

LANE TRANSIT DISTRICT

REGULAR BOARD MEETING

January 17, 1984

7:30 p.m.

McNutt Room,  
Eugene City Hall

A G E N D A

I. CALL TO ORDER

II. ROLL CALL

Calvert\_\_\_\_\_ Eberly\_\_\_\_\_ Langton\_\_\_\_\_ Nelson\_\_\_\_\_  
Parducci\_\_\_\_\_ Randall\_\_\_\_\_ Brandt\_\_\_\_\_

III. INTRODUCTORY REMARKS BY BOARD PRESIDENT

IV. AUDIENCE PARTICIPATION

V. ITEMS FOR ACTION AT THIS MEETING

A. Approval of Minutes

B. Recommendation of Board Salary Subcommittee

VI. ITEMS FOR INFORMATION AT THIS MEETING

A. Current Activities

1. Role of Subcommittees and Board
2. Informational Presentation on Ridership  
- Fall 1983 Route Segment Analysis
3. Timeline for FY 84-85 Budget Process
4. Graphics Standards Development

Agenda  
January 17, 1984  
Page 2

B. Monthly Reporting

1. Financial
2. Ridership
3. Operations

VII. ITEMS FOR ACTION AT A FUTURE MEETING

- A. Budget Committee Nominations
- B. Public Contract Review Board
- C. Supplemental Budget

VIII. ADJOURNMENT

## AGENDA NOTES

Page No.

### V. ITEMS FOR ACTION AT THIS MEETING

- A. Approval of Minutes: Enclosed for Board approval are minutes of the December 27, 1983 adjourned meeting. 6
- B. Recommendation of Board Salary Subcommittee

Background: This item is on the agenda as a result of the completion of the performance review of the General Manager conducted in October, 1983. The Board Salary Subcommittee has met several times to discuss the General Manager's performance and salary, and will be making a salary recommendation to the full Board at the meeting.

### VI. ITEMS FOR INFORMATION AT THIS MEETING

- A. Current Activities
1. Role of Subcommittees and Board: At the December 27 adjourned Board meeting, a question about the role of Board subcommittees in relation to the full Board was raised. Included in the agenda packet is a memo from the General Manager on this issue, entitled "Conducting Board Business." The memo explains three basic models used by boards for conducting business and discusses their advantages and disadvantages. Staff will be happy to answer any questions regarding these processes at the meeting. 10
  2. Informational Presentation on Ridership: Included in the agenda packet is a memo which discusses LTD's ridership, including such issues as how it is measured and what variables affect it. To provide more background for the Board, the memo also defines key terms and explains historic trends and the Route Segment Analysis process. Stefano Viggiano, Planning Administrator, will be present at the meeting to give a brief presentation and answer any questions the Board may have. 12
  3. Timeline for FY 84-85 Budget Process: Included in the agenda packet are a staff memo and a copy of the timeline for the FY 84-85 budget process. Staff will begin the process by drafting new goals and objectives for Board approval. From those goals and objectives, division budgets are prepared. The Budget Committee is scheduled to be meeting to review the 23

proposed budget at the end of March. Please contact Mark Pangborn or Karen Rivenburg if you have any questions or concerns about the final timeline.

- |    |                                                                                                                                                                                                                                                                                                                                                                                       |    |
|----|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|
| 4. | <u>Graphics Standards Development:</u> As you will notice, staff memos in this agenda packet were prepared on the District's new letterhead, which will be phased in as the stock of old letterhead is depleted. Included in the agenda packet is a memo from Ed Bergeron explaining the implementation schedule for District supplies and equipment bearing the new graphics scheme. | 26 |
|----|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|

B. Monthly Reporting

1. Financial

- |    |                                                                                        |    |
|----|----------------------------------------------------------------------------------------|----|
| a. | Comparison of Budgeted and Actual Revenues and Expenditures                            |    |
|    | (1) General Fund                                                                       | 27 |
|    | (2) Capital Projects Fund                                                              | 28 |
|    | (3) Risk Management Fund                                                               | 29 |
| b. | Comparison of Year-to-Date Actual Revenues and Expenditures to Budgeted (General Fund) | 30 |

2. Ridership: Ridership reporting is now being done on a quarterly basis. The first quarterly report is included in this agenda packet. Staff will be present to answer any questions the Board might have.

- |    |                                    |    |
|----|------------------------------------|----|
| a. | 2nd Quarter Ridership Summary      | 31 |
| b. | Average Weekday Person Trips Graph | 32 |
| c. | Farebox Revenue Graph              | 32 |

- |    |                                                                                                                                                                                                                                          |    |
|----|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|
| 3. | <u>Operations:</u> Like Ridership figures, Operations reporting is now being done on a quarterly basis rather than monthly. The first quarterly report from the Operations Department is included in the agenda packet for Board review. | 33 |
|----|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|

VII. ITEMS FOR ACTION AT A FUTURE MEETING

- A. Budget Committee Nominations: Nominations to the Budget Committee will need to be made by Judy Nelson and Larry



Parducci for positions which expired on January 1, 1984. A third vacancy, for which it is Glenn (Pat) Randall's responsibility to make a nomination, already exists on the Budget Committee. Budget Committee deliberations on the FY 84-85 budget are scheduled to begin in March.

- B. Public Contract Review Board: As its October 18, 1983 meeting, the Board voted to direct staff to develop the relevant policies and procedures to establish a District Public Contract Review Board. An ordinance on this issue will be presented for Board review and approval at a later meeting.
- C. Supplemental Budget: A supplemental budget, reflecting the option for distribution of surplus revenues approved by the Board at its December meeting, will be presented for Board approval at a future meeting.

#### VIII. ADJOURNMENT

MINUTES OF DIRECTORS MEETING  
LANE TRANSIT DISTRICT

ADJOURNED MEETING

December 27, 1983

Pursuant to notice given at the December 20, 1983 regular meeting and distributed to persons on the mailing list of the District, an adjourned meeting of the Board of Directors of Lane Transit District was held on Tuesday, December 27, 1983 at 7:30 p.m. in the Eugene City Hall.

Present: Peter Brandt, Treasurer  
Janet Calvert, President, presiding  
Janice Eberly, Vice President  
Judy Nelson  
Glenn E. Randall  
Phyllis Loobey, General Manager  
Jo Sullivan, Recording Secretary

News Media Representatives:  
Tom Detzel, The Register-Guard  
John Selix, KUGN-Radio

Absent: Ted J. Langton  
Larry Parducci

INTRODUCTORY REMARKS BY BOARD PRESIDENT: After calling the meeting to order at 7:30 p.m. and calling roll, Ms. Calvert stated that she was glad to see everyone who was able to attend the meeting in spite of the icy road conditions. She remarked that during the past week the transit district had been fulfilling the needs of the community in this regard.

AUDIENCE PARTICIPATION: Ms. Calvert opened the meeting for public contact on items of general interest. She asked that anyone wishing to speak about particular agenda items wait until that point on the agenda. There was no one in the audience who wished to speak.

**MOTION**  
APPROVAL OF MINUTES: Mr. Randall moved that the minutes of the November 15, 1983 regular meeting and the December 20, 1983 regular meeting be approved as distributed. After seconding by Ms. Nelson, the motion carried unanimously.

**VOTE**  
BUDGET COMMITTEE RECOMMENDATION FOR DISPOSITION OF ADDITIONAL REVENUES: Ms. Calvert stated that the Board members had received their agenda notes and materials on this issue. Ms. Loobey commented on an issue that was raised after the Budget Committee deliberations, that of lowering the fares in addition to the other recommendations in Option 1. She called attention to her memo to the Board in the December 20 agenda packet, and stated that, should the Board be questioned about the issue, staff wanted them to be aware that it was discussed internally and for the reasons listed in the memo, it was not raised through the subcommittee process to the Budget Committee and Board.



## MOTION

Mr. Brandt moved that the Board approve the Budget Committee recommendation for disposition of funds detailed on pages 14 and 15 of the December 20 agenda packet. Mr. Randall seconded the motion.

