks info staff or driver	7%	9%	15%	22%	11%

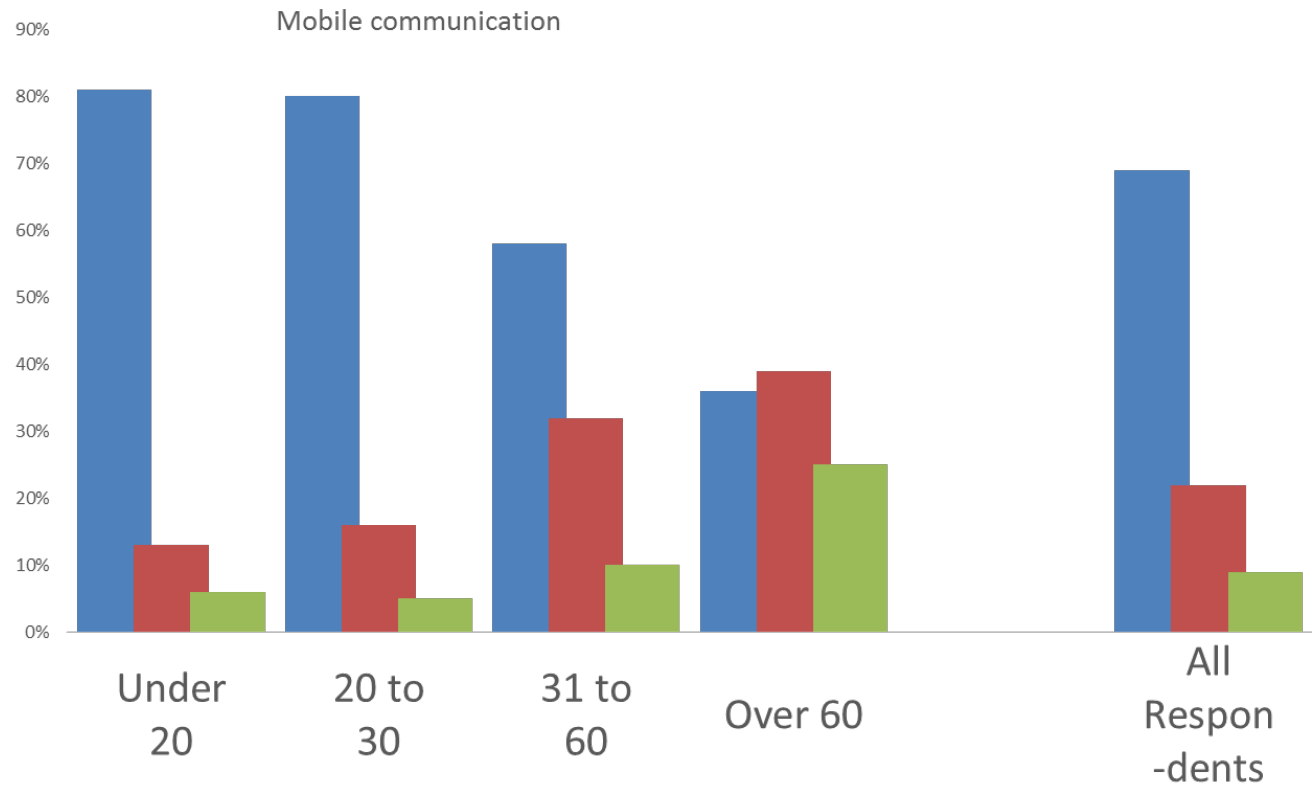
Information Sources Used By Frequency Group



Riders Digest	39%	43%	50%	43%
LTD Website	31%	34%	31%	32%
Mobile Website	21%	23%	25%	22%
Info posted at stops/stations	20%	23%	19%	21%
Google Maps	16%	19%	15%	17%
Riders asks info staff or driver	11%	10%	14%	11%

Mobile Phone Usage By Age Group

Pew Research shows that nationally 65% of population use Smartphones.



