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Meeting Notes 1987-09-28

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A G E N D A

JPACT Work Session: Regional LRT Corridors

September 28, 1987

3:00 - 6:00 p.m.

- A. Introduction - Richard Waker
- B. Follow-Up From Previous Meeting - Andy Cotugno
 - . *Summary of Comments
 - . Results of meetings 1 and 2 will be summarized for third meeting as follows: issues supported by JPACT, issues requiring further discussion, and issues to be decided at a later point in the process
 - . Schedule discussion of regional transportation "vision" at meeting 3
- *C. Overview of LRT Policy Issues - Andy Cotugno
- *D. Review of Technical Comparison of LRT Corridors - Richard Brandman
- *E. Overview of Funding Options - G.B. Arrington
- F. Review of Hypothetical Funding Models - Andy Cotugno
- G. Discussion of LRT Policy Issues - Richard Waker
 - Comments from jurisdictions/agencies: "What should the regional priority transit package include?"
 - . City of Portland
 - . Counties
 - . ODOT
 - . Port of Portland
 - . Tri-Met

*Handouts

Summary of Comments

- Multnomah Co.:
- . Support existing development patterns
 - . Facilitate growth and new development
 - . Enhance Multnomah County as gateway to the recreation areas at Mt. Hood and the Columbia Gorge
- Clackamas Co.:
- . Establish an Urban Arterial Program
 - . Suburban travel problems are of regional significance; Sunrise Corridor is #1 highway priority; Initiate PE on the Highway 224 extension soon
 - . I-205 LRT is #1 transit priority
- Washington Co.:
- . Continue to support downtown because of importance to the regional economy
 - . Increase improvement of suburban system to keep up with the high rate of population and employment growth; Suburban travel is of regional significance
 - . Direct transportation resources to solve transportation problems -- including support to committed growth areas and existing developed areas
 - . Maintain Sunset LRT as next regional LRT priority corridor; maintain regional consensus on the importance of the role for transit expansion
 - . Regional process should recognize local funding initiatives
- City of Portland:
- . The Central City is strong and healthy and significant developments are underway or planned; the level of employment growth is just as significant as elsewhere
 - . Transit expansion is vital to the region; Sunset LRT should remain #1 regional priority; I-205 LRT is also a good idea to pursue
 - . Suburban development is clearly significant and requires transportation improvement
- ODOT:
- . Make the radial system function properly in order to support a continued strong downtown; transit and highway improvement are essential to accomplish this

- . Develop an adequate suburban transportation system in order to keep pace with the high rate of development (the doughnut)
- . Improve connections for the State highway system into and through the Portland region

Tri-Met:

- . Tri-Met can continue to operate with no new taxes and no service cuts -- if the region needs transit service expansion, it will need to help secure funding
- . Funding for capital improvements must include sufficient funding for operations
- . Corridors that minimize regional need for operating subsidy will be considered higher in priority

Port of Portland:

- . Greater attention should be given to midday level of service to ensure adequate truck access throughout the region
- . Transportation funding should be based on the user fee principle -- covering both trucks and cars; property taxes are inappropriate
- . Consider using highway funds for transit
- . Priorities for funding should recognize the need for a comprehensive system

LRT Policy Issues

- I. Should the region continue to pursue a joint transit expansion/highway approach to serving development -or- shift to a lesser transit and a greater highway emphasis?
- II. Should the region be pursuing an LRT system as a major component of the region's transit expansion objectives? Possible criteria:

Inherent Advantages of LRT

- . Provides fast, reliable, high-quality service to the rider
- . Because of attractiveness, LRT is more likely to attract the high ridership objective called for in the RTP than bus service expansion
- . LRT is more likely to provide the needed highway capacity supplement than bus service expansion
- . Operating cost per rider is less than bus service in heavily traveled corridors (greater than 2,000 riders in the peak hour, peak direction)
- . Provides service to existing high density areas and serves and encourages development of planned high-density areas
- . Attracts broader transit ridership market than bus service (more than commuters and transit dependent) providing increased farebox and access to new retail markets
- . Quick and economical to expand capacity once in place
- . Relieves bus capacity limitations of the downtown transit mall
- . Cleaner, quieter than buses
- . Proven mode of transportation

Inherent Disadvantages of LRT

- . High capital cost
- . Operating cost per rider higher than bus service in lightly traveled corridors (less than 2,000 riders in the peak hour, peak direction)
- . Inflexible -- can't be moved and represents a long-term operating cost obligation
- . LRT operating costs could compete for bus service expansion elsewhere in the region

- . Best suited in regional travel corridors where local bus service (and frequent stops) is not necessary

III. If the region should be pursuing an LRT system...should we advance more corridors than one? Which corridors? Using what criteria? (Note: The decision at hand is whether or not to "pursue" LRT; more detailed information and commitments are necessary at a later date to make a decision to "build" LRT.)