Ms. Eberly stated that she had given this issue serious thought since the November Budget Committee meeting, and said she would like to recommend that the amount of the productivity bonus be lowered to \$200 for full-time employees and \$75.00 for part-time, with the remainder being put aside in the same kind of categories but with goals to be met, to be available for rewards or incentive programs. She felt the District was in need of a stricter incentive program, and said she was somewhat uncomfortable with the way the issue had been presented without some guidelines and a stricter incentive program for the future.

MOTION  
TO  
AMEND

Ms. Eberly then moved to amend the amount of money for productivity bonuses in the main motion from \$300 to \$200 for full-time employees and from \$100 to \$75 for part-time employees, with the remainder put aside for an incentive plan to be structured by the Board. Ms. Nelson seconded the motion.

Ms. Nelson stated that her rationalization for the second was somewhat the same as Ms. Eberly's. She had concerns about the lack of structure in the employee incentive rewards in Option 1, and some concerns with the employee incentive rewards in public agencies such as the District.

Mr. Randall agreed with the idea of a structured incentive reward system, but felt it should be set up for the future. He thought the employees, due to the write-up in the paper, knew they were going to get the \$300 and it was his opinion that the direction should not be changed in mid-stream. He thought it would be good to structure an incentive program for the future, but not to take the money the Budget Committee had appropriated to do so.

VOTE ON  
AMENDMENT With no further discussion, the vote was taken on the amendment to the main motion. The amendment failed three to two, with Ms. Eberly and Ms. Nelson voting in favor, and Mr. Brandt, Ms. Calvert, and Mr. Randall voting in opposition.

Ms. Nelson then stated that, for the record, she had had several concerns about Option 1 all along, which she voiced at a prior meeting. Specific to the fact that Option 1 was chosen, she voiced concerns about money for the employee productivity bonus being money raised through state and federal funding, as well as the payroll tax. She said that working through the change in the budget had been a productive learning experience for her, and she had a lot of hindsight about the expectations of employees concerning the productivity bonus as a result of the media involvement. She said she was not faulting the media, that the issue was well laid out, but the expectation was that employees, for all practical purposes, saw this money as being already available to them. She suggested that in the future, in dealing with funding alterations, when the opportunity is awarded to the staff to go back and look at funding sources, particularly when there is additional funding, that the Board have an opportunity to have information presented to them by the Budget Subcommittee before there is



so much staff or media involvement. She said she thought the Board was well represented on the Subcommittee, but that the four options which were presented all included the same revenue sources, and no other options had been available for discussion.

Ms. Calvert commented that the purpose of a subcommittee is to winnow out options that do not seem feasible and to discuss and work out things that are not likely to be voted on, and that there would be no point in having a subcommittee if all the work were done at the full Board level.

Ms. Nelson said that perhaps something to consider when sums of money at this level are involved would be to have another opportunity for discussion by the full Board.

Ms. Eberly stated that she understood what Ms. Nelson was saying and that she would like to add a couple of notes about the process and how it worked itself out. She said she had served on the Budget Subcommittee and had discussed all the options, but that the actual Budget Committee meeting had created additional questions for her and had given her reason to take a more reflective attitude about the entire package. She stated that she was very supportive of much of Option 1, but personally uncomfortable with the amount of money for the productivity bonus. She added that this had no bearing on her feeling for the performance of the staff and management at LTD; that she found more and more reasons all the time to sing their praises.

VOTE ON  
MAIN  
MOTION With no further discussion, the vote was taken on the main motion. The motion carried four to one, with Mr. Brandt, Ms. Calvert, Ms. Nelson, and Mr. Randall voting in favor and Ms. Eberly against.

Ms. Calvert stated that she felt the Board had learned a lot from this process. She thought it had been a useful process and said she found it refreshing that the Board members had been able to discuss how they disagree and yet be friendly and open and accepting of each others' points of view.

ORDINANCE NO. 25: Ms. Calvert opened this issue by stating that its purpose was to change the amount of the employer's excise tax from six-tenths of one percent (.006) to five-tenths of one percent (.005) for part of the fiscal year. She noted that if the ordinance was to be put into effect immediately, it would have to be approved as an emergency ordinance by unanimous vote.

Ms. Eberly asked what the time period would be if it were not passed as an emergency ordinance. Ms. Calvert replied that the ordinance would have to be read at two regularly scheduled Board meetings and would not affect the payroll tax until April.

MOTION  
VOTE Mr. Randall moved that Ordinance No. 25 be read by title only. Mr. Brandt seconded, and the motion carried by unanimous vote. There were enough copies of the ordinance for all who were present to see a copy.

Ms. Calvert then read Ordinance No. 25 by title only: "Ordinance No. 25, An Ordinance Imposing an Excise Tax on Employers, Providing for Administration, Enforcement, and Collection of the Tax, Terminating the Application of Amended Ordinance No. 20, and Declaring an Emergency."

**MOTION**

Mr. Randall then moved that the Board adopt Ordinance No. 25 as presented on pages 17-37 of the agenda packet. Mr. Brandt seconded the motion.

Mr. Brandt asked if the dates on the ordinance were correct and what would be the difference between using the last six months of the fiscal year as opposed to the middle six months. Mr. Pangborn replied that if the ordinance passed, staff would notify the Oregon Department of Revenue the next day, and they would notify District taxpayers that taxes paid for payroll from October, November, and December of 1983 would be paid at the lower rate. This would insure that the money would be received during this fiscal year. He stated that staff had not computed revenues and expenses for the next fiscal year, and the Board and Budget Committee would be able to decide later what they wanted to do with the payroll tax rate for FY 84-85.

**VOTE**

The vote was then taken on Ordinance No. 25. The motion carried by unanimous vote.

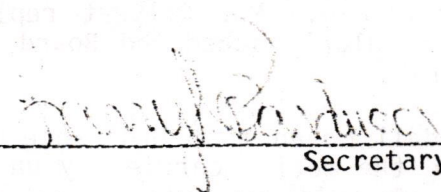
**MOTION**

Mr. Randall moved, seconded by Ms. Nelson, that the meeting be adjourned. Ms. Nelson commented that the Board members had all received their informational materials for the Board meeting, and since all the action items had been taken care of and since driving was hazardous that evening, she would prefer to adjourn rather than discussing the information items.

Ms. Eberly mentioned that she had called the schedule information telephone number during the icy road conditions, and that she had been told exactly how to get to the bus and was reminded that it was a ten-cent fare day. She wanted to commend the staff for their helpfulness in providing information during those weather conditions.

**VOTE**

With no further discussion, the meeting was adjourned at 7:56 p.m. by unanimous vote.

  
Secretary



## CONDUCTING BOARD BUSINESS

At the December, 1983 Board meeting, the discussions surrounding the Budget Committee recommendation highlighted the need for the Board to discuss how they want to go about conducting their business. There are three basic models that boards utilize for conducting business. Each model has its own strengths and weaknesses depending on what the board is trying to accomplish. It is not uncommon for a particular board to use all three of the models at different times in the decision-making process. Moreover, there are endless variations on these models, depending upon circumstances.

By discussing these different decision models, it is my hope that the LTD Board will develop a clearer consensus on how they wish to make decisions.

- I. Staff Recommendations - This model consists primarily of staff developing a complete recommendation for board approval. There can be discussion on the part of the board concerning the recommendation. This model is most often used for highly technical or routine matters that require board action. In most cases, because of the matter under discussion, the Board defers to the staff on the recommendations.

Advantages - A. Reduces board time commitments; B. Acknowledges the obvious, that in some cases the staff is in the best position to make the right decisions.

Disadvantages - A. Board not as well educated on issue and they find it difficult to disagree with staff. Board feels like they are rubber stamping recommendations; B. Boards may make decisions contrary to wishes because they don't fully understand the issue.

- II. "Committee of the Whole" - Under this model, the entire board functions as a sub-committee. That is, they have work sessions where one or more issues are discussed at length. This model is usually used for background briefings on complex issues requiring considerable study. State law requires that all of these types of meetings are open to the general public.

