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Joint Policy Advisory Committee on Transportation

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METRO

2000 S.W. First Avenue
Portland, OR 97201-5398
503/221-1646

Agenda

Meeting: JOINT POLICY ADVISORY COMMITTEE ON TRANSPORTATION

Date: March 10, 1988

Day: Thursday

Time: 7:30 a.m.

Place: Metro, Council Chamber

- *A. MEETING REPORT OF FEBRUARY 11, 1988 - APPROVAL REQUESTED.
- *B. APPROVING FAU SYSTEM FUNDS IN PARTIAL SUPPORT OF OREGON'S TECHNOLOGY TRANSFER CENTER FOR TRANSPORTATION - APPROVAL REQUESTED - Andy Cotugno.
- C. STATUS REPORT ON STUDY OF EAST BANK FREEWAY OPTIONS - Jane Cease.
- *D. DRAFT FY 89 UNIFIED WORK PROGRAM:
 - a. METRO - Andy Cotugno
 - b. TRI-MET - Lee Hames

*Material enclosed.

NEXT JPACT MEETING: APRIL 14, 1988 - 7:30 A.M.

NOTE: Overflow parking is available at the City Center parking locations on the attached map, and may be validated at the meeting. Parking on Metro premises in any space other than those marked "Visitors" will result in towing of vehicle.

MEETING REPORT

DATE OF MEETING: February 11, 1988

GROUP/SUBJECT: Joint Policy Advisory Committee on Transportation (JPACT)

PERSONS ATTENDING: Members: Richard Waker, Earl Blumenauer, Bob Bothman, Pauline Anderson, Tom Brian, George Van Bergen, Marjorie Schmunk, Bonnie Hays, Ed Lindquist and Wade Byers

Guests: Frank Angelo and Bruce Warner, Washington County; Ted Spence and Lee LaFontaine, ODOT; Tom VanderZanden and Gary Spanovich, Clackamas County; Steve Dotterrer, City of Portland; Lee Hames, Tri-Met; Peter Fry, Citizen; Robert Rogers, Chamber of Commerce; Bebe Rucker, Port of Portland; Richard Ross, Cities of Multnomah County; and Susie Lahsene, Multnomah County

Staff: Andrew Cotugno, Bill Pettis, Karen Thackston, and Lois Kaplan, Secretary

MEDIA: Robert Goldfield, Daily Journal of Commerce

SUMMARY:

MEETING REPORT OF JANUARY 14, 1988

It was noted that the January 14 Meeting Report incorrectly stated that Wade Byers, Jr., the newest member of JPACT, was Mayor of Tigard. The minutes should be corrected to read Mayor of Gladstone. The Meeting Report was approved as amended.

Chairman Waker then welcomed Mayor Byers to his first JPACT meeting.

AMENDING THE FY 1988 UNIFIED WORK PROGRAM

Andy Cotugno explained that the purpose of the FY 88 UWP amendment was to reflect the federal funding cutback, the overall budget level and reprogramming of work elements. He noted that the basic emphasis of the work program remains the same.

Action Taken: It was moved and seconded to recommend approval of Resolution No. 88-861 amending the FY 1988 Unified Work Program. Motion CARRIED unanimously.

FY 89 UNIFIED WORK PROGRAM

Andy Cotugno indicated that the handout was an introduction to next year's Unified Work Program, encouraging the jurisdictions to review the proposed work tasks and submit comments. The draft UWP will be considered at the March 25 TPAC meeting.

Bob Bothman emphasized the need to use P.E. funds for Sunset Corridor related activities because of recent declines in federal planning funds.

Bob Bothman also pointed out the need in the Bi-State Study to link the third river crossing with light rail.

Commissioner Anderson asked for emphasis on the Banfield light-rail evaluation and an evaluation of transit ridership in general.

Commissioner Blumenauer requested that the following three agenda items be reviewed as a package and be voted on after reviewing all three items:

ALLOCATION OF FAU AND INTERSTATE TRANSFER FUNDS

Andy Cotugno explained that approval of this Resolution would begin implementation for allocation of FAU and Interstate Transfer funds relating to projects tabled by JPACT last August. A preliminary set of priorities have been laid out with general directions for pursuit of funds emanating from last fall's JPACT worksessions.

Andy then reviewed the Staff Report and Resolution. The recommendation is to proceed immediately to allocate the FY 86-88 FAU funds through a regional/county approach. Seventy-five percent would be allocated on a formula basis to each county and 25 percent on a regional basis. Follow-up action would be required to approve the projects with specific dollar amounts.

Andy noted the foremost issues: the allocation approach of FAU funds and what kinds of funds should be used as seed money for the preliminary engineering projects. The question of whether projects should be selected on the basis of their regional importance or whether local discretion should be provided for in the allocation of those funds was of primary concern.

ESTABLISHING THE REGION'S PRIORITY HIGHWAY PROJECT IMPROVEMENTS FOR INCLUSION IN THE 1989-1994 ODOT SIX-YEAR HIGHWAY PROGRAM

Andy Cotugno explained that staff and the TIP Subcommittee performed a technical ranking on all projects submitted for consideration of Six-Year Highway Program funding based upon criteria established during the JPACT worksessions. The emphasis of the criteria is that the highest priority should be placed on immediate and 10-year problems (traffic congestion and capacity deficiencies which limit the ability to develop a particular area). Other considerations included cost-effectiveness and the staging of the most critical segments on large projects.

JPACT

February 11, 1988

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The recommendations for the highway priority projects are for construction (where plausible within the six-year timeframe), preliminary engineering or right-of-way.

Andy indicated that some projects with lower rankings are recommended as high priority projects because of their relationship to other priority projects or because of other committed funding.

There is a concern about the status of the Sunset Highway, Andy noted, inasmuch as all of the region's major radial corridors are covered by either Interstate or Access Oregon funds -- with the exception of the Sunset Highway. Additional recommendations to ODOT are that they consider the establishment of an Operations Fund and some freeway management programs.

Bob Bothman, Director of ODOT, expressed his appreciation for the evaluation given to the projects but cautioned the region not to have high expectations due to the lack of funds. The state is currently over-programmed by \$240 million in the Six-Year Program. They've been able to maintain their current priorities although they are dealing with a \$40 million/year loss. He spoke of keeping on line with the three or four major regional projects. In the next 20-25 years, Oregon's growth is anticipated to increase by one million people. He spoke of the challenge to meet the travel demand associated with that growth.

Commissioner Blumenauer cited the fact that the state is currently spending a lot of money on economic development and noted the aggressive political process in place in other parts of the state. He felt this may help justify the need for increased gas taxes for the next legislative session. He further supported going forward with the overall package and the compelling need to see that the Oregon Comeback, which in large measure is occurring in the metropolitan area, is adequately served.

Bob Bothman was questioned as to the state's method for evaluating projects for inclusion in the Six-Year Program update and whether the evaluation consisted of a similar ranking process as was performed regionally. He indicated that projects are looked at from a statewide perspective and consider factors such as highway congestion, accidents, trucks and safety.

TRANSIT FUNDING

Resolution No. 87-833, approved by JPACT on December 22, 1987, endorsed Tri-Met's five-year Transit Development Plan. To accommodate its \$14.5 funding shortfall, staff recommends that the TIP Subcommittee give consideration to the question of how to fully fund the TIP. Andy then reviewed the specific steps outlined in the memo to JPACT, citing the importance of keeping the buses maintained and on the road.

Commissioner Hays and Mayor Brian concurred on the need for later review of the projects and an annual evaluation of the Transit Development Plan.

With regard to clause #5, Bob Bothman cautioned that we should be looking at what brings the most money to the region.

Actions Taken:

- . It was moved and seconded to recommend approval of Resolution No. 88-859 to begin implementation of allocation of FAU and Interstate Transfer funds. Motion CARRIED unanimously.
- . It was moved and seconded to recommend approval of Resolution No. 88-860 for establishing the region's priority highway project improvements for inclusion in the 1989-1994 ODOT Six-Year Highway Program. Motion CARRIED.
- . It was moved and seconded to refer the transit funding issue for consideration by the TIP Subcommittee. Motion CARRIED.

REGIONAL TRANSPORTATION FUNDING PROPOSALS

Andy Cotugno reviewed the "Regional Transportation Funding" paper that is a package to implement JPACT's 10-year set of transportation priorities. The four major areas emphasized include: regional highway corridors; regional transit corridors (LRT); urban arterials; and expanded transit service.

Andy indicated that the JPACT Finance Committee is still trying to gain consensus on the funding program. He noted that progress reports will periodically be provided JPACT.