Possible Criteria for Pursuing Multiple Corridors

- . Federal restrictions
- . Lead agency capacity
- . Local match availability
- . Short-term need/short-term opportunities

Potential Corridor Selection Criteria

- . Degree of importance to the operation of the transportation system
 - a) Ridership increase
 - b) Effect on highway operation (congestion)
 - c) Comparison to highway expansion requirements
 - d) Quality of transit service provided
 - e) Effect on efficiency of other parts of the transit system
- . Degree of benefit as compared to cost (capital plus operating)
 - a) As compared to bus service expansion
 - b) As compared to existing bus service
- . Degree to which there are direct economic development advantages
- . Degree to which environmental objectives are enhanced (neighborhood traffic, downtown diesel emissions)
- . Ability to exploit funding opportunities
- . Supported by actions to reduce regional capital and operating cost burden

YEAR 2005 TRUNK OPERATING COSTS

(MILLIONS 1987 \$)

| | <u>COMMITTED</u> | <u>RTP</u> | <u>LRT</u> |
|----------------|------------------|------------|------------|
| 1. WESTSIDE | \$2.92 | \$4.18 | \$4.16 |
| 2. MILWAUKIE | \$1.59 | \$2.28 | \$2.34 |
| 3. I-5 | \$1.94 | \$3.08 | \$2.77 |
| 4. I-205 NORTH | \$ 0 | \$0.51 | \$1.07 |
| I-205 SOUTH | \$ 0 | \$0.63 | \$1.25 |
| 5. BARBUR | \$1.81 | \$2.60 | \$2.64 |
| 6. LAKE OSWEGO | \$1.25 | \$1.36 | \$1.97 |

YEAR 2005 LRT RIDERSHIP

AVERAGE DAILY WEEKDAY

| | | |
|----|-------------|--------|
| 1. | WESTSIDE | 29,800 |
| 2. | MILWAUKIE | 14,000 |
| 3. | I-5 | 21,700 |
| 4. | I-205 NORTH | 8,250 |
| | I-205 SOUTH | 11,100 |
| 5. | BARBUR | 27,800 |
| 6. | LAKE OSWEGO | 8,000 |

RB:LMK
9-25-87

TRAVEL TIME SAVINGS TO PORTLAND CBD

| | <u>MINUTES</u> | <u>PERCENT</u> |
|----------------|----------------|----------------|
| 1. WESTSIDE | 9 | 29% |
| 2. MILWAUKIE | 9 | 31% |
| 3. I-5 | 15 | 37% |
| 4. I-205 NORTH | 9 | 23% |
| I-205 SOUTH | 14 | 26% |
| 5. BARBUR | 14 | 37% |
| 6. LAKE OSWEGO | 8 | 25% |

TRUNK RIDERSHIP

P.M. PEAK HOUR, PEAK LOAD POINT

| | <u>COMMITTED</u> | <u>RTP</u> | <u>LRT</u> |
|----------------|------------------|------------|------------|
| 1. WESTSIDE | 2,600 | 3,520 | 4,225 |
| 2. MILWAUKIE | 1,900 | 2,540 | 2,750 |
| 3. I-5 | 1,750 | 2,530 | 3,250 |
| 4. I-205 NORTH | 0 | 150 | 550 |
| I-205 SOUTH | 0 | 1,050 | 1,250 |
| 5. BARBUR | 1,350 | 2,420 | 3,475 |
| 6. LAKE OSWEGO | 830 | 900 | 1,150 |

INITIAL CAPITAL COST

(1985 \$)

| | | | |
|----|-------------|---------------|-----------------------|
| 1. | WESTSIDE | \$235,000,000 | 185TH |
| 2. | MILWAUKIE | \$ 79,000,000 | PTC |
| | | \$ 88,000,000 | McLOUGHLIN |
| 3. | I-5 | \$132,000,000 | VANCOUVER |
| | | \$ 87,000,000 | EXPO CENTER |
| 4. | I-205 NORTH | \$ 39,000,000 | AIRPORT |
| | I-205 SOUTH | \$ 50,000,000 | CLACKAMAS TOWN CENTER |
| 5. | BARBUR | \$163,000,000 | TIGARD |
| | (1987 \$) | \$204,000,000 | TUALATIN |
| 6. | LAKE OSWEGO | \$126,000,000 | TUALATIN |
| | (1987 \$) | \$105,000,000 | MARYLHURST |

SYNOPSIS OF FINANCING OPTIONS

FOR LIGHT RAIL

PRESENTED TO

JOINT POLICY ADVISORY COMMITTEE ON TRANSPORTATION

Prepared by:

**Strategic Planning Office
Public Services Division
Tri-Met
September 1987**

JPACT MEETING TWO

SYNOPSIS OF FINANCING OPTIONS FOR LIGHT RAIL

INTRODUCTION

The purpose of this presentation is to paint a picture of what sources of funds and techniques are available to fund expansion of light rail in the region. The presentation is organized into three sections: Tri-Met's capability and revenue powers; the changing federal role in rail transit; and what has worked or is being considered elsewhere.

I. TRI-MET FINANCIAL CAPABILITY AND REVENUE POWERS

- A. The good news is that Tri-Met can attract new riders and provide an improved stable transit system without service cuts, fare increases, or new taxes. This is a significant change from the situation just over a year ago when Tri-Met required \$6 to \$10m in revenues to operate the existing system. The 5-year Transit Development Plan lays out the strategy and assumptions to accomplish this.
- B. The bad news is that Tri-Met cannot fund the capital or operating costs of an expanded system with current revenues. That means that the decision to build a new rail project must be based on securing the capital and operating funds for the project.
- C. The legislature gave Tri-Met a very broad grant of authority to raise revenues to construct and operate a transit system. The authority is sufficient if implemented to cover the costs of an expanded system. A regional income tax, property tax, and business license fees are authorized sources which could be tapped, given sufficient political will.
- D. See Table 1 and Table 2 for a short history of Tri-Met taxation and a summary of revenue source options.