Advantages - A. All board members are equally involved in becoming educated on a subject as well as developing proposals. There is ample opportunity to ask questions, make comments and have your concerns addressed; B. Since the meetings are open to the public, public concern or opposition can be spotted early on and addressed.

Disadvantages - A. The meetings must be open to the public and candid discussion is sometimes limited. This in turn leads to the situation where good ideas are not raised for fear of public reaction; B. This can be a very time-consuming process if everybody wants to ask questions and have "their say". In addition, public meetings require public notice and adequate meeting space as well as coordinating the schedules of seven people which makes it all the more difficult to arrange meetings.

III. Sub-Committees of the Board - Under this model a sub-committee of the board is established to address certain board issues. Sub-committees are usually made up of less than a majority of the board (3 board members) so that meetings are not public. A sub-committee usually examines in detail one issue and makes a recommendation on a course of action to the full board. This is a common model in that it offers substantial board interaction with staff to answer questions, develop proposals, etc. without requiring participation of all the board members.

Advantages - A. Limits time commitment of board members while allowing for maximum use of expertise and interest of individual board members; B. Allows open discussions without worry of public reaction; C. Allows for involvement and education for some of the Board members.

Disadvantages - A. Allows for only three board members to be educated and requires that the rest of the board rely on their judgment and recommendations; B. This model does require more time commitment than Model I - Staff Recommendation but less than Model II - "Committee of the Whole".

Historically, the Board has used all three methods of conducting business depending upon the issue under discussion.

Most often, the Board has used the Committee of the Whole Model for work sessions apart from regular Board meetings. Two examples were labor negotiations (conducted in Executive Session) and during the progress of the Comprehensive Service Redesign. Board subcommittees have been established for Goals and Objectives, Administrative Salaries and Benefits and Site Study, for example. The Staff Recommendation Model is used primarily to conduct routine, on-going business.

All three of these models have worked advantageously for the District through time. It is important for Board members to understand each of these methods, their process and advantages and disadvantages.

*Phyllis / jo*  
Phyllis Loobey  
General Manager

PL/em





## **Lane Transit District**

P.O. Box 2710 Eugene, Oregon 97402 Telephone: (503) 687-5581

January 17, 1984

TO: Board of Directors  
FROM: Planning Administrator  
RE: Ridership Information

This brief report is intended to provide the Board with information on LTD's ridership; how it is measured, what variables affect it, and historic and recent productivity trends. The report is very general, providing only an overview of the information. A presentation will be made at the Board meeting to highlight some of the key issues and trends and to answer any questions that you may have.

### I. DEFINITION OF KEY TERMS

Trip - A trip is counted every time a person is transported from his/her origin to his/her destination on an LTD bus. A trip may require boarding more than one bus (if the person was required to transfer to reach that destination).

Ride - A ride is counted every time a person boards an LTD bus regardless of whether the bus was the first or second leg of a one-way trip. For example, a patron boarding at the River Road Transit Station, riding into town, and transferring to another bus to get to Lane Community College would account for two rides (but only one trip).

Vehicle Hour - Every hour that a bus is in service is counted as a vehicle hour. For example, three buses in service for ten hours would account for 30 vehicle hours.

Productivity - Productivity is measured as ridership (either trips or rides) per unit of service (generally vehicle hours). Productivity gives an indication of ridership corrected by the service level. Therefore, if a doubling of service resulted in a doubling of ridership, the productivity would not have been changed.

### II. HISTORIC TRENDS IN RIDERSHIP

LTD's ridership has been shown to be sensitive to the amount of service that is provided, the fare that is charged, gasoline price and availability, the local economy, and school enrollment. Other factors, such as street congestion and parking costs, are known to affect transit ridership, although there has not been enough variation in these variables to be able to discern any impact on our ridership.



Graph 1 shows the District's average weekday ridership from its inception in 1972 to the present. During the 1970s, the District's ridership increased approximately fivefold. This increase is largely attributed to proportional increases in the amount of service provided and was helped by increasing gasoline prices, problems in the availability of gasoline, a growing local economy and population, and a relatively low bus fare. Reversals in these trends caused a decline in ridership during the early 1980s. During fiscal year 1983-84, however, ridership has increased by 11%, perhaps indicating the start of a new growth period for the District.

Graph 2 shows the District productivity from January, 1979 to the present. Although this graph has similar variations as the ridership graph, the smaller fluctuations provide further evidence that ridership increases and decreases are primarily attributed to changes in the level of service. The graph also shows that the current productivity of the system is nearly as high as it was on a comparable month during the peak ridership period of the 1979-80 gas crisis.

### III. FALL, 1983 ROUTE SEGMENT ANALYSIS

As mentioned, total ridership during fiscal year 1983-84 has increased by approximately 11% when compared to the same period of the previous year. In order to obtain more specific ridership information, the District conducts quarterly Route Segment Analyses (RSAs). RSAs provide a mechanism whereby we can collect ridership information for each trip on each route on one selected weekday, Saturday and Sunday. The information can also be combined to provide information on total productivity for each route on the system and for any time period of the day. Each RSA can be thought of as a "snapshot" view of ridership. RSAs are necessary to monitor the performance of each route, to discern trends in ridership and productivity, and to compare the current route performance to previous RSAs.

The Fall, 1983 RSA was conducted on Saturday, October 29; Sunday, October 30; and Wednesday, November 2. The results from this RSA tell us a great deal about the recent ridership gains. It appears that the service that has been added to the system has resulted in significant productivity gains while recent service reductions had no appreciable impact on ridership. In addition, it seems that some of the routes which have either been added recently or were somewhat more innovative have matured and show high ridership increases.

Tables 1 through 5 show the data on which the following analysis is based.

#### A. Service Additions

Although the District has generally been in a service reduction mode during the last few years, service has been added to two routes; the frequency of midday service on the #41 Barger route was increased from 60 to 30 minutes and additional trips were added to the #19 Main Street route. In both cases this addition of



service resulted in a proportionally greater increase in ridership, meaning that the productivity of the service actually increased. This implies that by improving the level of service, many new riders can be attracted to the system.

#### B. Service Reductions

In June, 1983, service reductions were implemented by eliminating one Saturday route, three Sunday routes, and the last two hours of Saturday evening service. These service reductions were not the result of financial constraints, but rather were recommended in order to improve the efficiency of the system by eliminating service which either provided unnecessary duplication or was unproductive. The recent RSA indicates that the service reductions were very successful: overall productivity on Saturday and Sunday increased by 16% and 20% respectively. In fact, it seems that there was almost no loss in ridership resulting from the service reductions. For example, Saturday evening service was reduced by 37% by eliminating the final two trips on all routes. This service reduction, however, only resulted in a 5% decrease in ridership, yielding a 50% increase in productivity during that time period.

#### C. Maturing Routes

The Fall, 1983 RSA also indicates that some of the routes which have been added during the last two years are maturing and showing large ridership increases. Both the #52 Irving and #55 Riviera Express were added in September, 1982. While these routes did not produce high ridership levels soon after they were implemented, the recent RSA shows that they both have increasing productivity trends. The productivity of the #52 increased by 93% and the #55 increased by 50% when compared to Fall, 1982 figures. This implies that the routes are maturing and becoming more attractive as they establish themselves.

The recent RSA also shows that the #10A, 10B and 14 routes which circulate within Springfield have had large productivity gains. These routes were implemented in September, 1981 as part of the Comprehensive Service Redesign. They are somewhat innovative within our system in that they do not tie into the Eugene Mall but instead use the Springfield City Center Station as an origin point. They have generally had poor ridership which has been attributed to this lack of direct service to downtown Eugene. The recent productivity increases show that patrons have begun to understand these neighborhood routes and are using them. Due to the innovative nature of these routes, the maturing process appears to have taken longer than with other more traditional service.