■ Smartphone with Internet access

■ Conventional cell phone

■ No mobile phone

81%

80%

58%

36%

69%

13%

16%

32%

39%

22%

6%

5%

10%

25%

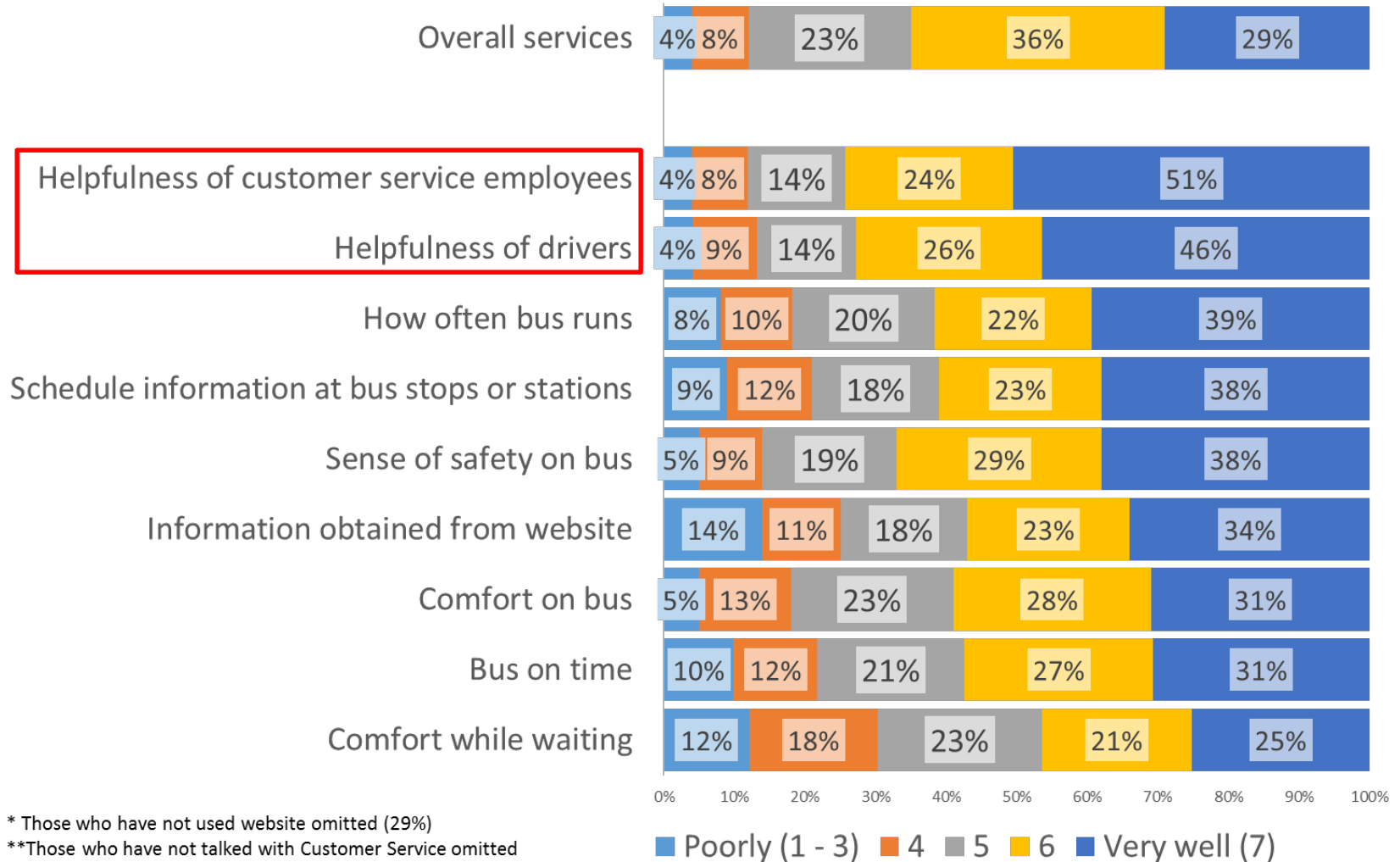
9%

Service Ratings

Service Ratings

Seven Point Scale

Service ratings



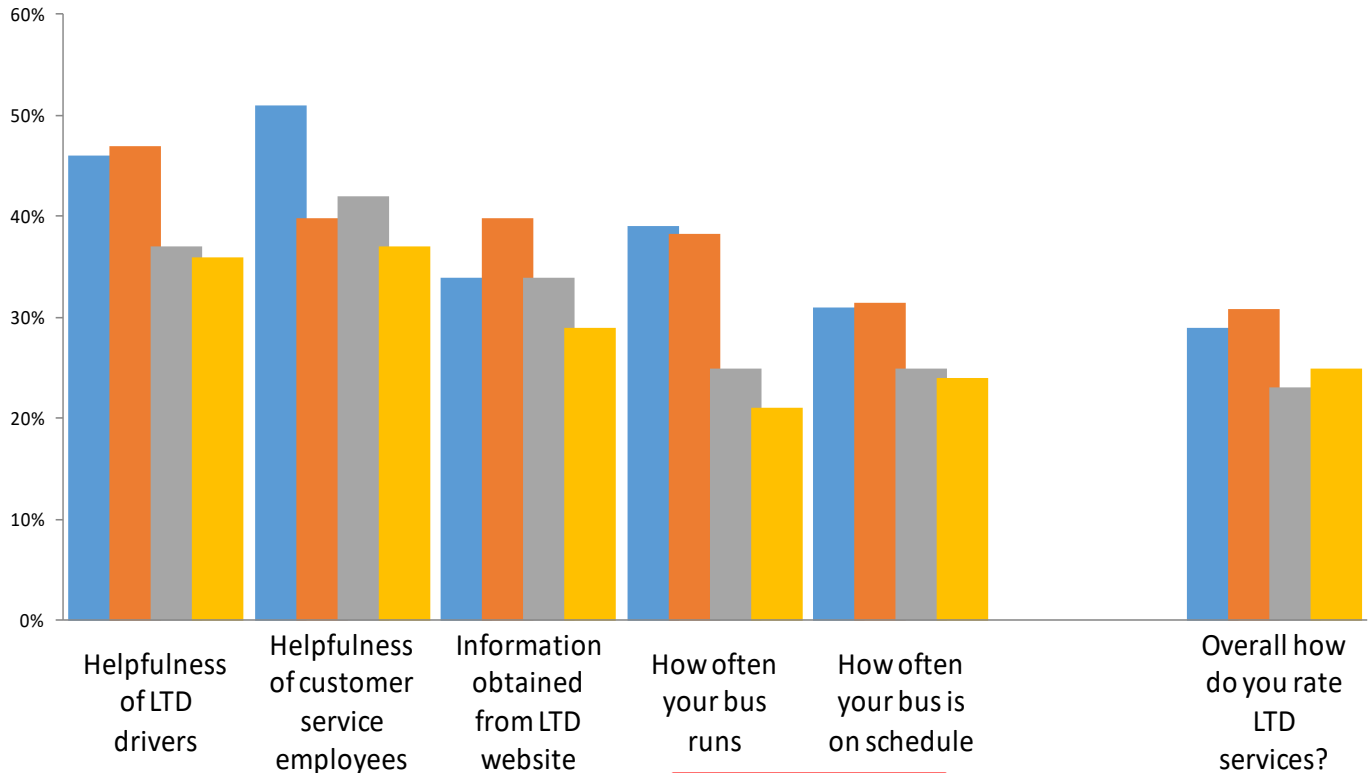
* Those who have not used website omitted (29%)

**Those who have not talked with Customer Service omitted

Service Ratings Over Time

Comparison of 2015, 2011, 2007 and 2004 ratings of questions in common

(Note: Only the top score is reported for each year. Wording of top score was changed in 2011 from "Excellent" to "Very well" and the rating scale was changed from 7 points to 5.