II. THE CHANGING FEDERAL ROLE IN RAIL TRANSIT

- A. The Federal Government continues to be a major partner in funding new rail starts. The primary federal source for transit capital is one cent of the federal gas tax. It is important to keep in mind that demand for these funds far exceeds the supply of about \$1.5 billion generated annually.

- B. In response to intense national competition for limited funds, Congress and the Administration have responded with "entry criteria" for federal funding of major transit capital investments. The major source of that funding is UMTA Section 3 funds. All rail projects seeking Section 3 funds must comply with the entry criteria.
- o The administration has set a goal of 50% local 50% Section 3 for funding qualified projects; the federal share set in the Surface Transportation Act is 75%. This is a problem of limited federal resources and high deficits which will presumably extend beyond this administration.
 - o In 1984 UMTA established a cost-effectiveness index to help sort out projects based on their worthiness for federal investment. The procedure establishes thresholds and a national index for projects. The criteria allows projects to buy a higher rating by increasing the local share.
 - o The Westside LRT rates very well in competition nationally with other projects seeking UMTA funding. That means the Westside stands a good chance of receiving up to 75% of the cost to construct the project from UMTA.
 - o The new Transportation Act requires the Secretary of Transportation to determine a project "is supported by an acceptable degree of local financial commitment, including evidence of stable and dependable funding sources to construct, maintain, and operate the system" before a project can receive approval to do final design or receive a Letter of Intent from Congress.
 - o Under UMTA's rules, only one project at a time per region is allowed to go through the process and compete for federal funding.
 - o Finally, an expanded role for the private sector in financing transportation investments is being encouraged to help fill the gap left by the diminishing federal role.

C. There are a variety of federal sources which can be tapped to fund new rail projects. In the past few years locally the problem has been finding local funds to match the federal funds we have. Federal sources available for rail funding in addition to UMTA Section 3 funds include:

- UMTA Section 3 Westside Letter of Intent -- A one-time-only source limited to non-rail projects. Congress could lift the limitation.
- UMTA Section 9 -- Formula funds received annually for operating, capital, and planning. The level of funding is inadequate to meet Tri-Met's current routine requirements.
- FHWA Federal Aid Urban -- Formula highway funds received annually by the City of Portland and the remainder of the region which could be used for transit.
- Interstate withdrawal funds -- one-time-only funds that can be used for highway or transit
- I-205 withdrawal busway funds -- one-time-only funds can only be used for rail in the I-205 corridor, must be in PE by September 1989.
- UMTA demonstration grants -- competitive funds from a small pot, has never been used for rail

III. WHAT HAS WORKED OR IS BEING CONSIDERED ELSEWHERE FOR RAIL PROJECTS

Looking quickly around the country, no prevalent method emerges for regions who have successfully pursued funding rail projects. Some areas have gone to the voters, others to their legislature, some have completely avoided UMTA, and many now are looking to innovative techniques to play a key role.

A. Regional votes to establish capital and operating funding for expanded systems

- | | | |
|---|-------------|------------------------------|
| o | Atlanta | 1% local sales tax |
| o | Miami | local sales and property tax |
| o | Houston | 1% local sales tax |
| o | Dallas | 1% local sales tax |
| o | Los Angeles | 1/2% county sales tax |
| o | Seattle | 6/10% county sales tax |

B. Legislative action for rail

- o Baltimore 100% of match from state consolidated transportation fund
- o Buffalo 50% match from state
- o Portland 65% local match from state
- o California 1/4% state sales tax for capital and operating

C. Non-UMTA route for rail capital funding

- o San Diego LRT state gas tax
state sales tax
- o Los Angeles
Long Beach LRT 1/2% county sales tax
Century LRT FHWA busway funds & 1/2%
county sales tax
- o Atlanta Extension 1% sales tax
- o BART property & sales tax
bridge tolls

D. Some innovative funding strategies

- o The goal for utilizing creative financing techniques is to reduce the public share in transit projects by involving some of the direct beneficiaries of the project.
- o Creative techniques need to be tailored to local situations and changes in financial markets. Consequently, there are no standard role models to follow.
- o Innovative techniques mentioned for transit fall into three broad areas:
 - tax advantaged financing
 - . federal tax credits
 - . tax-free bonds
 - . leases
 - real estate techniques
 - . land donations
 - . special assessment districts
 - . tax increment financing
 - . joint development
 - vendor roles
 - . vendor financing
 - . turnkey arrangements

- o Some recent transit examples of innovative financing concepts
 - Houston considering using the turnkey approach to design, construct, and operate a new rail line. Pledge up to \$100 million in local funds annually.
 - Los Angeles benefit assessments proposed to cover 10% of cost for phase one of the metro rail
 - Denver Transit construction authority created by state with power to assess commercial property and levy a head tax in mile wide transit corridor
 - Miami \$20m generated from downtown special assessments for the people mover
 - Dulles LRT Funding package being proposed with no UMTA role along the following lines:
 - 50% tax exempt revenue bonds backed by local taxes
 - 20% federal tax credits
 - 13% benefitted developers
 - 17% benefitted governments

GBII:jpact2

TABLE I

SHORT HISTORY

OF

TRI-MET TAXATION

I. Authorized Taxes

- . Payroll Tax
- . Self-Employment Tax
- . Business License Fees
- . Personal and Corporate Income Tax
- . Property Tax