#### D. Substandard Service

The RSA can also be used to identify substandard service. A route is considered substandard if its productivity is less than 50% of the systemwide average productivity. Through service reductions during the last three years, the District has managed to eliminate much of the substandard service. The RSA shows that

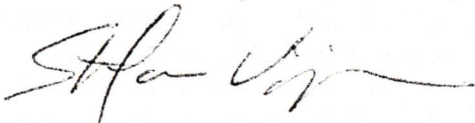


only two routes on weekdays, two routes on Saturday, and no routes on Sunday fail to meet standards. Of these four routes, three have been implemented within the last year and are therefore still establishing themselves, and the fourth was rated as substandard despite a 122% productivity gain.

#### IV. BUS RIDER SURVEYS

The District also gathers specific information on riders throughout the system by conducting periodic Bus Rider Surveys. These surveys are used to determine both the travel behavior of bus riders and their opinions of the system and suggestions for improvements to the service. For instance, the surveys can determine origins and destinations of trips, trip purpose, ridership frequency, fare payment used, bus information products used, and desired service changes.

The most recent Bus Rider Survey was conducted in May, 1982. Data collected from that survey is on a computer file and is used very often by the District in making decisions about service additions, deletions, and modifications, fare issues, and marketing programs. The next Bus Rider Survey is scheduled to be conducted in May, 1985.

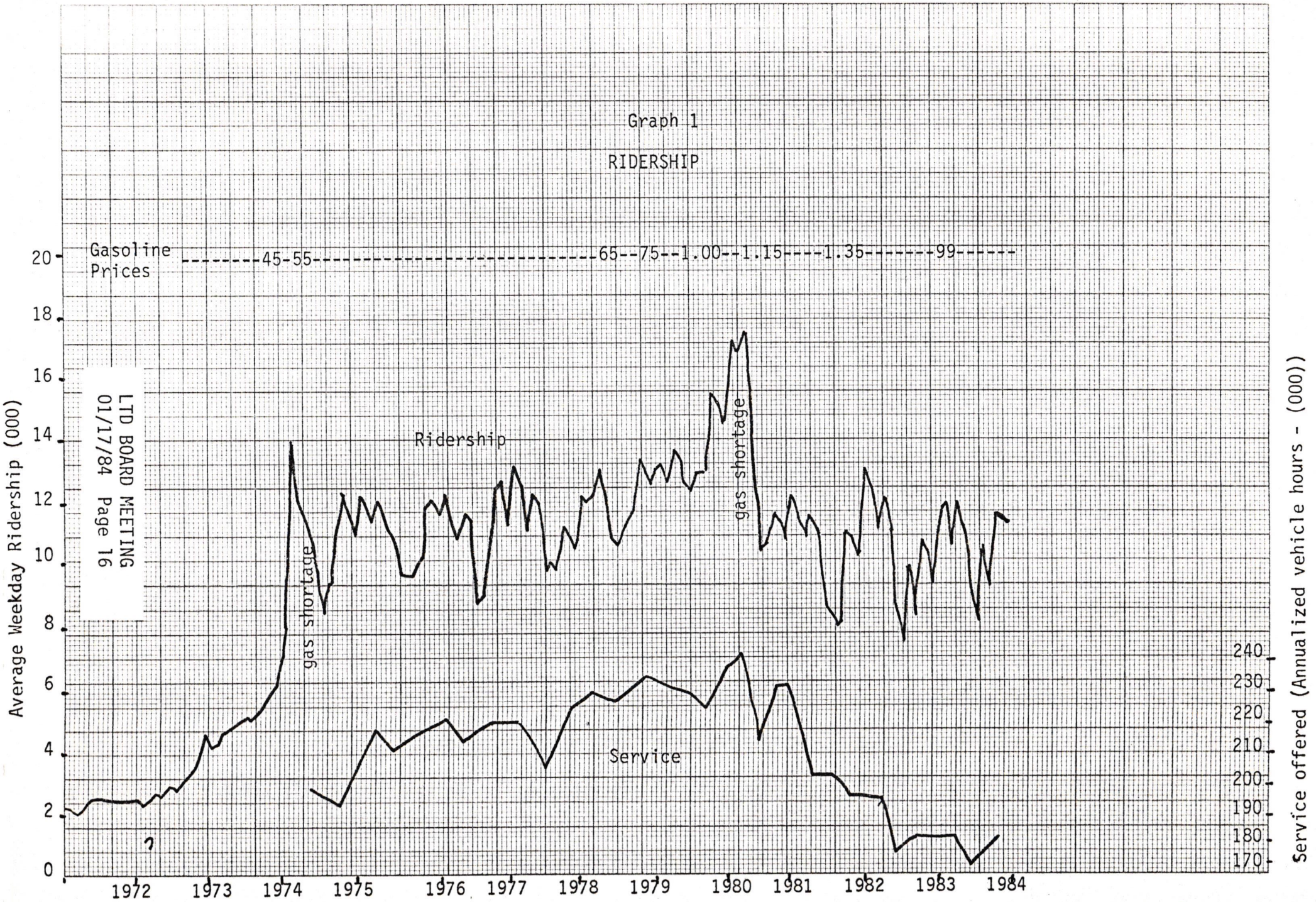


Stefano Viggiano  
Planning Administrator

SV:ms

attachments







Graph 2  
RIDER PRODUCTIVITY

Productivity (Average person trips per week/ Average schedule hours per week)