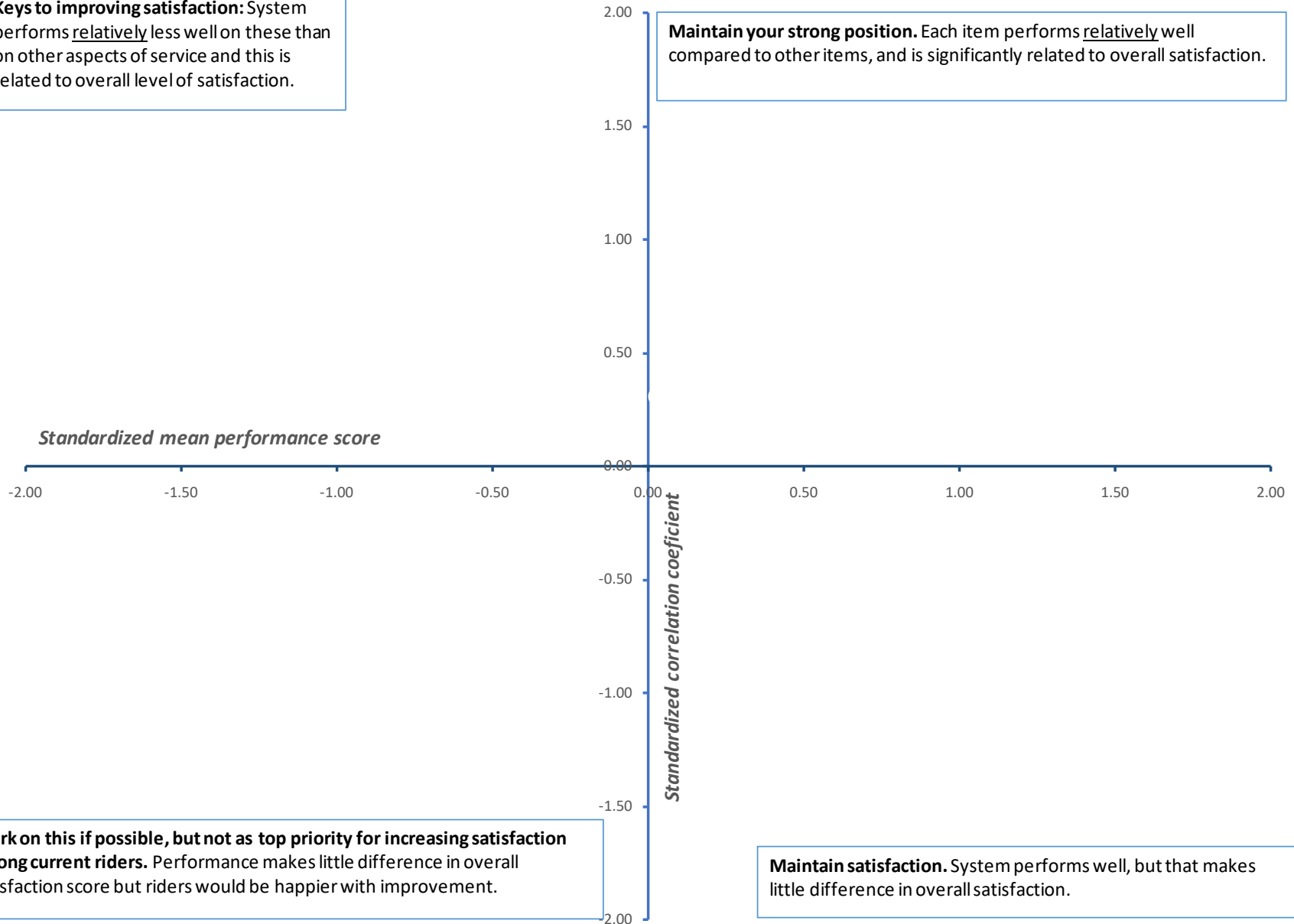


	Helpfulness of LTD drivers	Helpfulness of customer service employees	Information obtained from LTD website	How often your bus runs	How often your bus is on schedule	Overall how do you rate LTD services?
■ "Very well" 2015 (7 pt scale)	46%	51%	34%	39%	31%	29%
■ "Very well" 2011 (5 pt scale)	47%	40%	40%	38%	32%	31%
■ "Excellent" 2007 (7 pt scale)	37%	42%	34%	25%	25%	23%
■ "Excellent" 2004 (7 pt scale)	36%	37%	29%	21%	24%	25%

Correlation of Mean Ratings with Overall Rating

Keys to improving satisfaction: System performs relatively less well on these than on other aspects of service and this is related to overall level of satisfaction.

Maintain your strong position. Each item performs relatively well compared to other items, and is significantly related to overall satisfaction.



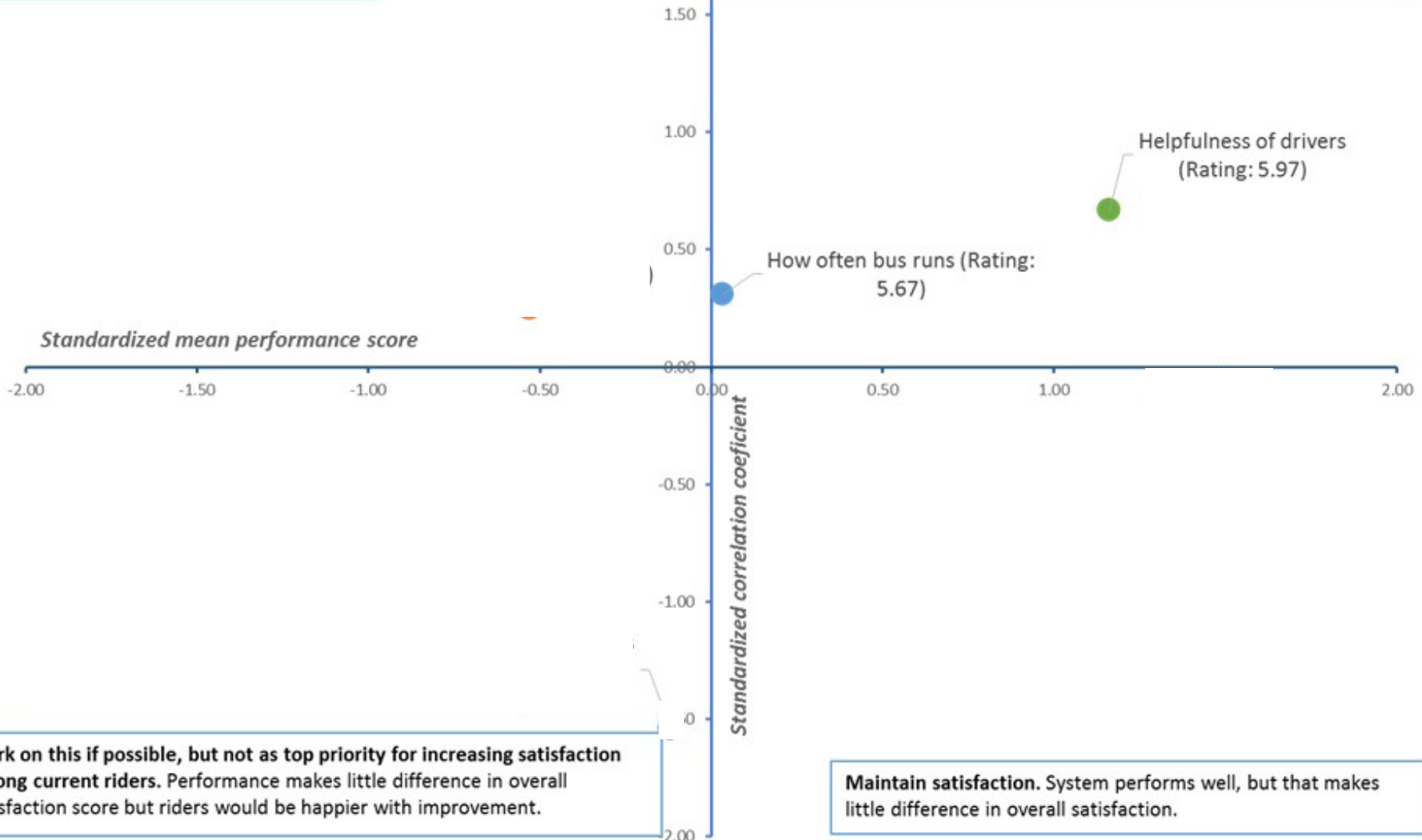
Work on this if possible, but not as top priority for increasing satisfaction among current riders. Performance makes little difference in overall satisfaction score but riders would be happier with improvement.

Maintain satisfaction. System performs well, but that makes little difference in overall satisfaction.