II. Taxes Currently Collected

- . Payroll Tax
 - .5% 1/1/70 - 12/13/70
 - .3% 1/1/71 - 12/31/74
 - .4% 1/1/75 - 12/31/75
 - .5% 1/1/76 - 6/30/78
 - .6% 7/1/78
- . Self Employment Tax
 - .6% 4/1/83
- . State In-Lieu of Pay Roll Tax
 - .6% 7/1/81

III. Taxes Suggested or Tried

- | | | |
|---------------------|---------|---|
| . Gas Tax | 1973-74 | Considered |
| . Auto Registration | 1976 | Defeated by voters |
| . Income Tax | 1980 | Considered |
| . | 1986 | Defeated by Board Vote |
| . Lottery | 1984 | Insufficient signatures for initiative |
| . Parking Tax | 1985 | Considered and dropped |
| . Automobile Tax | 1985 | Considered and dropped |
| . Petroleum Tax | 1985 | Passed by Board, quashed by courts on technicality |
| . Wage Tax | 1987 | Passed by Senate, died in house |

IV. Tax Authority Repealed by Legislature

- . Sales Tax
- . Auto Registration Fee
- . Supplemental Business License Fee

TABLE II

Summary

REVENUE SOURCE OPTIONS

| <u>Revenue Source Options</u> | <u>Collection Presently Authorized</u> | <u>Voter Approval Required</u> | <u>Annual Revenue Potential</u> |
|---|--|--------------------------------|---|
| Payroll Tax on Employers | Yes | No | \$42m @ .6% limit |
| Payroll Tax on Self-Employed Earnings | Yes | No | \$2.5m @ .6% limit |
| Payroll Tax (in lieu) on State Employees | Yes | No | \$1.4m @ .6% limit |
| Payroll Tax on Local Government Employees | No | -- | \$1.6m for general purpose governments |
| Business and Personal Income Tax | Yes | No | \$51.6m @ 1% of taxable income after deductions |
| Business License Fees | Yes | No | Varies |
| Regional Gas Tax | Yes | No | \$22m @ 5 cents/gallon (1) |
| Commuter Parking Tax | Yes | No | \$2.6m @ 15% of gross receipts |
| Automobile Dealers Tax | Yes | No | \$7.3m @ 1% of gross receipts |
| Petroleum Tax | Yes | No | \$10.5m @ 1% of gross receipts |
| Ad Valorem Tax - for Bonds | Yes | Yes | \$610m |
| Ad Valorem Tax - for General Purposes | Yes | Yes | Unlimited |
| Ad Valorem Tax - for Revolving Fund | Yes | Yes | \$36.6m |

(1) State Constitution limits expenditure of revenues to operation and maintenance of roads and highways, exclusively.

**SUMMARY OF FEDERALLY FUNDED
MAJOR TRANSIT CAPITAL PROJECTS
CURRENTLY UNDER DEVELOPMENT**

NOW IN FINAL DESIGN & CONSTRUCTION PHASE

| <u>CITY</u> | <u>PROJECT</u> | <u>LOCAL SHARE</u> |
|---------------|----------------------|--------------------|
| Houston | SW Busway | 50% |
| | NW Busway | 40% |
| Jacksonville | Downtown Peoplemover | 56% |
| Seattle | Bus Tunnel | 50% |
| Santa Clara | Light Rail | 50% |
| San Diego | Light Rail | 36% |
| Los Angeles | Heavy Rail, 4 miles | 50% |
| Atlanta | N/S Heavy Rail | 75% |
| Washington DC | Heavy Rail | |

NOW IN PRELIMINARY ENGINEERING PHASE

| | | |
|-------------|-----------------------|-----------|
| Atlanta | East Heavy Rail | 25% |
| Los Angeles | Heavy Rail, 12 miles | 40% |
| Miami | Downtown People Mover | 25% |
| St. Louis | Light Rail | 0 to 25% |
| Portland | Westside Light Rail | 25 to 50% |

TABLE I V

SUMMARY OF INCOME SOURCES FOR LOCAL SHARE
OF NEW RAIL STARTS

| <u>NEW RAIL START</u> | <u>SOURCE OF INCOME</u> | <u>VOTER REFERENDUM</u> | <u>DEDICATED TO CAPITAL</u> | <u>PERCENT OF LOCAL SHARE</u> |
|----------------------------------|--|---------------------------|--|-------------------------------|
| Atlanta; Marta | 1% regional sales tax for construction of rail project. | Yes | Yes-Funds go to bonds then to operations | 100% |
| Baltimore | State Consolidated Transportation Trust Fund finances 100% local share. Financed from a variety of sources. | No | Yes | 100% |
| Miami; Metro-Dade | Property tax of one-quarter mill for debt service on transit bonds. .5% share of 1.2% sale-levied sales tax dedicated to secure transit bonds in 1982. | Yes ? | Yes Yes | 100% |
| Miami; "People Mover" | Downtown special assessment will support \$27 million in bonds. | possibility | Yes | 100% |
| Washington, D.C. WMATA | Maryland, state pays 100% local share from consolidated transportation trust fund. Virginia, state contributions from general revenues of about \$21m per year. 2% regional gas tax in N. Virginia produces about \$8m per year | No No NA | Yes Yes NA | NA NA NA |
| San Diego, MTDB | All project funding was provided by the State of California. state gas tax, Prop. 5 State sales tax revenues, TDA | Yes Yes | Yes-Fixed Guideway No | 90% 10% |
| Buffalo | State of New York provided 50% Local share. | No | Yes | 50% |
| Portland, Tri-Met | State light rail construction fund establish for project Tri-Met payroll tax | No No | Yes No | 65% 35% |
| Philadelphia, Lindenwold Line | Delaware River Port Authority bridge tolls cover debt service on transit bonds | No | NA | 100% |
| Los Angeles, Metro Rail | Special assessments for station areas will generate about \$170 in bonding capacity Proposition A passed in 1980 dedicated 5% sales tax to transit. 60% dedicated to capital, including metro rail (35%) State gas tax revenues, prop. 5 | possibility Yes Yes | Yes Yes-60% for capital Yes-Fixed guideway | 13% NA NA |