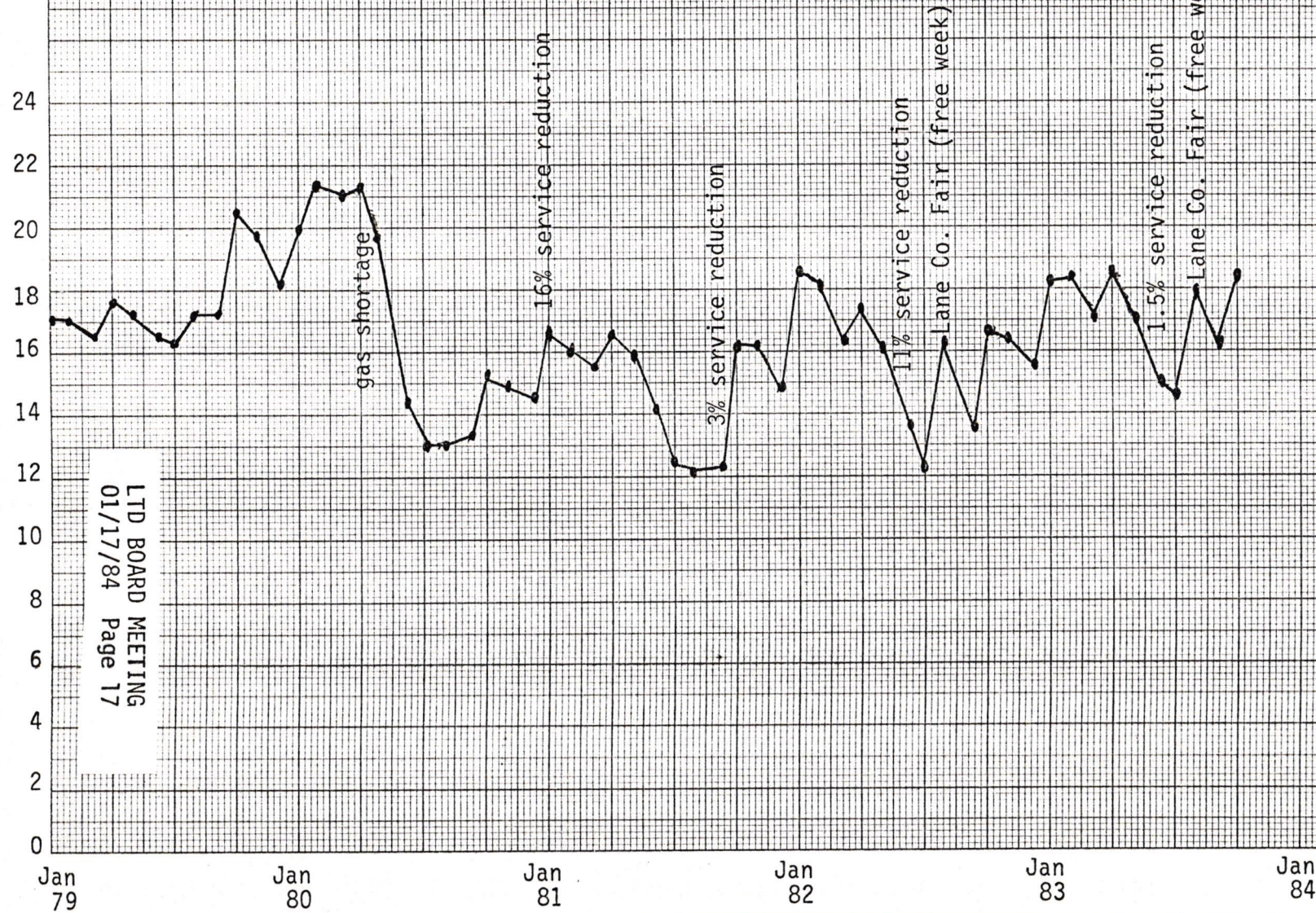




TABLE 1

WEEKDAY PRODUCTIVITY BY ROUTE (URBAN)  
COMPARISON OF FALL 1983 TO FALL 1982

ROUTE	FALL '83	FALL '82	%CHANGE
#20/22 30TH AVE. SHUTTLE/LCC EXPRESS	38.5	39.9	- 3.5
#11 THURSTON	38.1	39.5	- 3.5
#31B CITY VIEW/U OF O	36.1	31.1	+ 15.3
#51 SANTA CLARA	35.2	26.1	+ 35.0
#31A BAILEY HILL/U OF O	35.2	35.5	- .8
#27 FAIRMOUNT	33.1	29.6	+ 12.0
#29 U OF O	32.3	38.9	- 17.0
#19 MAIN STREET/54TH	31.8	28.5	+ 11.5
#25 AMAZON	30.8	27.8	+ 11.0
#21 LCC HARRIS	30.7	36.1	- 15.0
#41 BARGER	30.2	27.4	+ 10.0
#23 FOX HOLLOW	29.9	30.9	- 3.0
#33 JEFFERSON	29.8	20.2	+ 47.5
#30 BERTELSEN	29.5	29.1	+ 1.0
#10B MOHAWK/YOLANDA	25.2	17.2	+ 46.5
#62 5TH STREET MARKET	24.5	13.3	+ 84.0
#60 VRC/CAL YOUNG	23.8	27.6	- 14.0
#61 OAKWAY	22.6	19.4	+ 16.5
#10A MOHAWK/Q STREET	22.6	25.2	- 10.3
#40 ROYAL	21.5	18.5	+ 16.2
#15 LCC/ ASHLANE	21.4	21.2	+ 1.0
#13 CENTENNIAL	21.4	22.7	- 5.7
#15A LCC/SPFLD. CITY CENTER	21.1	16.3	+ 29.5
#12 HARLOW	20.8	23.2	- 10.3
#64 VRC/K-MART	18.6	14.4	+ 29.2
#52 IRVING	18.3	9.5	+ 92.6
#55 RIVIERA EXPRESS	18.0	12.0	+ 50.0
#44 ECHO HOLLOW	17.3	17.9	- 3.4
#50 PARK	16.9	16.3	+ 3.7
#14 FAIRVIEW	16.3	8.5	+ 92.0
#32 WEST 11TH	15.6	N.A	-
#35 WESTSIDE	11.8	N.A	-
#65 COUNTRY CLUB	5.0	N.A	-
TOTAL DAY	27.7	26.6	+ 4.1

TABLE 2

SATURDAY PRODUCTIVITY BY ROUTE  
COMPARISON OF FALL '83 TO FALL '82

ROUTE	FALL '83	FALL '82	%CHANGE
#64 VRC/K-MART	71.2	58.8	+ 21.1
#25 AMAZON	36.7	26.8	+ 27.0
#30 BERTELSEN	35.9	30.7	+ 17.0
#60 VRC/CAL YOUNG	34.5	43.4	- 20.5
#11 THURSTON	32.8	36.4	- 10.0
#51 SANTA CLARA	31.2	24.0	+ 30.0
#31B CITY VIEW/U OF O	30.6	17.1	+ 79.0
#23 FOX HOLLOW	28.9	26.8	+ 8.0
#41 BARGER	26.7	23.0	+ 16.1
#62 5TH STREET MARKET	24.8	13.5	+ 83.7
#10A MOHAWK/Q STREET	22.0	11.6	+ 89.7
#13 CENTENNIAL	20.1	20.3	- 1.0
#12 HARLOW	19.3	20.0	- 3.5
#27 FAIRMOUNT	17.8	14.9	+ 19.5
#40 ROYAL	17.7	14.1	+ 25.5
#44 ECHO HOLLOW	15.8	11.6	+ 36.2
#54 VRC SPECIAL	15.6	N.A.	-
#61 OAKWAY	15.2	15.8	- 3.8
#33 JEFFERSON	13.9	19.7	- 29.4
#50 PARK	13.6	9.9	+ 37.4
#17 VRC SPECIAL	12.7	N.A.	-
#14 FAIRVIEW	7.1	3.2	+122.0
TOTAL DAY	25.7	22.1	+ 16.3



TABLE 3

SUNDAY PRODUCTIVITY BY ROUTE  
COMPARISON OF FALL '83 TO FALL '82

ROUTE	FALL '83	FALL '82	%CHANGE
#64 VRC/K-MART	58.3	31.3	+ 86.3
#60 VRC/CAL YOUNG	26.9	28.0	- 4.0
#30 BERTELSEN	24.3	18.1	+ 34.3
#51 SANTA CLARA	22.1	18.2	+ 21.4
#41 BARGER	20.2	18.0	+ 12.2
#11 THURSTON	19.7	20.0	- 1.5
#23 FOX HOLLOW	17.3	18.7	- 7.5
#25 AMAZON	15.3	14.7	+ 4.1
#10A MOHAWK/Q STREET	14.9	9.8	+ 52.0
#14 FAIRVIEW	13.0	5.7	+128.1
#62 5TH STREET MARKET	13.0	5.6	+132.1
#31B CITH VIEW/ U OF O	12.0	10.8	+ 11.1
#12 HARLOW	11.4	14.6	- 22.0
#13 CENTENNIAL	11.2	11.5	- 2.6
#40 ROYAL	10.4	8.6	+ 21.0
TOTAL DAY	18.1	15.1	+ 20.0

TABLE 4

URBAN PRODUCTIVITY BY TIME OF DAY  
COMPARISON OF FALL '83 TO FALL '82

SERVICE	FALL '83	FALL '82	%CHANGE
<u>WEEKDAY</u>			
AM PEAK	28.0	26.1	+ 7.3
MIDDAY	31.1	29.2	+ 6.5
PM PEAK	30.2	29.3	+ 3.1
EVENING	13.5	13.5	-
TOTAL DAY	27.7	26.6	+ 4.1
<u>SATURDAY</u>			
AM PEAK	13.1	11.8	+ 11.0
MIDDAY	30.3	28.3	+ 7.1
PM PEAK	29.9	28.7	+ 4.2
EVENING	17.4	11.6	+ 50.0
TOTAL DAY	25.7	22.1	+ 16.3
<u>SUNDAY</u>			
TOTAL DAY	18.1	15.1	+ 20.0

TABLE 5

NON-URBAN PRODUCTIVITY BY ROUTE  
COMPARISON OF FALL '83 TO FALL '82

ROUTE	FALL '83	FALL '82	%CHANGE
#34 VENETA	15.7	13.2	+ 19.0
#53 JUNCTION CITY	10.7	18.3	- 41.5
#26 LCC/LOWELL	8.5	11.1	- 23.4
#16 MCKENZIE BRIDGE	5.9	5.3	+ 11.3
#63 COBURG	5.5	4.7*	+ 14.6
TOTAL DAY	9.3	10.5	- 11.4

\*Fall '82 productivity has been adjusted to exclude riders who utilized this service for an urban destination.