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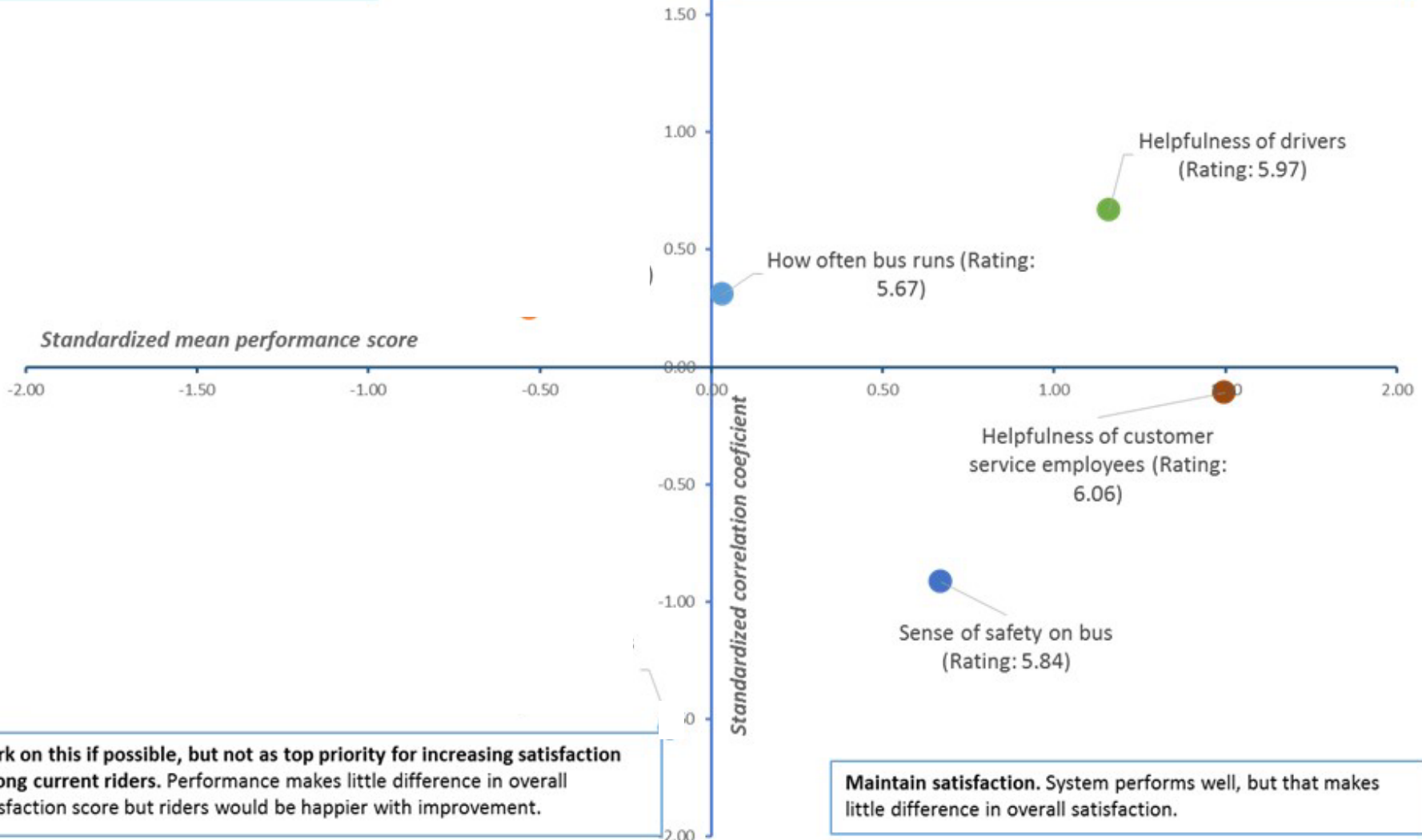
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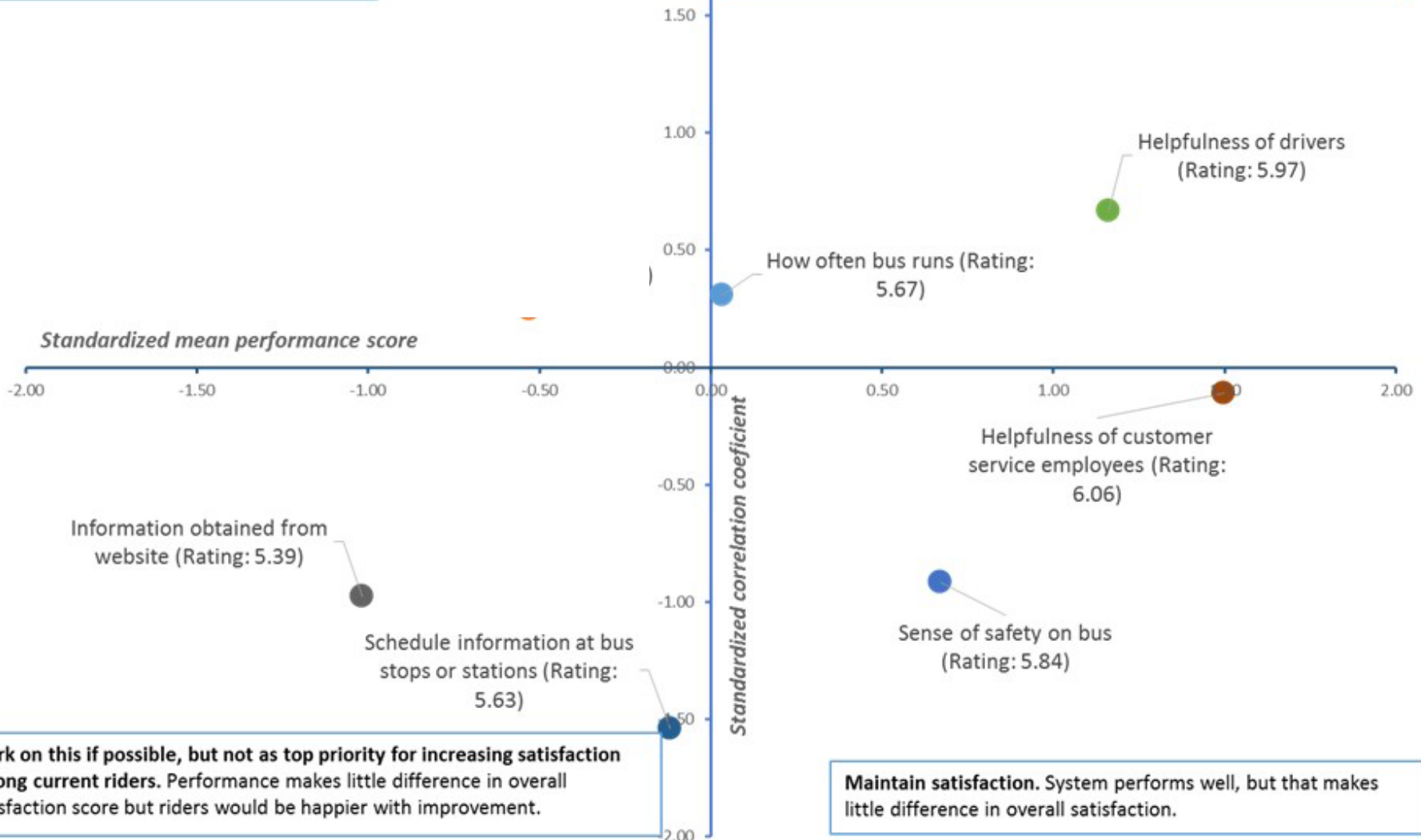
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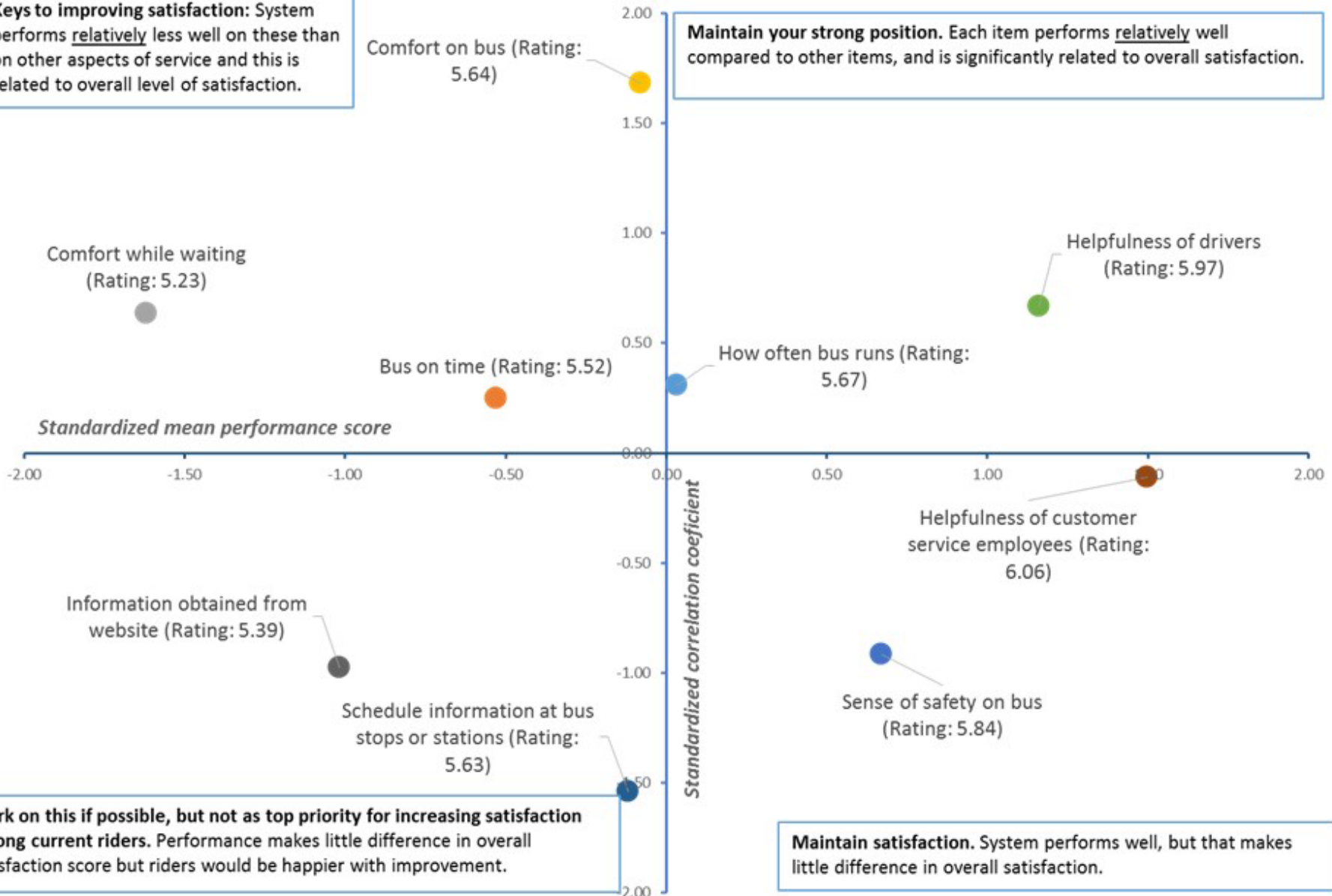
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EmX Riders