The next scheduled JPACT Finance Committee meeting is set for February 22 at 3:00 p.m.

ADJOURNMENT

There being no further business, the meeting was adjourned.

REPORT WRITTEN BY: Lois Kaplan

COPIES TO: Rena Cusma
 Dick Engstrom
 JPACT Members

STAFF REPORT

Agenda Item No. _____

Meeting Date _____

CONSIDERATION OF RESOLUTION NO. 88-____ FOR THE
PURPOSE OF APPROVING USE OF FEDERAL-AID URBAN
SYSTEM FUNDS IN PARTIAL SUPPORT OF OREGON'S
TECHNOLOGY TRANSFER CENTER FOR TRANSPORTATION

Date: February 18, 1988

Presented by: A. Cotugno

FACTUAL BACKGROUND AND ANALYSIS

Proposed Action

Adopt the Resolution approving \$20,122 of Federal-Aid Urban (FAU) funds as the Portland urbanized area's contribution toward Oregon's Technology Transfer Center for Transportation. This amount is to be drawn from the following sources:

FAU Regional Reserve	\$11,445
City of Portland	8,677
Total	<u>\$20,122</u>

TPAC has reviewed this action and recommends approval of Resolution No. 88-_____.

Background

The Center was established in September 1984 for the purpose of assisting local governments in improving their transportation programs. The funding for the Center has been provided from a combination of state and federal sources which will come to an end on June 30, 1988.

A strategy to continue operating the Center for an additional 18 months has been developed. The strategy calls for financing the Center from federal highway funds, and contributions from Oregon cities and counties. Metro and other MPO's in the state have been asked to contribute by way of releasing Federal-Aid Urban funds for use by the Center.

Attachment A has been included and provides a detailed description of the Center's function, the strategy for financing its continued operations, and the amount requested from the state's small urban areas and MPO's. Metro's contribution of \$20,122 is 53.6 percent of the \$37,500 requested; it is a direct ratio of our urbanized area allocation and the state's total urban apportionment.

EXECUTIVE OFFICER'S RECOMMENDATION

The Executive Officer recommends approval of Resolution
No. 88-_____.

AC/sm
9060C/531
02/28/88



League of Oregon Cities

SALEM: Local Government Center, 1201 Court Street N.E., P.O. Box 928, Salem 97308, Telephone: (503) 588-6550 • Toll Free in Oregon 1-800-452-0338

TO: City Managers/Recorders

FROM: B.J. Smith, Senior Staff Associate *BT*

SUBJECT: Oregon's Technology Transfer Center for Transportation; Use of FAU Funds

DATE: January 15, 1988

In September 1984, Oregon established a Technology Transfer Center (T2 Center) that would directly assist local governments in improving their transportation programs; the initial financing for the Oregon T2 Center was provided by the Federal Highway Administration and the Oregon Department of Transportation. The combination of federal and state financing that established the Center will end on June 30, 1988, causing the Center to close, unless a workable financial plan is designed to continue its operation. The six-member T2 Steering Committee, comprised of representatives from three cities, two counties, and the Indian tribes, requested that the League of Oregon Cities and the Association of Counties approve withdrawals of federal aid urban and federal aid secondary funds to help continue the Center. The League's Board will consider that request at their January 29 meeting; this correspondence requests your comments on the withdrawal.

Before moving to the financing strategy, the Center's activities should be described. The Center's focus has generally been to assist city and county transportation workers, technicians and first line supervisors. The Center provides many low-cost seminars and workshops annually, at varied locations; publishes a quarterly newsletter, "Oregon Roads," filled with technology inquiries, responses and articles; provides a "circuit rider" service, taking video equipment and tapes to communities; offers a lending library of audio/visual programs; and locates technical reports and explains the application of various technologies. The T2 personnel include a Director, who is the Materials and Research Engineer for ODOT, a Program Coordinator, and an Office Manager. T2 training is often contracted with universities or other technology specialists. The Center's usage by local government personnel, as is the case with T2 operations in other states, is largely a function of the time it has been in existence and has made itself "known" to public workers in the transportation field. Although it is only three years old, the Center's statistics show that many cities have become aware of it. For the period September 1985 to April 1987, the Center provided over 4,400 workshop training hours, loaned 135 A/V programs, made 182 circuit rider contacts, and satisfied 19 information requests. The research library and the newsletter distribution are growing. It is also significant that although the T2 Centers were authorized by the Rural Technical Assistance Act, the usage of T2 in Oregon, particularly for workshops, is high among cities such as Albany, Bend, Corvallis, Eugene, Grants Pass, Medford, Salem and La Grande. However, we have discussed the need for continued improvement in identifying T2 services for individual cities.

City Managers/Recorders

January 15, 1988

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The financing strategy proposed by the T2 Steering Committee, for the eighteen-month period July 1, 1988, through December 31, 1989, would support an operating budget of \$300,000:

Federal Highway Administration	\$150,000
Association of Counties	\$112,500
League of Oregon Cities and major urban cities (through Metropolitan Service District, and Eugene, Salem, and Medford MPOs)	<u>\$ 37,500</u>
TOTAL	\$300,000

The proposal would, in essence, fund the T2 Center directly off the top of the federal aid transportation fund to cities. On behalf of cities under 5000 population, who do not receive direct federal aid allotments, the Association of Oregon Counties agreed to increase their share of match. At this time, the financing strategy needs the approval of the League and approval of cities' metropolitan planning organizations.

To help you evaluate the proposed withdrawal of FAU funds from your city's allotment, a table of estimated costs is attached. The table is predicated on the assumption that all cities participate. The figures are estimates; the actual costs may vary slightly.

To ensure that your comments are considered on whether a withdrawal of FAU funds is appropriate, please return the enclosed post card by January 26th.

I encourage you to discuss the T2 program with your public works staff. Please feel free to contact me for further information, or any one of the T2 Steering Committee city representatives: John Joyce, Albany, at 967-4300, Russ Faust, Monmouth, at 838-0722; or Stan Stevenson, Redmond, at 548-2148.

BJS:ale
Enclosures

ATTACHMENT

STATE FAU ALLOCATION

<u>Area</u>	<u>Proposed Withdrawal</u>		
	<u>1 year - FY 88-89</u>	<u>6 months FY 89-90</u>	<u>18 months TOTAL</u>
Portland Urbanized Area	13,415	6,707	20,122
Portland			
Balance of Portland Urbanized Area			
Eugene Urban Area	2,733	1,367	4,100
Medford Urban Area	786	393	1,179
Salem Urban Area	2,033	1,017	3,050
32 Small Urban Areas plus Rainier*	<u>6,033</u>	<u>3,016</u>	<u>9,049</u>
	25,000	12,500	37,500

Notes:

1. These calculations are based on an annual withdrawal of FAU funds "off the top" of the allocation. The funding proposal for T2 is for 18 months' operation. For simplification, the estimates below are in annual terms. Most likely, one withdrawal for 18 months would occur from the 1988 FAU allocation to cover the entire period.
2. The proposed annual cost of contributing to T2 is about \$.0035 for each dollar of FAU funds allocated to an area.
3. These small urban areas include Albany, Ashland, Astoria, Baker, Bend, Canby, Coos Bay, Corvallis, Cottage Grove, Dallas, Grants Pass, Hermiston, Klamath Falls, La Grande, Lebanon, Lincoln City, McMinnville, Milton-Freewater, Monmouth, Newberg, Newport, Ontario, Pendleton, Prineville, Rainier, Redmond, Roseburg, Seaside, Silverton, St. Helens, Sweet Home, The Dalles, and Woodburn.
4. The annual share of an individual city's contribution can be evaluated several ways. If the FAU withdrawal is decided, it is proposed that the small urban areas pay proportionately in accordance with the amount of FAU funds allocated for them. Under that option, all small urban area cities would pay less than \$150 a year, except for Ashland, Astoria, Bend, Grants Pass, La Grande, McMinnville, Newberg, Pendleton, Roseburg, The Dalles, and Woodburn, who would pay in the range of \$150-300/year; Albany and Coos Bay, who would pay between \$300-500; and Corvallis and Klamath Falls, who would pay \$500-600.

If you have questions or comments about the T2 financing proposal, please call B.J. Smith.