**Lane Transit District**

P.O. Box 2710 Eugene, Oregon 97402 Telephone: (503) 687-5581

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M E M O R A N D U M

January 17, 1984

TO: Board of Directors

FROM: Accountant

RE: 1984-85 Budget Timeline

A copy of the District's 1984-85 Budget Timeline is attached for your review. The process is basically the same as that followed by the Board of Directors and the Budget Committee last spring with the exception that the salary and benefit package will be approved in January rather than in March.

The timeline is a draft only so if you have any conflicts or suggestions for more convenient meetings, please bring them up as soon as possible.

Thank you.

*Karen R. Rivenburg*

Karen R. Rivenburg  
Accountant

KRB/ms

LANE TRANSIT DISTRICT  
BUDGET AND TDP TIMELINE  
FISCAL YEAR 84-85

DATE	DESCRIPTION
1/84	Board of Directors to begin to fill vacant budget committee positions
1/84	Division meetings regarding 84-85 budget
1/13	Revenue forecast - 1st draft
1/20	Action plan instructions to divisions, including forms
1/25	Draft organization goals published by Executive Committee
2/3	Divisions submit 3 year goals and 1 year action plans
2/8	Executive committee review and resolve any goal/action plan conflicts
2/14	Board subcommittee review and approve organization goals and action plans (if this step desired by Board)
2/17	Revenue forecast - 2nd draft
2/21	Board review and approve organization goals and action plans Board approve salary and benefit package for 84-85
2/22	Publish (internally) organization goals and action plans Budget instructions to divisions, including expenditure guidelines and chart of account descriptions
2/24	TDP-Outline
3/2	Divisions submit budget requests and 3 year capital plans to Department Heads
3/5	Revenue forecast - final
3/6	Budget requests submitted to Accountant
3/9	Budget draft - 1st draft by Accountant
3/12 - 3/30	Staff Budget Committee adjusts drafted budget
3/15	Publish notice of Budget Committee meeting and public hearing



3/27 Budget Committee - 1st meeting - Budget message and public hearing

3/30 Draft budget completed by Budget Officer

4/4 Executive Committee approve draft budget

4/6 Deliver draft budget to Budget Committee members

4/10 Budget Committee meeting - revenue forecast

4/11 TDP - 2nd draft - approved by Executive Committee

4/17 Board of Directors meeting (review draft TDP if there is no subcommittee which will review it)

4/24 Board Budget subcommittee reviews draft TDP (if desired by Board of Directors)

Budget Committee meeting - Administration, Marketing and Planning, Transportation

5/4 TDP - final draft

5/8 Budget Committee meeting - Maintenance, Capital Projects, Risk Management

5/9 Executive Committee approve draft TDP

5/11 TDP - final typed TDP

5/15 Board of Directors approve TDP

5/22 Budget Committee meeting - approve budget

5/31 Publish 1st notice of Budget adoption

6/7 Publish 2nd notice of Budget adoption

6/19 Board of Directors adopt budget, make appropriations

7/1 Submit adopted budget to State of Oregon

**Lane Transit District**

P.O. Box 2710 Eugene, Oregon 97402 Telephone: (503) 687-5581

January 17, 1984

TO: Board of Directors  
FROM: Ed Bergeron, Marketing Administrator  
RE: Graphics Standards Development

During the past year, staff have been working with Rubick and Funk Graphic Communications to develop and implement a consistent, positive graphic identity program for the District. Certain elements of the project are complete, and a small-scale transition to the new look has already begun. A complete phase-in is expected to take several years in conjunction with our regular schedule of equipment and facilities renovation.

In the weeks ahead, replacement orders for letterhead, envelopes, uniform patches and business forms will introduce the new graphics. Printed marketing materials and advertising will change over early next year, while the equipment transition will begin with the arrival of the 800-series buses in late 1984.

Ed Bergeron  
Marketing Administrator

EB/em

LANE TRANSIT DISTRICT  
COMPARISON OF BUDGETED AND ACTUAL REVENUES AND EXPENDITURES  
GENERAL FUND  
FOR THE SIX MONTHS ENDING DECEMBER 31, 1983 (50.00% YEAR COMPLETED)

	CURRENT MONTH		YEAR-TO-DATE		%	YEARLY	BALANCE
	1983	1982	1983	1982	EXPENDED	BUDGET	
REVENUES							
Operating Revenues:							
Passenger Fares	\$ 120,827	\$ 108,143	\$ 616,076	\$ 562,495	60.08%	\$1,025,400	\$ (409,324)
Charters	235	---	20,678	17,865	57.44	36,000	(15,322)
Advertising	3,870	3,655	21,560	22,056	46.47	46,400	(24,840)
Miscellaneous	171	4,276	1,429	4,737	14.29	10,000	(8,571)
TOTAL OPERATING REVENUES	125,103	116,074	659,743	607,153	59.02	1,117,800	(458,057)
Non-Operating Revenues:							
Interest	14,514	6,353	58,368	51,519	116.74	50,000	8,368
Payroll Taxes	10,000	---	2,549,978	2,304,273	55.75	4,574,000	(2,024,022)
Federal Operating Assistance	---	---	---	---	N/A	650,000	(650,000)
ORE In-Lieu-Of Payroll Taxes	112,885	89,991	196,838	168,397	98.42	200,000	(3,162)
Other Operating Assistance	---	---	2,545	---	N/A	---	2,545
TOTAL NON-OPERATING REVENUES	137,399	96,344	2,807,729	2,524,189	51.29	5,474,000	(2,666,271)
TOTAL REVENUES	262,502	212,418	3,467,472	3,131,342	52.60	6,591,800	(3,124,328)
EXPENDITURES							
Administration:							
Personal Services	33,075	33,107	181,450	170,690	47.25	384,000	202,550
Materials and Supplies	8,133	3,104	48,332	33,399	49.42	97,800	49,468
Contractual Services	1,913	651	20,396	42,320	41.12	49,600	29,204
TOTAL ADMINISTRATION	43,121	36,862	250,178	246,409	47.08	531,400	281,222
Marketing & Planning:							
Personal Services	35,572	28,393	174,945	173,835	49.21	355,500	180,555
Materials and Supplies	6,429	26,093	72,289	51,379	65.54	110,300	38,011
Contractual Services	22,063	41,862	147,390	127,969	49.18	260,200	112,810
TOTAL MARKETING & PLANNING	64,064	96,348	394,624	353,183	54.36	726,000	331,376
Transportation:							
Personal Services	309,938	271,598	1,616,998	1,560,005	49.47	3,268,900	1,651,902
Materials and Supplies	(5,218)	864	2,120	4,022	10.39	20,400	18,280
TOTAL TRANSPORTATION	304,720	272,462	1,619,118	1,564,027	49.22	3,289,300	1,670,182
Maintenance:							
Personal Services	85,991	79,391	465,350	442,989	51.41	905,100	439,750
Materials and Supplies	74,165	83,481	383,722	449,799	39.55	970,200	586,478
Contractual Services	4,498	6,399	23,249	28,540	21.93	106,000	82,751
TOTAL MAINTENANCE	164,654	169,271	872,321	921,328	44.03	1,981,300	1,108,979
Contingency	---	---	---	---	N/A	63,800	63,800
Transfer to Capital Projects	---	---	---	186,400	N/A	---	---
Transfer to Risk Management	---	---	---	143,900	N/A	---	---
TOTAL EXPENDITURES	576,559	574,943	3,136,241	3,415,247	47.58	6,591,800	3,455,559
EXCESS (DEFICIT) OF REVENUES OVER EXPENDITURES	\$ (314,057)	\$ (362,525)	\$ 331,231	\$ (283,905)	N/A	\$ ---	\$ 331,231



LANE TRANSIT DISTRICT  
COMPARISON OF BUDGETED AND ACTUAL REVENUES AND EXPENDITURES  
CAPITAL PROJECTS FUND  
FOR THE SIX MONTHS ENDING DECEMBER 31, 1983 (50.00% YEAR COMPLETED)