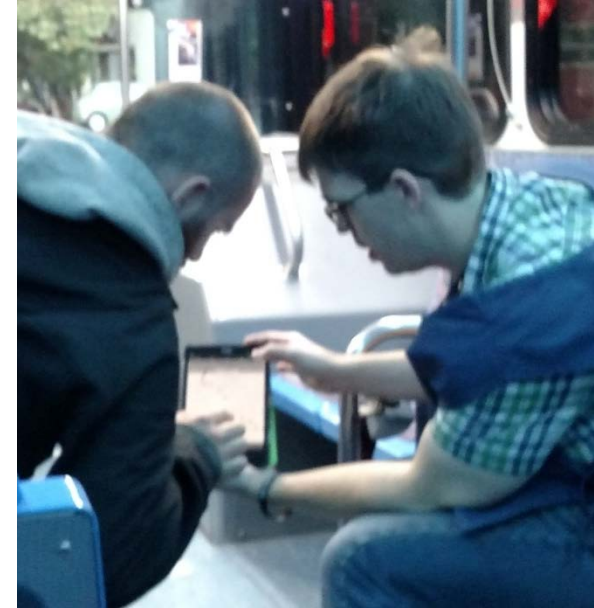
Compared to Riders on Other Routes

- EmX riders are generally quite similar to riders on other routes.
- Minor differences include:
 - More likely to drive to stop (6% vs 1%)
 - More likely to be commuting to work (39% vs 33%)
 - More likely to use only one bus (67% vs 57%)
 - More likely to pay with an employer or school group pass (50% vs 36%)