BEFORE THE COUNCIL OF THE
METROPOLITAN SERVICE DISTRICT

FOR THE PURPOSE OF APPROVING USE)	RESOLUTION NO. 88-
OF FEDERAL-AID URBAN SYSTEM FUNDS)	
IN PARTIAL SUPPORT OF OREGON'S)	Introduced by the Joint
TECHNOLOGY TRANSFER CENTER FOR)	Policy Advisory Committee
TRANSPORTATION)	on Transportation

WHEREAS, In 1984 Oregon established a Technology Center to assist local governments in improving their transportation programs; and

WHEREAS, The combination of federal and state financing which supported the Center over the years will end this June 1988; and

WHEREAS, A proposal to continue funding the Center calls for federal, county and city participation using Federal-Aid Urban funds; and

WHEREAS, The Portland urbanized area's share for an 18-month period of operations has been targeted at \$20,122 in accordance with Exhibit A; now, therefore,

BE IT RESOLVED,

1. That the Council of the Metropolitan Service District releases \$20,122 of Federal-Aid Urban (FAU) funds to the Center:

FAU Regional Reserve	\$11,445
City of Portland	<u>8,677</u>
Total	\$20,122

2. That the Council of the Metropolitan Service District finds these actions in accordance with the Regional Transportation

Plan and gives affirmative Intergovernmental Project Review approval.

ADOPTED by the Council of the Metropolitan Service District
this _____ day of _____, 1988.

Mike Ragsdale, Presiding Officer

AC/gl
9060C/531
02/19/88

EXHIBIT A

Proposed FAU Funding:
Oregon's Technology Transfer Center for Transportation

Portland	43.12%	\$ 8,677
Washington County }		
Clackamas County }	56.88%	11,445*
Multnomah County }		
	<hr/>	<hr/>
	100.0 %	\$20,122

*Draw from "Regional" reserve \$495,035 - \$11,445 =
\$483,590.

DRAFT

**REGIONAL TRANSPORTATION PLANNING
IN THE PORTLAND-VANCOUVER METROPOLITAN AREA**

FISCAL YEAR 1989 UNIFIED WORK PROGRAM

**METROPOLITAN SERVICE DISTRICT
TRI-COUNTY METROPOLITAN TRANSPORTATION DISTRICT
CLARK COUNTY INTERGOVERNMENTAL RESOURCE CENTER**

OREGON PORTION

I. A. REGIONAL TRANSPORTATION PLAN: UPDATE AND REFINEMENT

The adopted RTP provides the region with a comprehensive policy and investment blueprint for an effective long-range transportation system. To ensure that the RTP is up to date and reflective of current economic, demographic and growth trends, periodic amendments are necessary.

Program Objectives:

1. Develop and evaluate travel trends for 2010 and identify transit and highway improvements to be incorporated in the RTP.
2. Ensure consistency of the RTP with Oregon land use laws; coordinate RTP amendments with local jurisdiction public facility plans; review consistency between the RTP and local comprehensive plans; initiate local or regional amendments as needed; assist in completing the UGB periodic review relative to transportation system impacts; assist Washington County in evaluating consistency of the Western Bypass with land use requirements.
3. Provide support to Tri-Met in updating the Five-Year Transit Development Plan; define required RTP amendments accordingly.
4. Evaluate transportation funding options in conjunction with the JPACT Finance Committee; provide support to various business and neighborhood associations in reviewing transportation plans, priorities and funding options.
5. Refine information on RTP costs and revenues; develop a computerized data base of RTP project costs that is integrated with the TIP.

Products:

1. 1988 and 1989 RTP updates.
2. Computerized file of RTP project costs and revenues.

Expenses:

Metro: Personnel	\$162,571
M & S	8,000
TOTAL	<u>\$170,571</u>

Revenues:

88 PL/ODOT	\$ 25,000
ODOT	43,926
89 Sec. 8	54,000
88 Sec. 8	14,000
Metro Match	17,000
Metro	16,645
TOTAL	<u>\$170,571</u>

I. B. REGIONAL TRANSPORTATION PLAN: PRIVATIZATION

Program Objective:

Ensure private enterprise participation in the planning and provision of mass transit service.

Proposed Program

1. Ensure elements of Private Enterprise Policy adopted in FY 1988 are undertaken:
 - a. Tri-Met will undertake early consultation with private providers in plans involving new or restructured transit service.
 - b. Tri-Met will continue its examination of existing routes to determine if they can be more efficiently operated by private enterprise.
 - c. Tri-Met will describe how both new and restructured services will be evaluated to determine if they could be more effectively provided by private sector operators.
 - d. Metro will review these analyses and provide comments to TPAC and JPACT prior to adoption of the TIP.
2. Continue to seek opportunities to implement private sector transit service where currently possible (e.g., Macadam corridor, PTC corridor, owl service, etc.).
3. Work to reduce institutional barriers inhibiting the ability to contract service on a widespread basis.
4. Work to secure private sector investments in the transit system as recommended by the Public-Private Task Force and continue to encourage public-private partnerships consistent with local plans and UMTA policies.
5. Ensure that the private sector has been adequately involved in the development of transit projects included in the TIP.

Products:

1. Tri-Met report documenting:
 - a. the involvement of the private sector in the development of specific transit projects;

- b. a description of the proposals received and how they were evaluated;
 - c. a description of the impediments to holding service out for competition and the measures taken to address the impact of such impediments; and
 - d. a description and status of private sector complaints.
2. Metro certification that the region's privatization policy has been followed prior to the submittal of the TIP.

Expenses:

Revenues

Metro: Personnel	\$17,500	FY 88 Sec. 8 (08-0051)	\$14,000
		Metro Match	<u>3,500</u>
TOTAL	\$17,500	TOTAL	\$17,500

I. C. SUBURBAN TRANSIT PLAN

Program Objective:

Design a cost-effective suburban transit system that meets future suburban transit needs and eliminates service deficiencies.

Proposed Program:

1. Achieve a thorough understanding of the suburban transit market today.
2. Determine how well current service taps the various market segments.
3. Analyze potential suburban transit service delivery patterns and methods, including paratransit and contracting options.
4. Forecast future suburban travel and transit market.
5. Design a suburban transit system that meets future suburban transit needs and provides more cost-effective service than exists today.

Expenses:

Metro: Personnel	\$37,500
TOTAL	\$37,500

Revenues:

FY 89 Sec. 8	\$30,000
Metro Match	5,875
Tri-Met Match	1,625
TOTAL	<u>\$37,500</u>

I. D. PUBLIC-PRIVATE TASK FORCE OF FUTURE TRANSIT FINANCE

This study was begun in FY 1988 for the purpose of identifying innovative financial strategies to fund transportation projects, particularly transit. Recognizing the need to include the private sector in planning for the region's future transit needs, the Task Force was charged with developing private funding mechanisms for implementation of priority transit projects and review of public sector funding. Emphasis was to be placed on the 10-year priority program developed by JPACT.

Program Objectives:

1. Establish a public-private framework or model which can be used to maximize financial backing for regional transitway projects. This will be used as a framework to identify local government and private sector financial commitments to demonstrate a stable and dependable source to construct, maintain and operate the system. The goal will be to identify private funding sources which will contribute to a higher percentage of the capital costs. Detail work on each corridor will not be the focus. Instead, it will focus on establishing the benefits of the different components of the transit system and recommending appropriate private funding models.
2. Establish alternative concepts for suburban transit service. Examine alternative concepts with private sector participation in the delivery of transit service, including being the provider of transit service in suburban areas.
3. Establish mechanisms for public-private partnerships to be used to fund transit improvements. This will be used as a framework to identify and construct incremental transit improvements in the region, which are operationally feasible.

Products:

- *1. Overview of transportation system, plan, priorities, growth assumptions, costs and revenues.
- *2. Define framework and methodology for evaluating benefits of transit to state, region, local area and private sector.
- *3. Inventory and present financial models, their application and revenue potential.
- *4. Review system component in more detail including suburban service and cost and central city operations and cost.

5. Evaluate benefits of each transit corridor.
 6. Evaluate funding options relative to benefits for each corridor.
 7. Recommend funding options for capital and operating costs for each corridor.
- Merge costs and benefits of each corridor with a generalized assessment of the balance of the system.
8. Define institutional and legal barriers to implementing financial options.
 9. Final Task Force recommendations on public and private sector finance; delineate next steps for implementation.

Expenses:

Metro: Personnel	\$ 25,000
M & S	90,000
Portland: Personnel	10,000
TOTAL	<u>\$125,000</u>

Revenues:

FY 88 Sec. 8	\$ 80,000
OR-08-0054	
Portland Match	20,000
FY 89 Sec. 8	<u>20,000</u>
Metro Match	5,000
TOTAL	<u>\$125,000</u>

I. E. SOUTHEAST CORRIDOR STUDY

The adopted RTP recognized several outstanding transportation issues in the Southeast Corridor extending from the I-5/I-405 loop to U.S. 26 east of Boring. Begun in 1987, this study will identify, evaluate and define the effects of different transportation investments and policies in the Corridor to address specific issues, and, upon adoption by the Policy Committees after public hearings, recommend improvement strategies for inclusion in affected state, regional (RTP) and local plans.