Sample Funding Scenarios: Westside LRT

(\$235 m. total capital cost)

Assumes project can successfully compete for Section 3 Discretionary funding. Two levels of state role in funding the project are assumed tied to Banfield experience for transit share. State role presumed because of benefits to the highway system.

1. Maximum State Role

| | <u>@ 60/40</u> <u>Fed. Share</u> | <u>@ 75/25</u> <u>Fed. Share</u> |
|--|-------------------------------------|-------------------------------------|
| Capital Requirements | | |
| Section 3 | \$141.0 m | \$176.0 m |
| State (same % share as MAX 65% of local share) | 61.0 m | 38.0 m |
| Private (up to 10% private) Tax advantaged financing, real estate, vendor role | 23.0 m | 21.0 m |
| Unfunded Balance | 10.0 m ¹ | 0 |
| Bonded at 10% for 30 years | 1.0 m/year | 0 |
| Operating Requirements | | |
| Net operating cost difference ("Committed" bus trunk route vs. rail) | <u>+1.25m/year</u> | <u>+1.25m/year</u> |
| Total Annual Unfunded Balance | \$ 2.25m/year | \$ 1.25m/year |

2. Modest State Role

| | | |
|--|---------------------|---------------------|
| Capital Requirements | | |
| Section 3 | \$141.0 m | \$176.0 m |
| State (same cash contribution as with MAX) | 25.0 m | 25.0 m |
| Private (10% project) Tax advantaged financing, real estate, vendor role | 23.0 m | 23.0 m |
| Unfunded Balance | 46.0 m ¹ | 11.0 m ¹ |
| Bonded at 10% for 30 years | 5.0 m/year | 1.25/year |
| Operating Requirements | | |
| Net operating cost difference ("Committed" bus trunk route vs. rail) | <u>+1.25m/year</u> | <u>+1.25m/year</u> |
| Total Annual Unfunded Balance | \$ 6.25m/year | \$ 2.5 m/year |

¹Potential sources for unfunded balance: local, regional or other federal sources such as Interstate Transfer, FAU, Section 3 Letter of Intent.

Sample Funding Scenarios: I-205

(\$88 m. total capital cost)

Assumes project cannot compete for Section 3 based on UMTA cost effectiveness criteria. Avoids UMTA Rules and Procedures. Allows development of two corridors at the same time.

1. Maximum Federal Participation

Capital Requirements

| | |
|---|---------------------|
| FAA 75% of Airport to Gateway | \$31.5 m |
| Busway withdrawal | 16.635m |
| Private (10% project) | 8.8 m |
| Tax advantaged financing, real estate, vendor role | |
| Unfunded Balance | 31.0 m ¹ |
| Bonded at 10% for 30 years | 3.4 m/year |
| Operating Requirements | |
| Net operating cost difference ("Committed" bus trunk route vs. LRT) | <u>+2.3 m/year</u> |
| Total Annual Unfunded Balance | \$ 5.7 m/year |

2. Moderate Federal Participation

Capital Requirements

| | |
|---|---------------------|
| FAA 75% on airport property | \$ 5.6 m |
| Busway withdrawal | 16.635m |
| Maximum Private (15% private) | 13.0 m |
| Tax advantaged financing, real estate, vendor role | |
| Unfunded Balance | 52.8 m ¹ |
| Bonded at 10% for 30 years | 5.0 m/year |
| Operating Requirements | |
| Net operating cost difference ("Committed" bus trunk route vs. LRT) | <u>+2.3 m/year</u> |
| Total Annual Unfunded Balance | \$ 7.3 m/year |

¹Potential sources for unfunded balance: local, regional or other federal sources such as Interstate Transfer, FAU and Section 3 Letter of Intent.