	YEAR-TO DATE	% EXPENDED	YEARLY BUDGET	BALANCE
<b>RESOURCES</b>				
BEGINNING FUND BALANCE	\$1,332,122	118.18%	\$1,127,207	\$ 204,915
<b>Revenues:</b>				
UMTA Section 3	—	N/A	2,144,203	(2,144,203)
UMTA Section 5	71,109	7.66	928,370	(857,261)
UMTA Section 9A	1,875	.48	393,000	(391,125)
UMTA Section 18	18,805	84.86	22,160	(3,355)
Federal Aid Urban	—	N/A	41,200	(41,200)
State Assistance	9,767	3.80	256,719	(246,952)
TOTAL REVENUES	101,556	2.68	3,785,652	(3,684,096)
TOTAL RESOURCES	1,433,678	29.18	4,912,859	(3,479,181)
<b>EXPENDITURES</b>				
<b>Locally Funded:</b>				
Land and Buildings	3,871	21.75	17,800	13,929
Bus Stop Improvements	7,510	29.45	25,500	17,990
Office Equipment	5,076	31.73	16,000	10,924
Computer Software	—	N/A	2,500	2,500
Maintenance Equipment	921	96.95	950	29
Miscellaneous	—	N/A	3,600	3,600
TOTAL LOCALLY FUNDED	17,378	26.19	66,350	48,972
<b>Federal Aid Urban Funded:</b>				
Bus Stop Improvements	—	N/A	77,000	77,000
TOTAL FAU FUNDED	—	N/A	77,000	77,000
<b>UMTA Funded:</b>				
Buses	—	N/A	3,856,000	3,856,000
Bus Related Equipment	73,271	24.42	300,000	226,729
Service Vehicles	9,797	50.24	19,500	9,703
Bus Stop Improvements	23,506	31.34	75,000	51,494
Office Equipment	6,803	11.13	61,150	54,347
Miscellaneous	—	N/A	166,000	166,000
Computer Software	1,359	2.00	68,000	66,641
TOTAL UMTA FUNDED	114,736	2.52	4,545,650	4,430,914
Contingency	—	N/A	223,859	223,859
TOTAL EXPENDITURES	132,114	2.69	4,912,859	4,780,745
ENDING FUND BALANCE	\$1,301,564	N/A	\$ —	\$1,301,564

LANE TRANSIT DISTRICT  
COMPARISON OF BUDGETED AND ACTUAL RESOURCES AND EXPENDITURES  
RISK MANAGEMENT FUND  
FOR THE SIX MONTHS ENDING DECEMBER 31, 1983 (50.00% YEAR COMPLETED)

	YEAR-TO- DATE	% EXPENDED	YEARLY BUDGET	BALANCE
<b>RESOURCES</b>				
BEGINNING FUND BALANCE	\$ 297,749	93.22%	\$ 319,400	\$ (21,651)
<b>Revenues:</b>				
Transfer From General Fund	---	N/A	---	---
Interest	10,912	218.24	5,000	5,912
TOTAL REVENUES	10,912	218.24	5,000	5,912
TOTAL RESOURCES	308,661	95.15	324,400	(15,739)
<b>EXPENDITURES</b>				
Administration	9,456	45.24	20,900	11,444
Worker's Compensation	27,700	26.63	104,000	76,300
Liability Program	85,809	43.98	195,100	109,291
Miscellaneous Insurance	1,547	35.16	4,400	2,853
TOTAL EXPENDITURES	124,512	38.38	324,400	199,888
ENDING FUND BALANCE	\$ 184,149	N/A	\$ ---	\$ 184,149



LANE TRANSIT DISTRICT  
COMPARISON OF YEAR-TO-DATE ACTUAL REVENUES AND EXPENDITURES TO BUDGETED  
GENERAL FUND  
FOR THE SIX MONTHS ENDING DECEMBER 31, 1983

	YEAR-TO-DATE ACTIVITY	YEAR-TO-DATE BUDGET	VARIANCE FAVORABLE (UNFAVORABLE) AMOUNT	%
<b>REVENUES</b>				
<b>Operating Revenues:</b>				
Passenger Fares	\$ 616,076	\$ 504,000	\$ 112,076	22.24%
Charters	20,678	21,000	(322)	(1.53)
Advertising	21,560	23,180	(1,620)	(6.99)
Miscellaneous	1,429	1,200	229	19.08
TOTAL OPERATING REVENUES	659,743	549,380	110,363	20.09
<b>Non-Operating Revenues:</b>				
Interest	58,368	24,800	33,568	135.35
Payroll Taxes	2,549,978	2,287,000	262,978	11.50
Federal Operating Assistance	---	---	---	N/A
Oregon In-Lieu-Of Payroll Taxes	196,838	100,000	96,838	96.84
Other Operating Assistance	2,545	---	2,545	N/A
TOTAL NON-OPERATING REVENUES	2,807,729	2,411,800	395,929	16.42
<b>TOTAL REVENUES</b>	<b>3,467,472</b>	<b>2,961,180</b>	<b>506,292</b>	<b>17.10</b>
<b>EXPENDITURES</b>				
<b>Administration:</b>				
Personal Services	181,450	189,512	8,062	4.25
Materials and Supplies	48,332	47,200	(1,132)	(2.40)
Contractual Services	20,396	21,550	1,154	5.35
TOTAL ADMINISTRATION	250,178	258,262	8,084	3.13
<b>Marketing &amp; Planning:</b>				
Personal Services	174,945	175,770	825	.47
Materials and Supplies	72,289	81,030	8,741	10.79
Contractual Services	147,390	167,650	20,260	12.08
TOTAL MARKETING & PLANNING	394,624	424,450	29,826	7.03
<b>Transportation:</b>				
Personal Services	1,616,998	1,634,050	17,052	1.04
Materials and Supplies	2,120	6,830	4,710	68.96
TOTAL TRANSPORTATION	1,619,118	1,640,880	21,762	1.33
<b>Maintenance:</b>				
Personal Services	465,350	449,950	(15,400)	(3.42)
Materials and Supplies	383,722	484,680	100,958	20.83
Contractual Services	23,249	52,600	29,351	55.80
TOTAL MAINTENANCE	872,321	987,230	114,909	11.64
Transfer to Capital Projects	---	---	---	N/A
Transfer to Risk Management	---	---	---	N/A
<b>TOTAL EXPENDITURES</b>	<b>3,136,241</b>	<b>3,310,822</b>	<b>174,581</b>	<b>5.27</b>
<b>EXCESS (DEFICIT) OF REVENUES OVER EXPENDITURES</b>	<b>\$ 331,231</b>	<b>\$ (349,642)</b>	<b>\$ 680,873</b>	<b>194.73</b>

QUARTERLY RIDERSHIP REPORT  
2ND QUARTER 1983-1984

	OCTOBER			NOVEMBER		
	'83-'84	'82-'83	% CHANGE	'83-'84	'82-'83	% CHANGE
FAREBOX REVENUE *	116,820	103,530	+12.8	115,009	106,130	+ 8.4
PERSON TRIPS *	279,499	254,841	+ 9.7	268,894	246,155	+ 9.2
WEEKLY SCHEDULE HOURS	3,568	3,590	— .6	3,568	3,590	— .6
PRODUCTIVITY	18.2	16.6	+ 9.6%	18.3	16.4	+11.6%

	DECEMBER			YEAR TO DATE			
	'83-'84	'82-'83	% CHANGE	TDP GOAL	'83-'84	'82-'83	% CHANGE
FAREBOX REVENUE *	120,827	108,143	+11.7	630,694	616,148	563,636	+ 9.3
PERSON TRIPS *	287,700	235,272	+22.3	1,451,341	1,533,544	1,381,590	+11.0
WEEKLY SCHEDULE HOURS	3,785	3,590	+ 5.4	--	--	--	--
PRODUCTIVITY	17.6	15.7	+12.1%	20.1	16.3	15.1	+ 7.9
EFFICIENCY				1.47	1.34	1.52	11.8
USER FUNDING				28.4%	19.6%	18.3%	+ 7.1