Program Objectives:

1. Continue analysis of transportation alternatives to minimize excessive traffic impacts on Johnson Creek Boulevard between S.E. McLoughlin Boulevard and S.E. 45th in accordance with the following principles:
 - To identify methods to address the transportation needs of the area, particularly the east-west traffic pattern between I-205 and McLoughlin Boulevard;
 - To meet the needs of both existing and planned land use patterns;
 - To protect existing residential and environmentally sensitive areas;
 - To ensure problems existing in parts of the area are not simply transferred to other areas; and
 - To identify an acceptable truck routing pattern.

The study will address at a minimum the area bounded by Holgate, I-205, Highway 224 and the Willamette River.

2. Coordinate Southeast Study with ODOT's project development and preliminary engineering for the McLoughlin/224/212 Corridor from downtown Portland to U.S. 26 to ensure consistency between proposed improvements in that corridor with plans for serving subregional traffic problems in the Johnson Creek Corridor.
3. Develop improvement strategy to provide Willamette River capacity needs based on evaluation of the adequacy of the Sellwood and Ross Island Bridges for serving traffic demand. Ensure that the capacity of the surrounding highway system is consistent with any river crossing improvements and take into consideration recommendations for serving Highway 224/212 and Johnson Creek Corridor traffic. Consider the adequacy of existing bridges, options for upgrading or replacing existing bridges and new bridge location alternatives (ODOT and Multnomah County will be principally responsible for providing bridge project design and cost information).

4. Incorporate results of the analysis of a major transit service expansion in the study area, particularly as it impacts traffic problems in the Johnson Creek Corridor, the McLoughlin/224/212 Corridor, and across the Sellwood and Ross Island Bridges. Provide support to the Phase I Alternatives Analysis as it relates to transit investments between Milwaukie, Oregon City and Clackamas Town Center.
5. Complete and distribute reports documenting the analyses, evaluations, conclusions and recommendations of the Technical Advisory Committees on the preferred investment strategies and policies.
6. Staff citizen advisory committees, neighborhood meetings, public hearings and deliberations on recommended strategies and policies.
7. Develop final reports and transmit recommendations of the Policy Committees to affected state and local jurisdictions for inclusion in their plans.
8. Amend adopted RTP to include final recommendations of the study.

Products:

1. Preliminary staff reports and Final Reports documenting analysis, evaluation of alternatives and project recommendations.
2. Recommendation for inclusion in RTP and other pertinent state and local plans.

Expenses:

Metro:	Personnel	\$87,000
	M & S	
TOTAL		<u>\$87,000</u>

Revenues:

FY 89 Sec. 8	\$16,000
FY 89 (e) (4)	13,372
FY 87 (e) (4)	\$40,000
ODOT	4,208
Metro Match	7,146
ODOT Match	<u>6,274</u>
TOTAL	\$87,000

I. F. BI-STATE TRANSPORTATION STUDY

Program Objective:

Concern has been raised regarding future capacity deficiencies across the Columbia River between Portland and Clark County, Washington. In addition, several proposals have been suggested to address this deficiency, including a possible extension of the Westside Bypass north to I-5 in Clark County a possible new bridge in the vicinity of Troutdale and Camas and LRT in the I-5 Corridor to Vancouver. Metro, in cooperation with Oregon and Washington jurisdictions, will undertake a preliminary evaluation of 2010 travel demands and the issues to be addressed in a comprehensive study of possible alternatives.

Product:

Work plan for a comprehensive study to be undertaken including alternatives to be evaluated.

Expenses:

Metro: Personnel

\$15,000

TOTAL

Revenues:

FY 89 PL/ODOT

TOTAL

\$15,000

\$15,000

I. G. PHASE I ALTERNATIVES ANALYSIS

Program Objectives:

1. Complete the assessment of the remaining transitway corridors identified in the RTP for which a Phase I analysis has not yet been completed. These include:
a) Sunset LRT extensions; b) Milwaukie LRT extensions; and c) I-205 LRT extensions. On the Eastside, the feasibility of the following may be evaluated: a) Milwaukie to Oregon City via McLoughlin; b) Milwaukie to Lake Oswego; and c) Clackamas Town Center to Oregon City via I-205. On the Westside, the following may be evaluated: a) Beaverton to Tigard or Tualatin; b) Beyond 185th to central Hillsboro; and 3) Sunset Highway/Cornell Road to Hillsboro.
2. Identify alignments to be protected for corridors not included in "Priority LRT System" but desired to be retained for further consideration.
3. Complete downtown alignment and operations plan for four-corridor LRT system -- Banfield, Westside, McLoughlin and I-205.

Relation to Previous Work:

The Regional LRT System Plan Scope of Work (approved in FY 1983) has served as an overall guide for the Regional LRT studies, under which studies in the Milwaukie, Bi-State, I-205, Barbur and Macadam corridors have been undertaken. Prior to initiating further full Phase I studies for remaining transitway corridors identified in the RTP, a "sketch" assessment was performed to limit the full "Phase I" work program assessment to those corridors found to be most promising.

In the fall of 1987, JPACT evaluated the work which had been completed to that time and determined that the Westside, Milwaukie and I-205 corridors have the highest priority and should be advanced to construction in a 10-year time frame. The Barbur and I-5 corridors were determined to be a lesser priority and recommended to be constructed in a 20-year time frame. The Macadam Corridor need was determined to be beyond the 20-year time frame.

Products:

1. Alignment descriptions for those corridors not part of the priority system, but still considered feasible in the long term.

2. Downtown LRT report defining downtown operation needs for a four-corridor system and engineering issues associated with the Hawthorne Bridge and Yamhill Market areas.

Responsibilities:

Metro is responsible for the overall conduct of the study, coordination of the Oregon decisions, Oregon public involvement, technical analysis associated with travel forecasts, impact analysis and cost-effectiveness evaluation.

Tri-Met is responsible for definition of alternatives including engineering analysis, capital costing and operations costing.

Close coordination will take place with the City of Portland for work products in downtown Portland.

Portland, Clackamas County, Washington County, Multnomah County, ODOT and the Port of Portland will participate in the Technical Advisory Committee(s) and assist with public involvement as appropriate.

Expenses:

Metro:	Personnel	\$ 56,500
	M & S	48,000
TOTAL		\$104,500

Revenues:

FY 89 (e) (4)	\$ 50,575
FY 83 (e) (4) (09-9008)	\$ 20,000
FY 85 (e) (4) (09-9010)	25,000
Metro Match	8,925
TOTAL	\$104,500

II. A. DATA, GROWTH MONITORING AND FORECASTS

Regional Data Base Maintenance

Objectives:

1. Current and past data: update housing, population and employment data to 1987.
2. Forecasts: Forecasts will be produced for both the long-range (2010) and short-range (five-year) futures. This will be the conclusion of a major effort to produce a long-range forecast update every fifth year, involving representatives from both the public and private sector. In the years between the five-year updates, a minor extension of the long-range forecast to the next year is prepared. The forecasts will be to the geographic areas of region, county, and census tract, with estimates to traffic zone for transportation planning purposes. A 10- and 15-year future will be interpolated and a "buildout" analysis provided. Work that carries over into FY 1989 will include split subregional forecasts into small area zones and preparation of documentation.
3. G.I.S.: Install a computerized geographic information system with initial priority on updating vacant land that is designated for commercial or industrial use in local zoning or comprehensive plans. Future emphasis will shift to vacant residential lands and existing land uses in generalized categories. This activity will involve acquisition of necessary computer hardware and software.
4. Provide socio-economic data and forecasts to local jurisdictions within the following budgets:

Portland	\$12,996
Washington County	7,787
Clackamas County	5,575
Multnomah County	4,309
Port of Portland	3,833
Tri-Met	2,500
ODOT	2,500
TOTAL	<u>\$39,500</u>
5. Computer Replacement: Due to age and increasing maintenance cost, the current Pixel computer will be replaced with a new multi-user UNIX system.
6. Travel-to-Work Census: Develop file of employer locations to provide to the U.S. Census Bureau for geocoding survey responses to the 1990 travel-to-work census.

Relation to Previous Work:

A continuation of the annual work required to maintain a satisfactorily updated data base for both transportation and general planning.