EXCERPTS
FROM
1986 SURVEY OF
STATE INVOLVEMENT IN
PUBLIC TRANSPORTATION

1986 SURVEY OF STATE INVOLVEMENT IN PUBLIC TRANSPORTATION

URBANIZED

FUNDING SOURCES

RESEARCH AND DEMONSTRATION

LOCAL AID

FAREBOX REVENUES

RIDESHARE

FINANCIAL ASSISTANCE

INTERCITY BUS

TRANSIT BUDGETS

TECHNICAL ASSISTANCE

INDIRECT AID

EXPENDITURES

FEDERAL AID

CAPITAL COSTS

PLANNING AND TECHNICAL ASSISTANCE

STATE AID

OPERATING COSTS

SPECIALIZED TRANSIT

DIRECT AID

NONURBANIZED

A Report of the
Standing Committee on
Public Transportation



Figure 2
*State and Federal
Financial Aid For
Public Transportation*

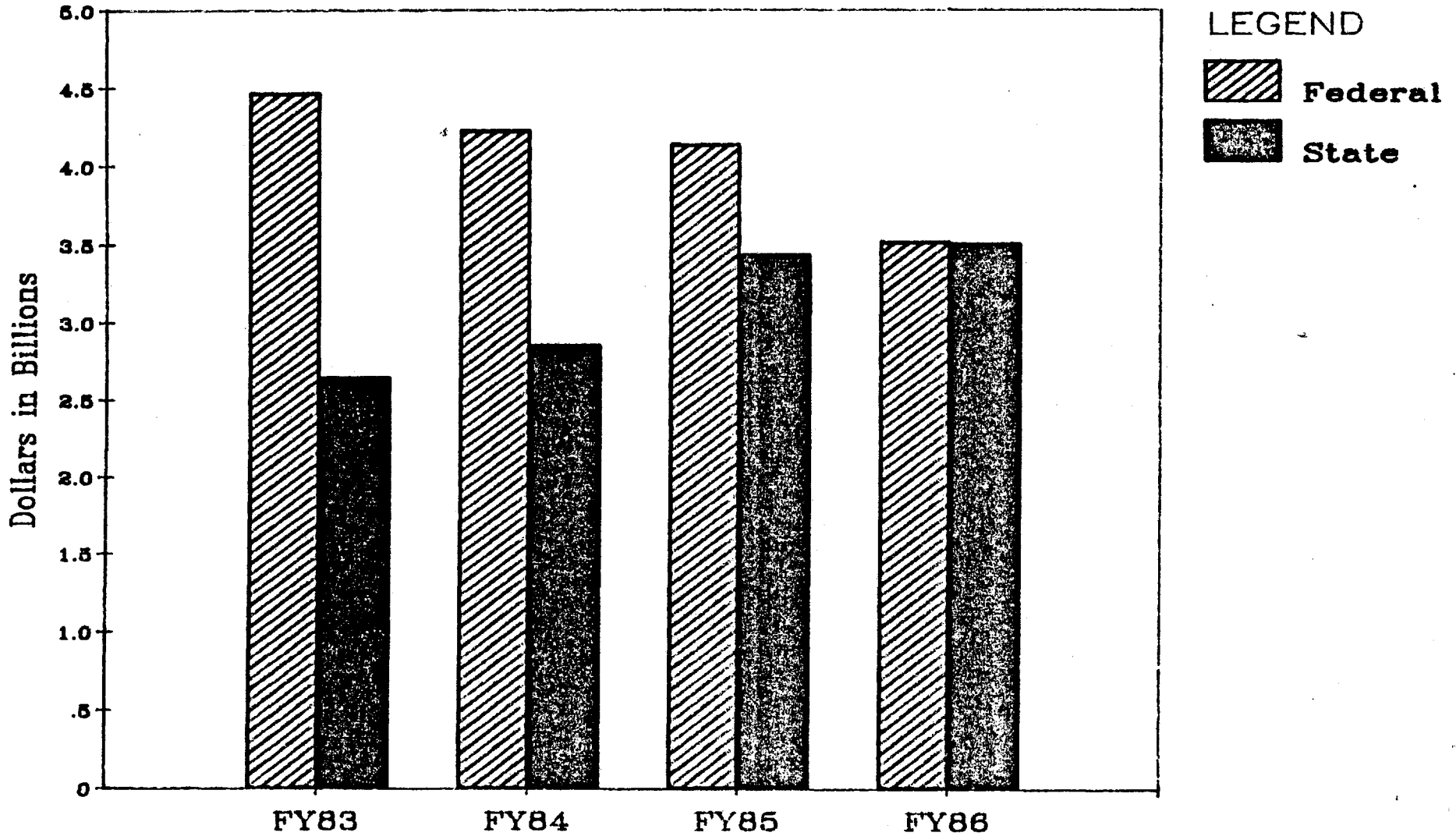
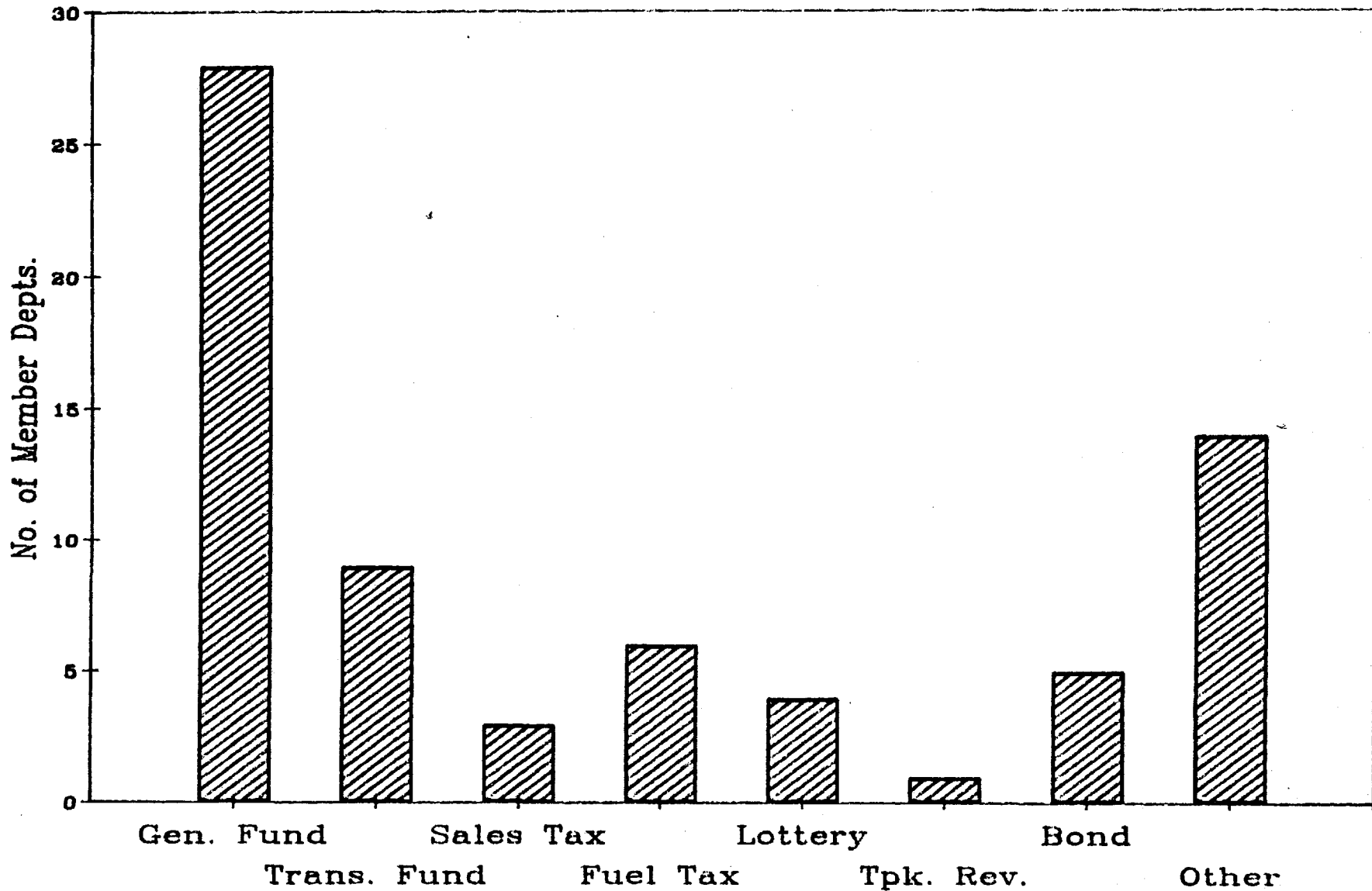