Tablet Pilot Survey

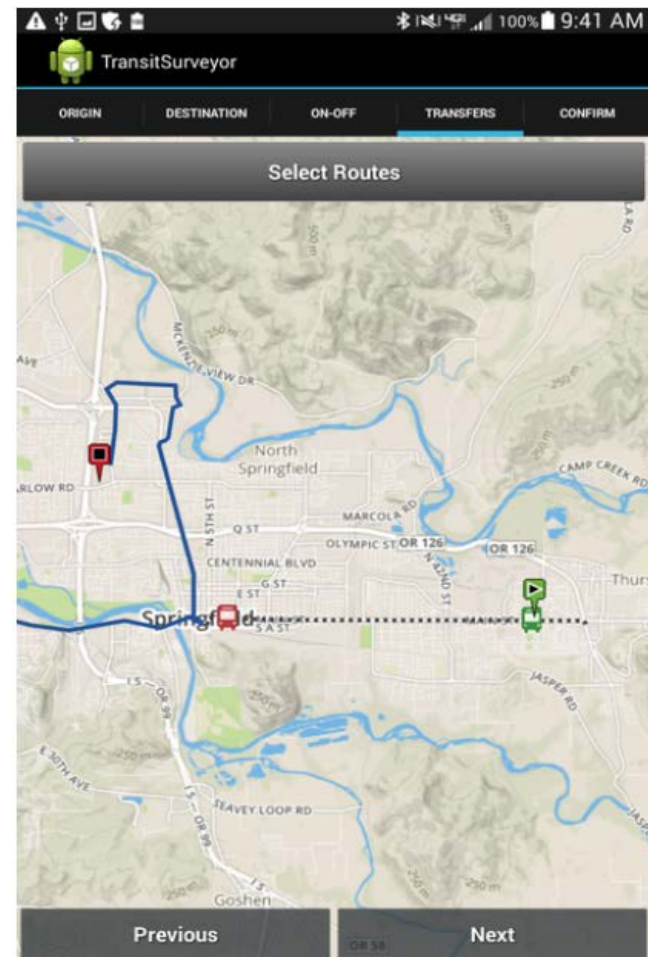
Tablet Pilot Survey Objectives

- Effectiveness in collecting complete, geocodable origin-destination information.
- Potential bias introduced by conducting interviews orally and/or by having surveyors select passengers rather than surveying every passenger.
- Skill level required by surveyors to use tablet programming.
- Cost per geocodable interview relative to paper surveys.



Geocode Effectiveness

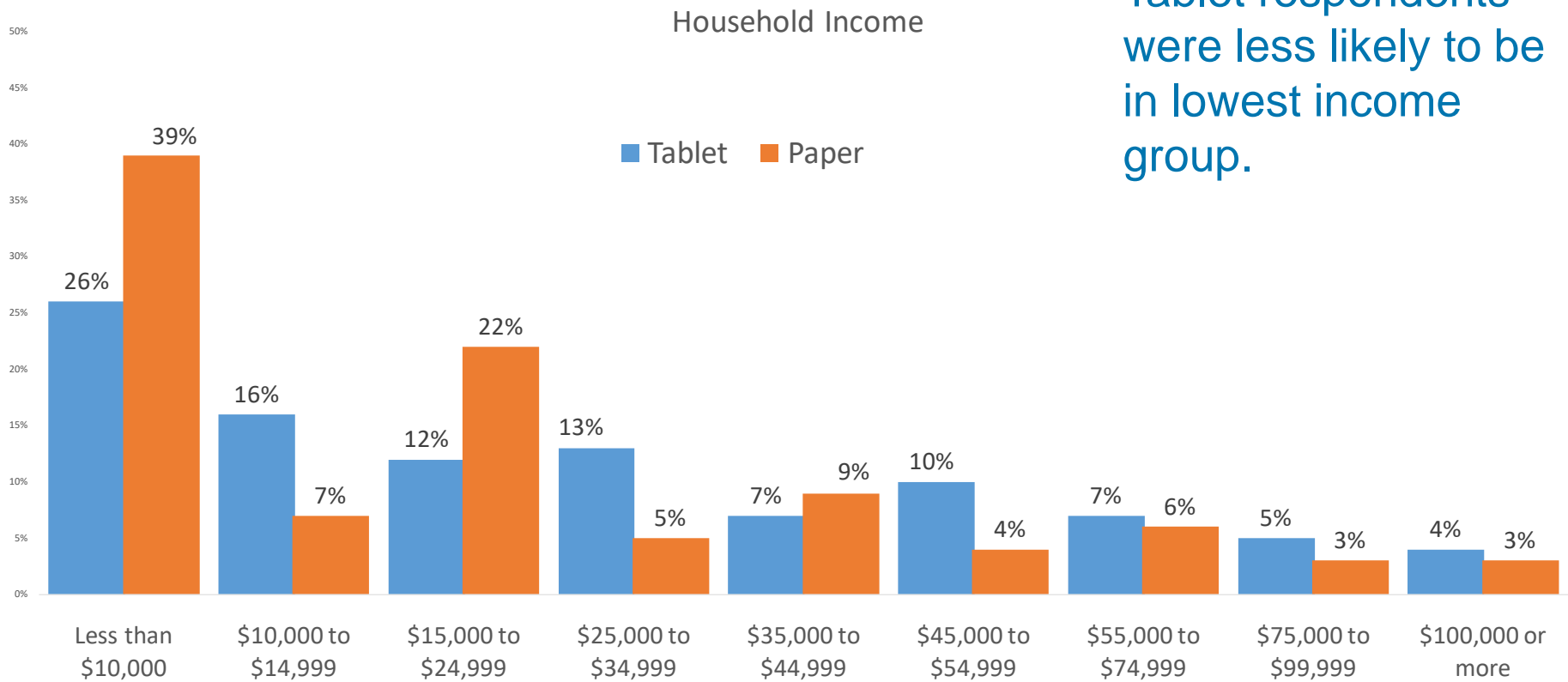
- Fewer non-useful responses (e.g. home to home)
- Fewer skipped questions
- 91% fully geocodable (compared to ~70% for paper survey)