Products:

Computer files and hardcopy of the following sets of information:

1. 1987 Updates by Traffic Zones

Persons - by age and sex
Households - by size and income
Dwelling Units - by type
Employees - by place of work by SIC

2. 2010 Forecasts by Traffic Zones

Persons - by age and sex
Households - by size
Dwelling Units - by type
Employees - by place of work by retail/non-retail

3. A 5, 10 and 15-year interpolation and a "buildout" estimate of the data in 2 (above) will be compiled for the staging analysis, the five-year TDP, the regional 10-year priority program and for the 15-year horizon required for LRT studies.
4. Geographic Information System data base defining vacant commercial and industrial land by traffic zone, census tract, city and county.
5. Computerized file of employer locations by census tract and traffic zone for the 1990 travel-to-work census.
6. 1987 base maps.
7. Monthly building permit reports, quarterly development trends reports and annual regional fact book.

Expenses:

Metro: Personnel	\$272,423
M & S	25,260
TOTAL	<u>\$297,683</u>

Revenues:

FY 89 PL/ODOT	\$ 45,700
FY 89 Sec. 9	60,000
FY 89 (e) (4)	45,647
FY 89 Sec. 9	2,000
ODOT	2,500
Metro	141,336
Tri-Met Match	500
TOTAL	<u>\$297,683</u>

II. B. TRAVEL MODEL REFINEMENT

Objectives:

1. Maintain an up-to-date travel-forecasting model based on project changes, land use changes, and projected transit and highway investments.
2. Continue to improve and refine the travel-forecasting models, as appropriate, to enhance the decision-making process served by the model outputs.

Relation to Previous Work:

This is a continuing process to improve travel modeling and forecasting for this region. The major effort in FY 87 is to revise the mode split model and refine the level of detail for traffic forecasts.

Products:

1. Results of the 1988 travel behavior surveys will be published in a report.
2. Particular effort will be placed on development of an integrated route patronage model for Tri-Met and on improved modeling of park-and-ride demand.
3. A literature search of modeling techniques and improved method of forecasting "commercial" traffic.
4. Updated transit mode split model to incorporate LRT bias.
5. Documentation of updated models to include model description, changes from previous models, description of input variables and model co-efficient, documentation of calibration to transit ridership and traffic count data and evaluation of sensitivity to variations of input variables (to be completed suitable for Westside LRT Preliminary Engineering).
6. Revisions in models as necessary to more accurately reflect suburban transit demands.
7. Standardization of traffic count methodology used by ODOT, cities and counties and publications of regional count data.

Expenses:

Metro:	Personnel	\$145,517
	M & S	17,000
TOTAL		<u>\$162,517</u>

Revenues:

FY 89 PL/ODOT	\$ 16,267
FY 89 ODOT Direct	47,500
FY 89 Sec. 9	75,000
Tri-Met Match	9,375
Metro	<u>14,375</u>
TOTAL	<u>\$162,517</u>

II. C. TECHNICAL ASSISTANCE

Program Objective:

Provide travel analysis and forecasts as needed by local agencies and jurisdictions.

Relation to Previous Work:

This is an ongoing service which has been provided to member jurisdictions on a request basis.

Products:

1. Metro assistance for
 - Staff Assistance to obtain data and forecasts and/or evaluate a particular transportation problem
 - Computer Usage
 - Training
2. Technical Assistance to the jurisdictions will be based on a budget allocation as follows:

Portland	\$23,800
Multnomah County	32,900
Washington County	39,250
Clackamas County	35,175
Port of Portland	7,000
Tri-Met	15,000
ODOT	17,500
	<u>\$170,625</u>

Requests for services must be made by the appropriate TPAC members; suburban jurisdictions should channel their request through the TPAC representative in the cities of that county. Includes increased budget of \$25,000 for each of these counties through a special grant.

3. Provide support to Sunset Highway and LRT preliminary engineering efforts to include:
 - a. Assistance to Tri-Met to refine transit operating characteristics for input to Sunset LRT ridership forecast.
 - b. Assistance to ODOT to refine Sunset Highway traffic forecasts consistent with design characteristics of proposed highway improvements.
 - c. Assistance to Portland and Washington County to identify improvements required to Cornell Road and

Barnes/Burnside consistent with proposed Sunset
Highway and LRT improvements.

Proposed Budget: \$35,000

Expenses:

Metro: Personnel	\$191,225
M & S	30,500
TOTAL	<u>\$221,725</u>

Revenues:

FY 89 PL/ODOT	\$ 71,125
FY 88 Sec. 9	20,000
ODOT TA Expansion	16,100
89 TA Exp.	75,000
Tri-Met Match	5,000
Metro	7,000
ODOT	<u>27,500</u>
TOTAL	<u>\$221,725</u>

II. D. WESTSIDE LRT PRELIMINARY ENGINEERING

Program Objectives:

Tri-Met is the lead agency for Westside LRT Preliminary Engineering. Metro will provide input data and reports required for submission to UMTA for the Final EIS and cost-effectiveness ranking.

Products:

1. Travel-forecasting methodology report documenting transit and highway network assumptions, gas price, parking cost, auto operating cost, transit fares and description of key comparative data for the alternatives regarding travel times and accessibility.
2. Publication of "Preliminary," "Draft" and "Final" ridership forecasts for the following scenarios:
 - a. 1987 transit and highway system;
 - b. 2005 No-Build transit and highway system;
 - c. 2005 transit TSM plus proposed highway improvements;
 - d. 2005 Sunset LRT plus proposed highway improvements; and
 - e. various sensitivity forecasts such as 1987 travel on proposed LRT and highway improvements, 2005 travel on LRT without highway improvements, 2005 travel on proposed Sunset Highway improvements without LRT.
3. Publication of indicators required for cost-effective ranking such as induced ridership, travel time savings, etc.
4. Input to Tri-Met as needed to evaluate ridership impact of alignment alternatives such as tunnel versus at-grade alignment and Tualatin Valley Highway versus Burlington Northern alignment.

Relationship to Other Work:

1. The Data, Growth Monitoring and Forecasting work element will provide 2005 population and employment forecasts and methodology for development.
2. The Model Refinement work element will provide updated models and their documentation.
3. The Suburban Transit Study will provide a revised Washington County service plan for input to LRT ridership forecasts.
4. The Technical Assistance work element will provide assistance for highway and transit system refinements in the Sunset Corridor and in parallel routes.

Expenses:

Metro: Personnel	\$32,000
M & S	<u>3,000</u>
TOTAL	\$35,000

Revenues:

TOTAL	\$35,000
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II. E. BANFIELD AFTER ASSESSMENT

Program Objectives:

1. Determine and document the impacts of both the LRT and the Banfield Freeway improvements on existing highway and transit travel in the Banfield corridor.
2. Determine and document mode-specific changes in travel behavior that can be attributed to light rail.
3. Update the travel models to reflect travel behavior evidenced in the travel behavior surveys carried out as a part of this project (discussed in detail under model refinement).

Relation to Previous Work:

This project will enable the region to obtain a fuller understanding of the impacts of the Banfield LRT which is invaluable in defining LRT benefits as well as in helping produce more accurate travel forecasts in other rail corridors.

This report will build on the analysis completed and documented in two reports:

1. "The Banfield Assessment Program -- Travel Conditions Before Light Rail," Metro, December 1987; and
2. "Development Impacts of the Banfield Light Rail," Tri-Met, March 1987.

Products:

1. Complete compilation of 'after' data for development of the before-and-after analysis; this includes:
 - An on-board origin-destination passenger travel survey -- spring of 1988, to be conducted by Tri-Met (see Tri-Met section).
 - A household travel behavior survey -- spring of 1988, Tri-Met (Banfield corridor only).
 - Tri-Met ridership census/counts (see Tri-Met section).
 - Corridor traffic counts, spring 1988 (ODOT).
 - Corridor aerial photographs, 1988 (ODOT).

It is important that the details of both the content and the conduct of the above data-gathering activities

be coordinated by Metro staff to ensure that there is a sufficiency for the analyses.

2. A Banfield corridor 'Before-and-After' report, documenting both travel conditions (highway and transit counts and travel patterns) and travel behaviors, (before, after and changes). This document will also contain an analysis and evaluation. It is also intended that this report should address economic development impacts of the LRT.
3. The addition of travel behavior changes attributable to LRT to the regional travel models.

Responsibilities:

Metro will provide overall project coordination and compile and produce a Banfield "Before-and-After" report.