TABLE 6
STATE FUNDING FOR PUBLIC TRANSIT (URBANIZED AREAS)
FISCAL YEAR 1986

| STATE | Direct Aids | Indirect Aids | Total |
|----------------|-------------------------|--------------------------|-------------------------|
| Alabama | \$ 0 | \$ 0 | \$ 0 |
| Alaska | 0 | 0 | 0 |
| Arizona | 6,870,000 | 0 | 6,870,000 |
| Arkansas | 46,000 | 0 | 46,000 |
| California | 59,064,000 | 492,426,000 | 551,490,000 |
| Colorado | 0 | 0 | 0 |
| Connecticut | 68,912,000 | 0 | 68,912,000 |
| Delaware | 2,319,000 | 0 | 2,319,000 |
| D.C. | 104,700,000 | 0 | 104,700,000 |
| Florida | 11,256,000 ^a | 0 | 11,256,000 |
| Georgia | 973,000 | 141,500,000 ^b | 142,473,000 |
| Hawaii | 0 | 0 | 0 |
| Idaho | 0 | 0 | 0 |
| Illinois | 167,900,000 | 0 | 167,900,000 |
| Indiana | 11,119,000 | 2,756,000 | 13,875,000 |
| Iowa | 669,000 | 0 | 669,000 |
| Kansas | 0 | 0 | 0 |
| Kentucky | 496,000 | 0 | 496,000 |
| Louisiana | 6,984,000 | 0 | 6,984,000 |
| Maine | 213,000 | 0 | 213,000 |
| Maryland | 202,081,000 | 0 | 202,081,000 |
| Massachusetts | 218,512,000 | 0 | 218,512,000 |
| Michigan | 68,841,000 ^c | 0 | 68,841,000 |
| Minnesota | 30,007,000 ^d | 0 | 30,007,000 |
| Mississippi | 0 | 0 | 0 |
| Missouri | 0 | 0 | 0 |
| Montana | 75,000 | 0 | 75,000 |
| Nebraska | 528,000 | 0 | 528,000 |
| Nevada | 340,000 | 0 | 340,000 |
| New Hampshire | 0 | 0 | 0 |
| New Jersey | 209,600,000 | 0 | 209,600,000 |
| New Mexico | 0 | 0 | 0 |
| New York | 815,000,000 | 181,500,000 | 996,500,000 |
| North Carolina | 952,000 | 0 | 952,000 |
| North Dakota | 0 | 0 | 0 |
| Ohio | 28,631,000 | 0 | 28,631,000 |
| Oklahoma | 0 | 0 | 0 |
| Oregon | 2,000,000 | 3,400,000 | 5,400,000 |
| Pennsylvania | 201,000,000 | 0 | 201,000,000 |
| Puerto Rico | 0 | 0 | 0 |
| Rhode Island | 7,757,000 | 0 | 7,757,000 |
| South Carolina | 562,000 | 0 | 562,000 |
| South Dakota | 0 | 0 | 0 |
| Tennessee | 1,617,000 | 0 ^e | 1,617,000 |
| Texas | 9,545,000 ^f | 0 | 9,545,000 ^f |
| Utah | 0 | 24,800,000 | 24,800,000 |
| Vermont | 0 | 0 | 0 |
| Virginia | 29,986,000 ^g | 9,000,000 | 38,986,000 ^g |
| Washington | 0 | 62,398,000 | 62,398,000 |
| West Virginia | 107,000 | 0 | 107,000 |
| Wisconsin | 37,062,000 | 0 | 37,062,000 |
| Wyoming | 0 | 0 | 0 |