Potential Sources of Bias

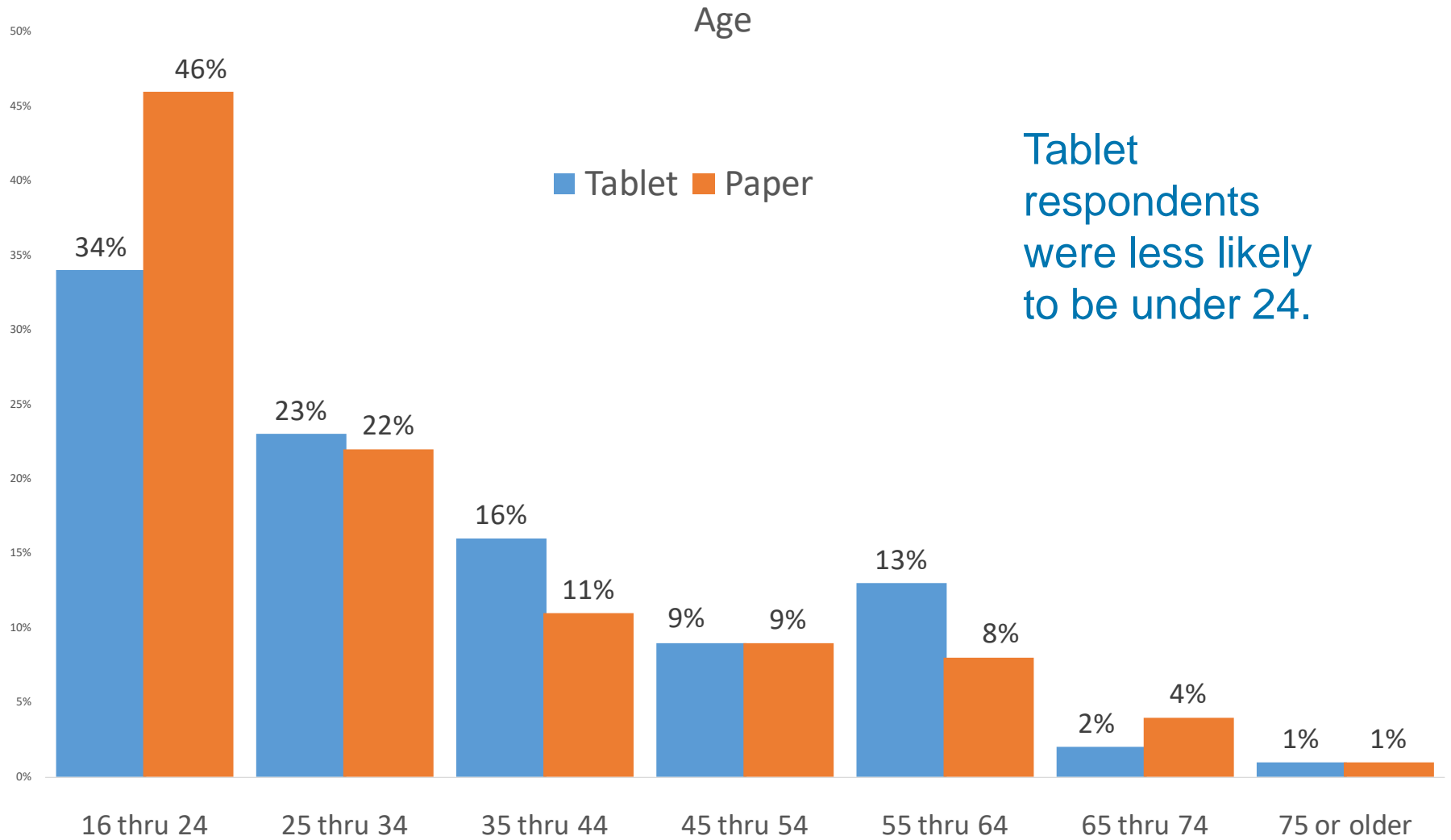
- Sampling of riders
- Variable response rates among rider segments
- Disproportional sampling of bus stops

Potential Bias Income



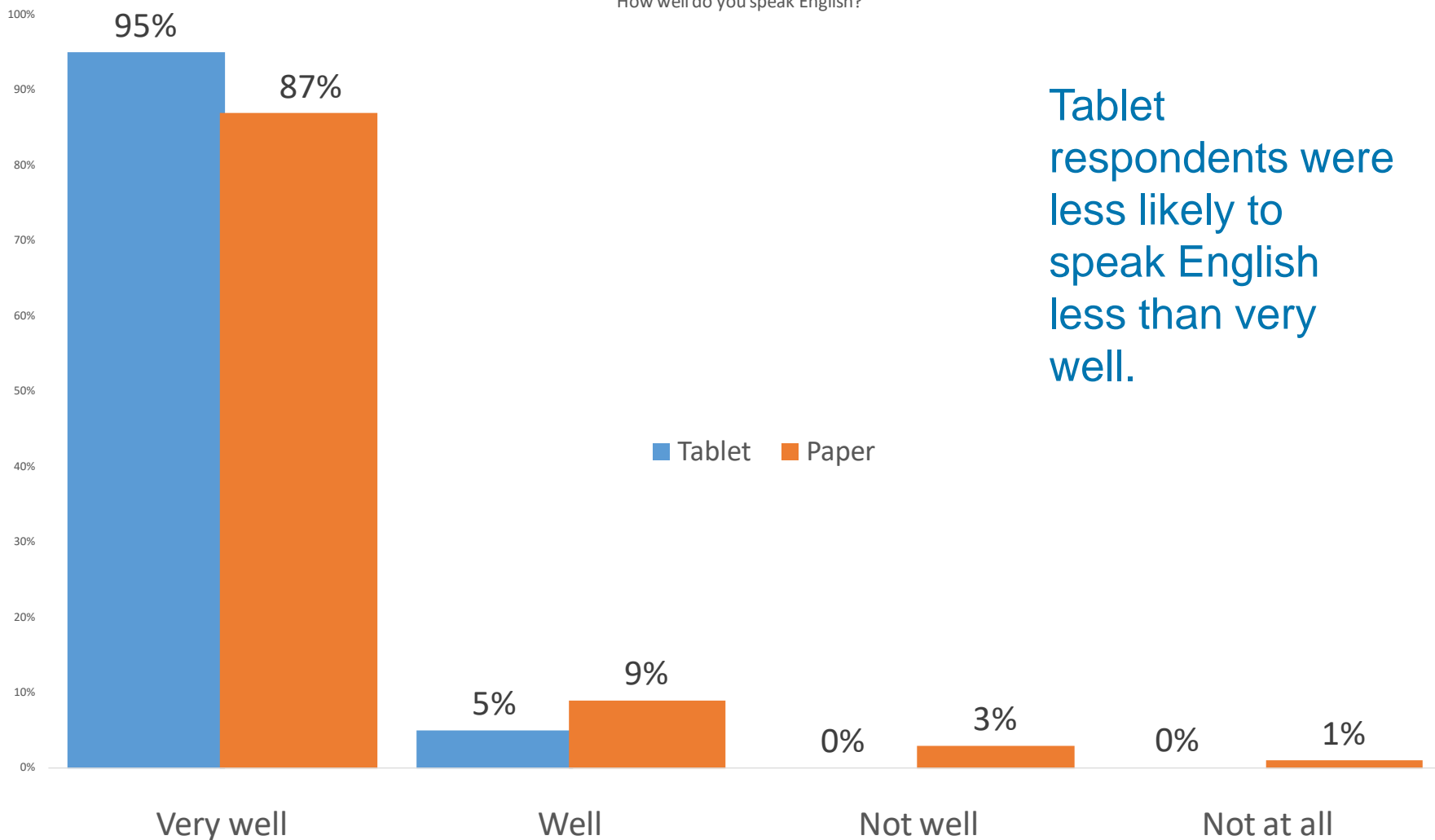
Tablet respondents were less likely to be in lowest income group.

Potential Bias Age



Potential Bias Language

How well do you speak English?



Tablet respondents were less likely to speak English less than very well.