Expenses:

Metro: Personnel	\$20,000
M & S	5,000
TOTAL	\$25,000

Revenues:

FY 89 Sec. 9	\$20,000
Metro Match	2,500
Tri-Met Match	2,500
TOTAL	\$25,000

III. A. TRANSPORTATION IMPROVEMENT PROGRAM

The TIP is a federally required document setting forth funding for transportation improvements identified in the RTP, including project length, termini, estimated total costs, federal funds to be obligated by program year, identification of recipient and state and local agencies responsible for carrying out the project.

Program Objectives:

1. Allocate available federal funding for the program year by establishing project priorities and individual jurisdiction budgets. Included will be the incorporation of ODOT's Six-Year Highway Improvement Program and development of the FAU funding program.
2. Monitor funding status of applicable federal funds including project authorizations and obligations. Major emphasis will be placed on Interstate Transfer funds (highway and transit), Urban Mass Transportation Administration (UMTA) grants and Federal-Aid Urban funds. Maintain overall status of the above by clear distinction of: UMTA (e)(4) grants broken into Banfield and all other; highway and transit by jurisdiction; and UMTA grants set forth under the UMTA Act.
3. Adopt the FY 1988 TIP Annual Element update including the assessment of air quality conformity and compliance with UMTA requirements for involvement of the private sector (October 1985).
4. Publish monthly and quarterly TIP updates.
5. Provide generalized support to state and local jurisdictions on information on project funding and obligations.

Relation to Previous Work:

TIP updates and ongoing project priority setting.

Product:

1. FY 1989 TIP with "certification" that federal requirements are being met and UMTA privatization requirements are being met.

Expenses:

Metro: Personnel	\$115,000
M & S	5,000
TOTAL	<u>\$120,000</u>

Revenues:

FY 89 PL/ODOT	\$ 31,908
FY 89 Sec. 8	60,000
FY 89 (e)(4)	13,092
Tri-Met Match	5,000
ODOT Match	5,000
Metro Match	5,000
TOTAL	<u>\$120,000</u>

III. B. COORDINATION AND MANAGEMENT

Program Objectives:

1. Internal management of the Transportation Department toward implementation of the Unified Work Program (UWP).
2. Provide support to various Metro committees; coordinate with ODOT, Tri-Met and local jurisdictions.
3. Provide documentation to Federal Highway Administration (FHWA) and UMTA of departmental activities, including Intergovernmental Project Review, monthly and quarterly progress reports.
4. Provide for staff development through performance evaluations and training.

Relation to Previous Work:

This work element is ongoing and carries over each year.

Products:

1. FY 1989 Unified Work Program.
2. Execution and monitoring of various pass-through agreements.
3. Required documentation to FHWA and UMTA.
4. Monthly progress reports to the TPAC.
5. Quarterly progress and financial reports to UMTA and ODOT.
6. Minutes, agendas and documentation.
7. Management of department staff time, budget and products.
8. Interdepartmental coordination.
9. Periodic review with FHWA and UMTA on UWP progress.

Expenses:

Metro:	Personnel	\$113,500
	M & S	9,000
TOTAL		\$122,500

Revenues:

FY 89 PL/ODOT	\$ 30,000
FY 89 Sec. 8	14,000
FY 89 (e) (4)	40,406
Metro Match	38,094
TOTAL	\$122,500

III. C. ODOT PLANNING ASSISTANCE

Program Objectives:

Major accomplishments for FY 1989 by the Metro/Region Branch include supporting Metro and other agencies in the RTP update. Major assistance emphasis will also be given to the local plan updates and Southeast Corridor Study. Work activities will include:

FY 1989 HPR PROGRAM

1. Access Management Study support (Beaverton).
2. Eastside Plan Update.
3. Traffic count updates as needed for model refinement, subarea studies and the Banfield Before-and-After study.
4. Local land use development and traffic impact reviews.
5. Participate in other subarea analyses such as Tigard, South Waterfront and East County subareas.
6. Transit station and park-and-ride developmental reviews.
7. Small city transportation analysis (Milwaukie, West Lynn, Forest Grove).
8. Continue state/City of Portland highway jurisdictional study.
9. Policy and technical coordination with regional planning, local agencies, TPAC, the Joint Policy Advisory Committee on Transportation (JPACT), State of Washington regional planning (Regional Resource Center), Washington County Transportation Coordinating Committee (WCTCC), Clackamas County Transportation Committee, East Multnomah Transportation Committee and coordination of administration of programs with Metro.
10. Participate in the Regional Bi-State Transportation Analysis, Sunset Highway Analysis, I-205 LRT, Regional LRT Study, Forecast Updates, Banfield After Study.

Expenses:

ODOT: Personnel	\$168,100
M & S	11,000
TOTAL	<u>\$179,100</u>

Revenues:

HPR/ODOT	\$179,100
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I. EFFICIENCY PLANNING

A. Transit Performance Analysis

Program Objectives:

1. Development of quarterly performance reports.
2. Comprehensive peer group review that includes both bus and rail systems.
3. Continued quarterly analysis of route performance and the effects of service and fare changes on ridership.
4. Operator productivity analysis, including analysis of operator attendance, extraboard.
5. Ridership estimation, including a ridership survey of fare payment, analysis of fare survey, and continued refinement of light rail ridership estimation model.
6. Continued analysis of Tri-Met systemwide performance.

Relation to Previous Work:

1. Tri-Met's monthly performance reports provide data and performance measures for both the bus and light rail system, and serve ongoing agency efforts to improve productivity. Next steps are to provide a more thorough analysis of Tri-Met's performance through quarterly performance reporting.
2. Tri-Met has not conducted a peer group comparison of performance indicators for several years. It is important that we re-establish this effort, and also develop a new peer group that includes light rail properties. Recent peer group analysis of fare systems, attendance programs and agency budgets have proven useful to management.

Products:

1. Quarterly Performance Analysis Reports.
2. Peer Group Analysis.
3. Two or three reports annually on bus route performance.
4. Analysis of operator productivity, incentive programs, labor issues.

5. Accurate ridership estimation.
6. Ridership analysis from fare survey results.

Expenditures:

Tri-Met \$87,400

Revenues:

OR-90-2019	45,920
FY89 Sec. 9	24,000
Tri-Met	<u>17,480</u>
	\$87,400

I. EFFICIENCY PLANNING

B. Transit Service Evaluation Program (TSEP)

Program Objectives:

1. Develop new technical methods to improve schedule writing processes and efficiencies.
2. Study and assess feasibility of new technologies applicable to improving schedule reliability of lines.
3. Develop and implement refined service standards applied towards improving ridership productivity.
4. Develop and implement structured coordination process to provide improved awareness of TSEP.

Relation to Previous Work:

This effort continues and expands upon the work accomplished to date. In the area of new schedule writing technical tools, the Interactive Schedule Maker (ISM) project is progressing into final design phase. The ISM should become available, in prototypical form, to Schedule Writers towards the end of FY88. During the course of FY89 system implementation, user training and final modifications/refinements will occur.

In the area of new technologies for improving schedule reliability, (1) work will continue on adapting existing automatic passenger counting technology to provide on-time performance information, and (2) various potential automatic vehicle locating/monitoring technologies will be researched and evaluated. For FY89 this task will build upon preliminary investigative work already conducted. As part of this task it is anticipated that there may be some moderate consulting and materials expenditures, representing initial on-site small-scale testing of various technologies.

The areas of refined service standards and structured coordination have been identified as priority work tasks for the second half of FY88 and beyond.

Products:

1. Interactive Schedule Maker (ISM). (Computerized tool to assist schedule writers.)
2. Feasibility study, including cost/benefit analysis, regarding applicability and compatibility of Automatic Vehicle Location/Schedule Reliability System.

3. Coordinated TSEP process, including adopted service standards element, market research element, and financial impact element.

Expenditures:

Tri-Met \$145,000

Revenues:

OR-90-2017	\$15,000
FY89 Sec. 9	101,000
Tri-Met	<u>29,000</u>
	\$145,000

I. EFFICIENCY PLANNING

C. Automated Customer Contact Report System

Program Objectives:

1. Plan a database operating file of Tri-Met service that can be correlated to customer contact reports and field observations of daily service.
2. Plan an administrative process for identifying service problems and needs by using the database, establishing priorities for addressing the problems, and a procedure for timely resolution of the issues and response to internal and external audiences including customers and the general public.
3. Plan an administrative process and communication program that involves consumers and employees directly in quality assurance endeavors and trouble-shooting.
4. Plan a quality improvement program focusing on customer relations by front line employees.

Relations to Previous Work:

The Automated Customer Contact Report System will be substantially completed by July, 1988. Only the consulting services necessary for completion of the employee involvement element will carry over into FY'89.