- a. Includes Urban Capital - \$5,597,000; Urban S/D - \$680,000; Major Corridor - \$2,145,000; Fixed Guideway - \$2,834,400.
- b. Transit tax authorized and collected by the state of Georgia in metro Atlanta counties is subject to local referendum under authority of 1981 Act of the General Assembly. Funds are distributed to MARTA without appropriation or inclusion in the state budget.
- c. Includes Urban Operating, Ferry, Supplemental Operating, Capital (\$3,000,000).
- d. Includes administrating and planning dollars for the Regional Transit Board.
- e. Cities and counties receive a portion of the statewide motor fuel taxes and can use up to 2/7 of such revenue for public transit. The amounts actually used for transit are not readily available.
- f. Funds are available for FY 86 and FY 87 biennium.
- g. See comment Table 1.

Figure 1
*State Funding Sources
For Public Transportation*



COMMITTEE MEETING TITLE Special GPACT Worksession

DATE 9-28-87

| NAME | AFFILIATION |
|---------------------------------|---------------------------------|
| ✓ G- Andy Coppen | Metro |
| ✓ M- RICHARD WAKER | METRO |
| ✓ M- Pauline Andersore | Mult. Co. |
| ✓ M- Marjorie M Schmuck | Cities of Mult. Co. |
| ✓ M- LLOYD ANDERSON | PORT OF PORTLAND |
| ✓ M- Bob Rothman | ODOT |
| ✓ G- Mike Allen | ODOT |
| M- Tom Bian | Metro |
| M- Tom Bian | cities of Wash. Co. (Tugard) |
| E- Loren Wynn | TRIMET |
| M- George Van Bergen | Tri Met |
| M- George Van Bergen | Metro |
| M- Carl Blumhagen | Portland |
| M- Ed Reed Spind | Clackamas Co. |
| M- Ron Thom | Cities of Clack. Co. |
| EO- Vera Aron | Metro Exec. |
| ✓ G- Ramsey Witt | Mult Ct, Cammie Casterline |
| G- Jim Gardner | Metro |
| ✓ G- Howard Hester | PER |
| ✓ G- Bob Stuenkel | Portland 1000 Friends of Oregon |
| ✓ S- Jim B. Collins | Metro |
| ✓ S- JAMES GREGG WING | METRO |
| ✓ G- RICHARD N. ROSS | TRAC-CITIES OF MULT. Co. |

COMMITTEE MEETING TITLE Special JPACT

DATE 9-28-87

| NAME | AFFILIATION |
|--|-----------------------------|
| ✓ S- John Cullerton | Metro |
| ✓ S- Susan Hopkins | Metro |
| Med. HARRY BOVINE | The OREGONIAN |
| G- Vic Rhodes | City of Portland |
| ✓ G- Dick Freerly | Tri Met |
| ✓ G- David Paese | Clackamas Co. |
| ✓ G- Rick Root | City of Beaverton |
| ✓ G- Frank Angelo | Washington County |
| ✓ G- Doug Allen | Citizens for Better Transit |
| G- MARTIN WINCH | MULT CNTY |
| ✓ G- Dan Seeman | IRC of Clark County |
| ✓ S- Keith Lanyon | Metro |
| ✓ G- Alonzo Wertz | Tri-Met |
| ✓ G- Pamela Dunham | Tri-Met |
| G- Wink Brooks | City of Hillsboro |
| Med. Robert Goldfield | Daily Journal of Commerce |
| ✓ G- Beanie Bottomley | Rep. Les AuCoin |
| G- STEPHEN IWAHA | Portland |
| (alias Grace Crumman) Eleanor Roosevelt | Pdx |
| ✓ G- Lee James | TRI-MET |
| ✓ G- Mike McKillip | City of Troutdale |
| ✓ G- Jimmy Moore | ODOT, Transit Div |
| ✓ G- Cherise McGinnis | Sen. Kennemer's Office |

COMMITTEE MEETING TITLE Special JPACT Worksession

DATE 9-28-87

NAME

AFFILIATION

✓G- Jerry Spannich
Clackamas County

✓G- Bill Condonox
STATE SENATE DISTRICT 12

✓G- Pat Levine
U.M.T.A.

✓G- DOUG CAPPS
TRI-MET

✓G- Rick Kuehn
O.D.O.T.

✓G- TOM VANDERZANDEN
Clackamas County

✓G- DAVE EVANS
TPAC ^{CITIZEN}

✓G- Ray Polani
C.B.T.

✓G- Bebe Rucker
Port of Portland

✓G- Dawn Swift
Port of Portland

✓G- Larry Nicholas
Multnomah Co.

✓G- GBARRINGTON
Tri-Met

✓S Richard BRANOMAN
Metro

✓G- Telsena
O.D.O.T.

✓G- RACE WARNER
WV. Co.