Surveyor Skill Level

- Requires higher skill level of surveyors
- Longer learning curve
- Need multi-lingual surveyors or another option for non-English speaking riders



Cost Comparison of Tablet and Paper

Cost Comparison		
Marginal Costs	Tablet	Paper
Completed Interviews	266	6722
% Fully Geocodable	91%	65%
# Geocodeable cases	242	4,369
Surveyor Hours	77.25	534.25
Surveyor Cost	\$1,931	\$10,215
Minutes/ Interview	17.5	4.7
Surveyor Cost/Interview	\$7.26	\$1.52
Printing/shipping of paper	NA	
Other Marginal Costs	\$ 0.50	\$1.70
Data cleaning for paper survey	NA	\$0.19
Total Cost/Interview	\$7.76	\$3.41
Marginal Cost per geocodeable interview	\$8.53	\$5.25
Fixed costs		
Programming/Layout design	\$4,900	\$200
Assuming N=6,722 for both surveys		
Fixed cost per completed survey	\$0.729	\$0.03
Total cost per completion if N=6,722	\$8.489	\$3.44
Cost to complete 6,722 initial surveys	\$57,063	\$23,122
Resulting geocodeable N=	6,117	4,369
Full Cost per geocodeable interview	\$ 9.33	\$ 5.29

Tablet Survey cost about 75% more per geocodeable questionnaire

Recommended Use of Tablets

- Continue periodic paper survey but without detailed origin/destination
- Utilize a small team of tablet surveyors over a longer period of time to collect O/D data and basic demographics only.
- Use findings of paper survey and on/off counts to weight tablet data and eliminate bias.

Key Findings & Changes

Rider Profile

- Younger and lower income than population
- 43% of riders are students; only 19% are neither employed nor student
- 65% of riders have some level of transportation option within household
- Increased ethnic diversity
 - 1/3 of riders are minority
 - 12% are Hispanic
- EmX riders are very similar to other route riders

Travel Profile

- More riders are traveling to work, less to school and for other purposes
- Increase in number of riders making 4+ one-way trips per day
- More riders can complete their trip on a single bus – 58% today compared to 47% in 2011
- Only 14% pay fare with cash or EmX ticket; 43% are part of a employer/school fare program

Communications

- Riders Digest (43%) and LTD Website (32%) are the most use information sources
- Many riders use multiple information sources
 - 20-30% of users of all other information sources also use Riders Digest and LTD Website
- 69% of riders have a Smartphone

Service Ratings

- Overall service rating of 5.8 on a 7 point scale
- Customer service staff and drivers are highest rated aspects of service
- Comfort while waiting for bus is lowest rated aspect of service

Questions

Income Based Fare Program Survey Results

220 Respondents

Survey open from January 31 - February 28, 2018

How many buses do you ride in a typical day? (count each time you board a bus as 1 bus)

0 times	27						
1 time	13						
2 times	58						
3 times	12						
4 times	50						
5 times	9						
6 times	16						
7 times	3						
8 times	1						

How many days per week do you and members of your household typically ride the bus?

0 times	37						
1 time	16						
2 times	17						
3 times	14						
4 times	22						
5 times	49						
6 times	28						
7 times	28						

Do you live in a household that makes more than \$25,000 per year?

Yes	30.00%	66					
No	70.00%	154					

Could you afford to ride the bus if the cost was \$2.50 per day or \$40 per month?

Yes	27.73%	61					
No	32.73%	72					
Possibly	39.55%	87					

Could you afford to ride if the cost was \$3.50 per day or \$50 per month?

Yes	13.64%	30					
No	67.27%	148					
Possibly	19.09%	42					

Is the cost of a bus pass a barrier to you doing the things you need/want to do in your community?								
Significantly	40.91%	90						
Sometimes	36.82%	81						
Never	22.27%	49						
If you are a bus rider, how do you buy your bus pass?								
Daily Pass	25.45%	56						
Monthly Pass	23.64%	52						
10-Ride Ticket Book	13.18%	29						
Other (please specify)	37.73%	83						
Most answers to this "Other" Option are either "I don't ride the bus" or they get their pass from an agency								
Are you:								
Male	30.45%	67						
Female	63.64%	140						
Prefer not to answer	5.91%	13						
Age Bracket: <input type="checkbox"/>								
5-18	2.28%	5						
19-34	32.88%	72						
35-49	29.68%	65						
50-64	28.77%	63						
65+	6.39%	14						

010 General Fund

Account Number

000.00 *** Title Not Found ***

Adj. Estimate

Revenues

YTD Revenues

Balance

% Rcvd

41010 Farebox Cash
41011 Ticket Vending Machine (TVM) Fares
41012 Farebox replacement
41015 Football fares
41019 GSC NSF payments and fees
41020 Monthly Passes
41022 Pass replacement
41025 LCC Term Pass
41026 Student Transit Pass
41034 Contract - 3 month
41035 Passes-3mo Flash
41038 Misc. Pass Sales
41039 Annual passes
41040 Day Passes
41041 Day Pass Ticket Books
41042 10-Ride Ticket Books
41050 Tokens
41060 Gift Certificates Sold
41110 Cash over/(short)
41111 Credit Card Discounts
41115 Pass refunds
41118 Gift Certificates Used
41119 On Account Clearing
41120 Consignment Discount
41121 Not for Profit Discount
41122 Donations/Promo
41210 Shipping & Handling Revenue
41510 Group Pass Earned Income
General Fund Total

2,008,284.00	1,429,639.60	1,429,639.60	578,644.40	71.19
257,500.00	314,860.88	314,860.88	(57,360.88)	122.28
78,000.00	3,149.60	3,149.60	74,850.40	4.04
82,500.00	98,970.71	98,970.71	(16,470.71)	119.96
-	-	-	-	-
2,032,410.00	2,175,773.00	2,175,773.00	(143,363.00)	107.05
-	(1,018.50)	(1,018.50)	1,018.50	-
-	-	-	-	-
-	-	-	-	-
390,000.00	313,290.00	313,290.00	76,710.00	80.33
35,000.00	22,890.00	22,890.00	12,110.00	65.40
-	-	-	-	-
108,000.00	144,736.12	144,736.12	(36,736.12)	134.01
16,500.00	18,997.85	18,997.85	(2,497.85)	115.14
-	1,211.00	1,211.00	(1,211.00)	-
370,800.00	356,270.25	356,270.25	14,529.75	96.08
-	-	-	-	-
-	465.00	465.00	(465.00)	-
-	326.80	326.80	(326.80)	-
(49,000.00)	(60,168.08)	(60,168.08)	11,168.08	122.79
(300.00)	(7,274.00)	(7,274.00)	6,974.00	2424.67
-	(2,261.00)	(2,261.00)	2,261.00	-
-	15,803.35	15,803.35	(15,803.35)	-
(22,700.00)	(27,768.15)	(27,768.15)	5,068.15	122.33
(200,000.00)	(240,457.50)	(240,457.50)	40,457.50	120.23
(5,400.00)	(6,417.00)	(6,417.00)	1,017.00	118.83
3,100.00	5,227.00	5,227.00	(2,127.00)	168.61
2,310,000.00	2,275,859.44	2,275,859.44	34,140.56	98.52
7,414,694.00	6,832,106.37	6,832,106.37	582,587.63	92.14
\$7,414,694.00	\$6,832,106.37	\$6,832,106.37	\$582,587.63	92.14