Products:

1. An administrative process which will result in improved quality of service to the user of the system as well as improved response time to customers and management staff seeking information from the system.
2. Database operating profile of Tri-Met service quality with information from Customer Contact Reports, employee field observations, and daily service reports.
3. A plan for increased productivity in transit service and personnel through automation of daily service reports and field observations.
4. A quality improvement program through greater utilization of Tri-Met employees, especially front line employees in achieving quality assurance and customer satisfaction.

Expenditures:

Tri-Met \$20,000

Revenues:

OR-90-2019	\$16,000
Tri-Met Match	<u>4,000</u>
	\$20,000

I. EFFICIENCY PLANNING

D. Labor Productivity Analyses

Program Objectives:

1. Analyze the impacts that incentive programs, family-oriented programs, and workers' compensation programs have on improving labor productivity.
2. Assess employees' needs regarding health/wellness programs, family-oriented services, and safety and training.
3. Conduct research, including peer group comparisons, of absenteeism/attendance programs, incentive programs, and workers' compensation cost control efforts.
4. Develop statistical cost/benefit studies that include recommended courses of action, specific areas identified as priority improvement areas, and implementation strategies.
5. Study impacts of labor agreement, casual and negotiated absence on MAX extraboard use and size.

Relation to Previous Work:

This effort continues and expands upon the work accomplished to date. The overall study is divided into five separate work elements:

(1) Family-oriented issues: for FY88, this element includes the administration of an employee needs survey, analysis of survey results, and development of recommended strategies presented to executive management. While it is anticipated that the majority of this element will be completed by the end of FY88, there will still be some carryover activity in the first quarter of FY89.

(2) Workers' compensation computerized analysis: This element includes using computerized micro-to-mainframe software systems to access our workers' comp data, thus permitting diagnostic, historical analyses. During the first half of FY88, activity on this element has been delayed due to technical and contractual uncertainties. The effort will intensify during the second half of FY88, but will necessitate a moderate carryover into FY89 in order to complete the project.

(3) Health/safety incentive issues: This element has progressed well during FY88 with a good amount of information researched and obtained. Studying the feasibility of

expanding our current attendance incentive program to include safety and/or health/wellness categories requires obtaining appropriate legal guidance and opinion, relative to any incentive program conforming to Bureau of Labor and Industry regulations. The additional time needed to deal with the associated legal ramifications requires that this element be carried forward into FY89.

(4) Operator productivity analysis: This work element (which includes researching other transit systems' operator attendance/discipline, incentive and reward programs, as well as Tri-Met's own historical operator productivity patterns) is also progressing well and should be substantially completed by the end of FY88. The work program for FY89 will entail implementation of the results of the productivity standards developed, as well as a monitoring/refinement iteration process.

(5) Operators' lumbar supports study: While this specific study is a new work element for FY89, it's need materialized from the overall health/wellness study component. The project includes (a) setting up an environment whereby a set of operators test various lumbar support products, (b) researching the effectiveness of various lumbar supports, and (c) documenting short and long-term results of lumbar support usage by operators.

Products:

1. Statistical database profile and diagnostic analyses of workers' compensation claims patterns and tendencies that can be used by administrators.
2. Assessment of employees' needs and perceptions regarding family-oriented services, safety and training, and incentive programs.
3. Peer group based analysis of incentive programs, reward mechanisms and attendance/discipline efforts.
4. A structured mechanism to effectively evaluate the usefulness of lumbar supports and identify the most effective products.
5. Comprehensive reports for each task element that include costs/benefits, recommendations, specific areas targeted for improvement and implementation strategies.
6. Report documenting present MAX extraboard practices and recommended action plan detailing optimum use and size.

Expenditures:

Tri-Met \$65,800

Revenues:

OR-90-2019	\$35,200
FY89 Sec. 9	17,440
Tri-Met	<u>13,160</u>
	\$65,800

II. INFORMATION SYSTEMS PLANNING

A. Management Information and Control Planning

Program Objectives:

1. Continue planning a computer applications portfolio that captures information needed to manage and make decisions. Emphasis is placed on applications that support strategic plans of the agency, that avoid or reduce costs, and that contribute to more efficient operations.
2. Implement selected computer applications that are cost effective and that give management the control necessary to adjust activities in specific areas to meet goals.

Relation to Previous Work:

Because of staffing limitations only a small number of computer applications can be identified and planned for implementation each year. Previous technical studies have facilitated the development of new computerized applications such as the Liability Tracking System, Fare Inspection System, Ticket and Pass Invoicing System, and Incentive Tracking System.

This project addresses the need to develop several new computer applications in addition to those developed earlier. These applications are in the area of ticket vending machine sales, light duty tracking, and accounting.

Products:

Review of the computer application portfolio.

Needs assessment, functional specifications, and programming specifications for applications selected for development. Specific applications will be evaluated and selected based upon identified needs.

Expenditures:

Tri-Met: \$83,000

Revenues:

OR-90-2019	\$20,000
FY89 Sec. 9	46,400
Tri-Met	<u>16,600</u>
	\$83,000

II. INFORMATION SYSTEMS PLANNING

B. Financial/Economic Forecasting & Planning

Program Objectives:

1. Support policy analysis by providing management with financial projections of policy alternatives. Policy areas supported would be: budget planning, five year financial forecast, additional revenue planning, labor cost projections, fare analysis and planning, long-range financial planning support for the Regional Transportation Plan, Transportation Development Plan, analytical support for labor negotiations, and support for Westside light rail capital and operating financial planning.
2. Continue refinement of financial and economic forecasting models. Build new labor rules into cost model.
3. In fulfillment of new UMTA requirements, develop a fully allocated bus route costing model. Improve peak/off-peak cost model.
4. Continue financial capacity analyses. Supplement analysis with financial capacity indicators in fulfillment of new UMTA requirements for Section 3 and 9 applicants.

Relation to Previous Work:

1. Tri-Met has developed several cost models under several grants. These include the financial forecasting system, a marginal cost model, and a peak/off-peak variable cost model. The development of a fully allocated bus route costing model would build on these efforts and would also fulfill new UMTA requirements for contracted service decisions.
2. Existing financial and economic forecast models were developed with assistance from Grants OR-90-2003 and OR-90-2005. This work both continues model refinement and also serves policy planning in on going agency efforts to plan and implement cost containment measures, to develop adequate local operating and capital funding, and to accurately assess Tri-Met's financial condition and five year financial capacity.

Products:

1. Five year financial and economic forecast reports used in budget planning, new revenue, planning, short range (TDP) planning.
2. Financial condition and financial capacity analysis.

3. Revenue estimates, including fare revenues and Westside funding.
4. Fully allocated cost model for bus route costing.
5. Financial analysis of legislative issues.
6. Two economic forecasts of payroll tax revenues, CPI, diesel fuel costs, self-employment and state in-lieu-of tax revenues.
7. Labor cost analysis:

Expenditures:

Tri-Met \$101,200

Revenues:

OR-90-2017	\$15,180
OR-90-2019	3,200
FY'89 Sec. 9	62,580
Tri-Met	<u>20,240</u>
	\$101,200

II. INFORMATION SYSTEMS PLANNING

C. Maintenance Management Information Systems Planning

Program Objectives:

1. Design and develop Staff Management Component of the Comprehensive Maintenance Management Information System for Bus Maintenance.
2. Continue the design and development of a comprehensive maintenance management information system to be completed with the following priorities in order to enhance the Rail Maintenance functions:
 - A. Traction Power
 - B. Right-of-Way Facilities
 - C. Non-Revenue Support Equipment
 - D. Lift Equipment
 - E. Fare Equipment
 - F. Staff Management

Relation to Previous Work:

The bus and rail vehicle history and inventory sub-system of the MMIS were implemented in Fall, 1986 (rail), and Spring, 1987 (bus). The Right-of-Way component of the MMIS will be implemented in February, 1987. Generally, implementation is followed by a period of adjustment and fine tuning.

The Staff Management component will be developed in late Spring 1988 with implementation expected approximately one year later (Winter, 1988).

The receipt of new buses in the Summer, 1988, will result in a more comprehensive use of the tracked component feature of the Fleet Management System requiring developmental work in the areas of component inventory and repair codes. The design and development of the right-of-way and staff management is an extension of the project which will integrate all of the many components of information inherent to a rail maintenance operation.

Products:

1. Major Component Tracking (Bus): The new buses will have all major components inventoried and tracked making available repair history and mileage information on those components. This information can be utilized for component life analysis.
2. The Staff Management Information System: Information on an employee's time, and seniority and position status will be captured. Retrieval of this information will greatly enhance management's ability to analyze loss time and complete labor distribution analysis.