\* SEE GRAPH



461510

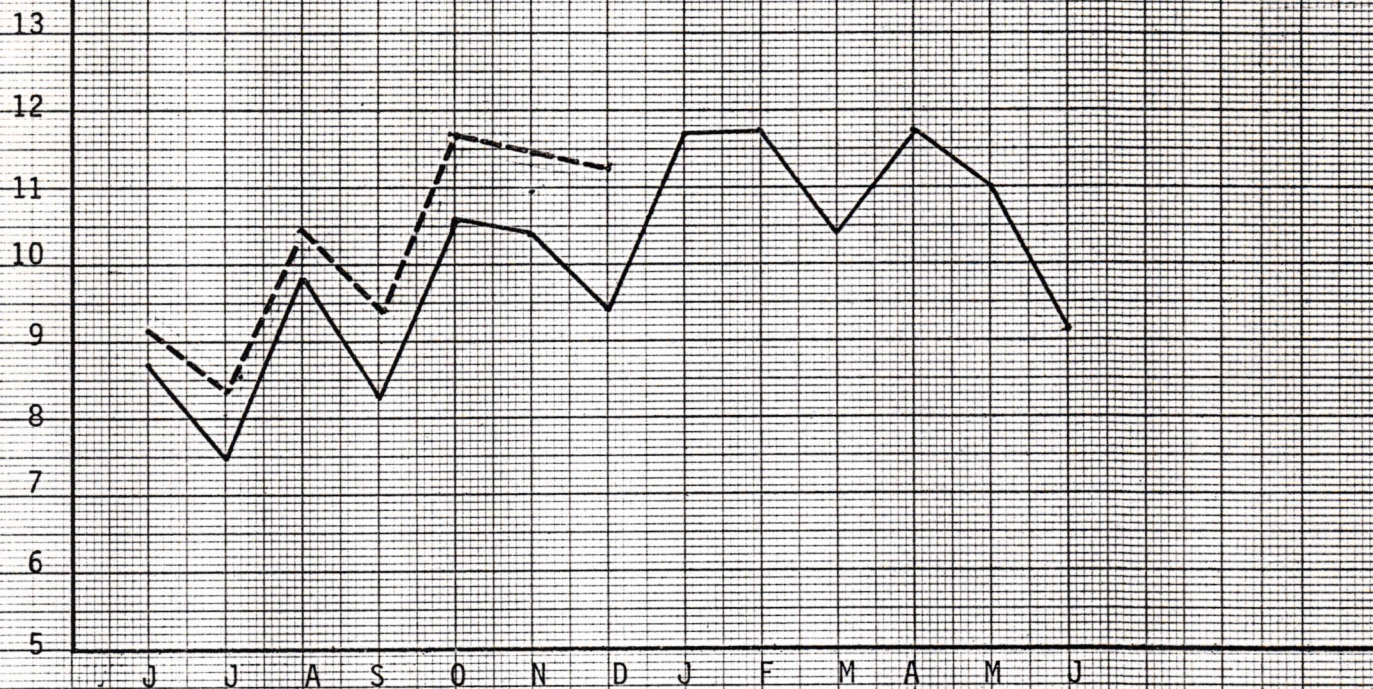
10 X 10 TO THE CENTIMETER 18 X 25 CM  
KEUFFEL & ESSER CO. MADE IN U.S.A.

THOUSANDS OF TRIPS (x1000)

# AVERAGE WEEKDAY PERSON TRIPS

FISCAL YEAR 1982-83

FISCAL YEAR 1983-84

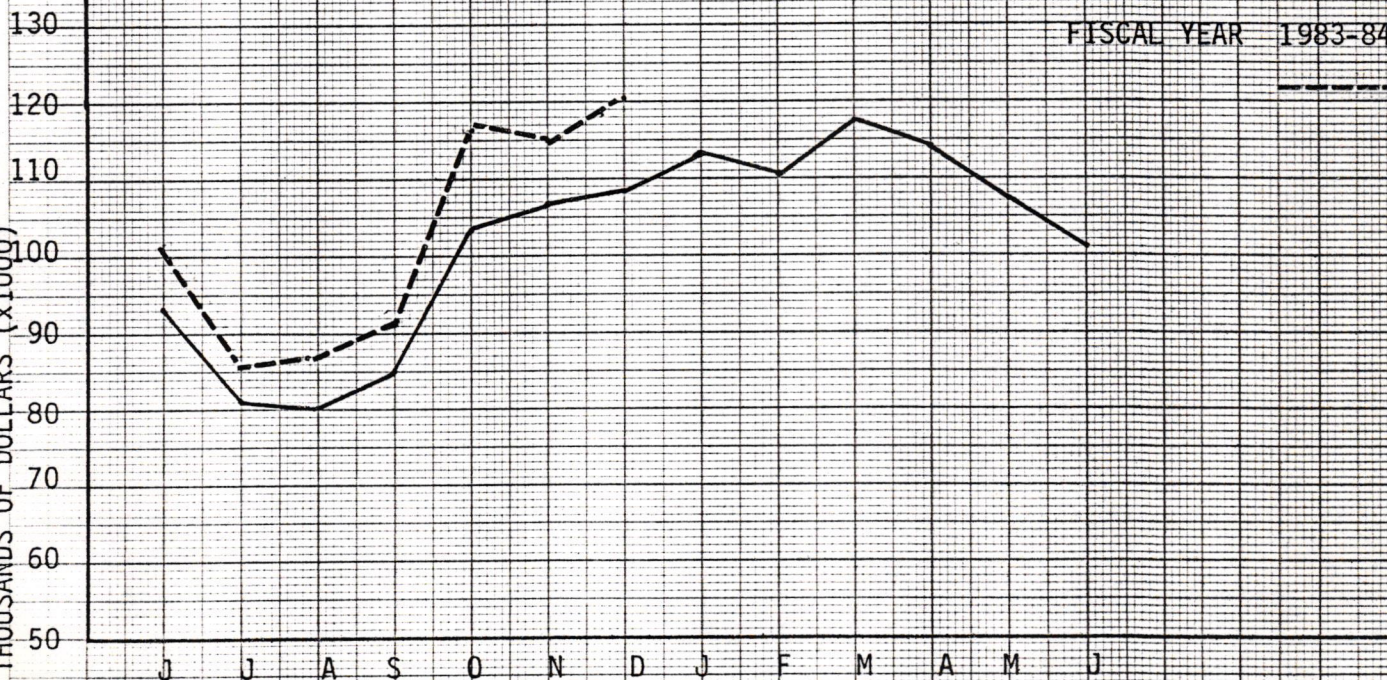


THOUSANDS OF DOLLARS (x1000)

# FAREBOX REVENUE

FISCAL YEAR 1982-83

FISCAL YEAR 1983-84





# OPERATIONS SUMMARY

Oct/Nov/Dec 1983

## OCTOBER

## NOVEMBER

	83-84	82-83	% CHANGE	83-84	82-83	% CHANGE
On Time Performance	96.97%	98.00%	-1.05%	99.33%	97.36%	+2.02%
Safe Miles Between Accidents/Incidents	20,524	26,466	-22.45%	44,490	46,912	-5.16%
Miles Between Breakdown	6,656.3	----	----	6,951.5	----	----
Total Miles	246,283	238,193	+3.40%	222,450	234,275	-5.05%
Complaints	26	24	N/A	23	13	N/A
Compliments	4	5	N/A	2	2	N/A

## DECEMBER

## YEAR TO DATE

	83-84	82-83	% CHANGE	GOAL	83-84	82-83	% CHANGE
On Time Performance	98.48%	95.97%	+2.62%	97.00%	98.50%	97.97%	+.54%
Safe Miles Between Accidents/Incidents	30,429	40,549	-24.96%	38,000	33,447	33,293	+.46%
Miles Between Breakdowns	15,214.6	----	----	15,000	8,631.2	----	----
Total Miles	213,005	243,298	-12.45%	N/A	1,341,790	1,364,725	-1.68%
Complaints	11	17	N/A	-5%	90	95	-5.26%
Compliments	3	0	N/A	N/A	13	10	N/A