3. Major component tracking (Rail): Activities include the further development of maintenance of way repair codes for fare and lift equipment, and traction power; development of procedures to track the movement of all rail system major components through their repair cycle, including the component history of repair.
4. Non-Revenue Vehicle Tracking: Major activities include the development of repair codes; inventory of non-revenue vehicles; development of preventive maintenance program. The result will be the ability to track non-revenue vehicle history in order to make better informed decisions on vehicle life, and replacement.
5. Rail Facility Tracking Activities: Activities include the development of repair codes preventive maintenance program for the rail operations and station facilities within the maintenance right-of-way.
6. Continue with the detailed design and program development of the right-of-way and staff management sub-systems of the rail maintenance information system. The right-of-way sub-systems will eventually automate maintenance scheduling and analysis for the fare, lift, traction power and support equipment as well as the right-of-way facilities. The staff management sub-system will provide information to do loss-time and labor distribution analysis.

Expenditures:

Tri-Met \$140,000

Revenues:

OR-90-2019	\$ 24,000
FY'89 Sec.9	88,000
Tri-Met	<u>28,000</u>
	\$140,000

II. INFORMATION SYSTEMS PLANNING

D. Operations Information Program

Program Objectives:

1. Develop a method of reporting daily operations information utilizing the new technologies currently available within the agency including phone-mail, local area networks, shared data bases and FAX document transmittals.
2. Develop the technology necessary to interconnect the major databases that deal with operations information (bus dispatch log, rail dispatch log, the customer contact data base, the Maintenance Information System, Rail component tracking data bases.)
3. Develop Rail information system applications for use by Operations Division personnel.
4. Develop a method of connecting existing Rail Operations LAN to Mainframe programs for information utilization and a system of reports for various end users.
5. Develop a computer based program to manage the maintenance and siting of passenger shelters.
6. Develop a program for tracking shelter related complaints, reports of shelter vandalism, and requests for new shelters.

Relation to Previous Work:

Currently, separate bus and rail log activity reports are produced from data bases that reside in the separate dispatch centers. A third major data base is maintained in the customer services department which tracks calls received from outside Tri-Met. The log activity reports (often referred as radio logs) supply important operational information to a wide variety of Tri-Met personnel who have greatly differing needs. As a result, the reports are difficult to read and contain information that is only useful to a few individuals.

Tri-Met has recently installed a new phone system that has voice messaging capabilities and the ability to transmit data between personal computers within the Center Street Administration and Maintenance Buildings. These new technologies make it possible to replace the current activity reports with a several reports that better meet the needs of the end user. At least one of these reports can be available as a recording on the voice messaging system. Personnel who need very specific information can access the data base that contains the information they need.

A Local Area Network has been installed in the Rail Operations Center. Secretarial stations are connected and electronic mail is available to on-site users and a few off-site users. The Radio Log and the MMIS are not connected to the LAN which limits the availability of data to the current LAN users.

Products:

1. A data base that contains information from both rail and bus dispatch centers that can be accessed directly by other agency personnel.
2. A connection between the above data base and the customer services data base that allows the sharing of data.
3. Reformatted operations information reports that are available in an appropriate media and format to be as useful as possible to the end user.
4. The identification of new applications and the coordination of report generation for various departments.
5. Computer policy and procedures manual for Rail Operations.
6. A maintenance information program that can be used to schedule maintenance, budget labor and materials, identify and prevent systematic vandalization, and track customer complaints concerning the condition of passenger shelters.
7. A systematic program that responds fairly and consistently to requests for new shelters.

Expenditures

Tri-Met	\$72,800
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Revenues:

FY'89 Sec. 9	\$58,240
Tri-Met	<u>14,560</u>
	\$72,800

III. PROJECT PLANNING

A. Capital Program Planning

Program Objectives:

1. Coordinate the scheduling, funding, siting and conceptual design of Tri-Met's capital program with other jurisdictions and internally within the agency.
2. Prepare a short-term and long-term capital acquisition program for Tri-Met.
3. Prepare the capital components for the annual update of the TDP and the Strategic Plan.
4. Work with local jurisdictions on proposed transit centers, park-and-ride lots, transit priority measures, TSM measures, road improvements, and transportation plan revisions.
5. Develop a Capital Improvement Program process for annual updating.
6. Undertake a fleet mix study.
7. Develop methodology to prioritize park-and-ride sites and rank candidate projects.

Relation to Previous Work:

The capital program is prepared annually and revised as necessary throughout the year to meet updated requests and needs. Capital program components will also be included in the annual update of the TDP and the Strategic Planning Process.

In addition to preparing the annual capital budget, staff will be developing a total Capital Improvement Program (CIP) analysis process. This effort will track the long range costs of proposed capital projects and will predict the appropriate replacement schedule for on-going capital requirements. The CIP results will be incorporated into the FY'89-93 Transit Development Plan. As in previous years, staff will combine project development work on new and emerging capital project proposals, continue technical participation in ongoing local and regional transportation plan revisions, and maintain a transit presence in the road development/improvement review process.

Staff will also be analyzing the types of complementary facilities that may be accommodated at or near transit facilities.

Products:

1. Annual Tri-Met capital budget.
2. Input to State and Federal capital grant applications.
3. Capital component of the TDP and the Strategic Plan.
4. Site and conceptual design work supporting documentation and local approvals for newly proposed projects.
5. Capital improvements, program process and report.
6. Transit revisions to regional and local jurisdictional plan updates.
7. Fleet mix study and report.
8. Report including priority methodology for park-and-ride lots and ranking of projects.

Expenditures:

Tri-Met \$175,500

Revenues:

OR-90-2019	\$ 12,000
FY'89 Sec. 9	128,400
Tri-Met	29,500
City of Portland	<u>5,600</u>
	\$175,500

III. PROJECT PLANNING

B. Westside Light Rail Project

Program Objectives:

The Westside LRT Project is the major outgrowth of Alternatives Analysis of the Westside Corridor Project. There are four major objectives of the Westside LRT Project:

1. Undertake engineering studies sufficient to specify a final alignment, profile and cost estimate.
2. Investigate the environmental impacts of the project and measures to mitigate them.
3. Put together a feasible financial plan to construct and operate the project.
4. Involve local citizens and jurisdictions in the decision-making process and gain political support for the project.

Relation to Previous Work:

By July 1, 1983, the Westside Light Rail Project had completed the (a) alternatives analysis, (b) DEIS, (c) public hearings, (d) selection of preferred alternatives, and (e) the PE/FEIS grant application. Between 1983 and 1986, Tri-Met updated its patronage and service assumptions in a regional framework which confirmed the viability of the project. The process over the next 18 to 24 months is intended to produce material for review by the participating agencies as adopted in August 1983, including:

1. The Final Environmental Impact Statement.
2. The Westside LRT Preliminary Design which addresses the environmental concerns and design suboptions raised during local jurisdiction public hearings.
3. A feasible funding package to construct and operate the Westside LRT Project will be recommended and an implementation plan/strategy agreed to.

4. Cost-effectiveness Indices will be prepared suitable for submission to UMTA together with a series of working papers detailing the methodology and underlying assumptions.

The following related activities have taken place during this past year.

1. The Banfield LRT Project (MAX) continued successful operations on schedule and has continued to exceed ridership expectations.
2. All involved local jurisdictions continue to support moving ahead with the project as the region's top transit priority.
3. Tri-Met staff have reviewed and updated the work program and budget for the PE/FEIS process.
4. Preliminary discussions have continued between the jurisdictions and UMTA regarding needs and expectations of the PE/FEIS process.
5. Tri-Met has budgeted the PE/FEIS program to begin major work during FY 87-88.
6. Financial planning activities for the Westside LRT have been fully coordinated with the Public/Private Task Force on Transit Finance.

Products:

1. An assessment of Tri-Met's financial condition and capability will be completed consistent with UMTA's Circular of March 30, 1987.
2. Engineering drawings at 1" = 20' and 1" = 50' of the Westside LRT alignment and detailed site plans and designs of stations.
3. Cost estimates of right-of-way, alignment and track construction, overhead wires, signals, stations, vehicles, and maintenance facilities, and all other components of the project.
4. LRT operating plan including string charts and labor build-up staffing table.
5. FEIS for the project.

6. Inventory of Public and Private sector financing options together with recommended funding models for the Westside LRT will be prepared by the Public/Private Task Force on Transit Finance.
7. A Financial Plan recommending public and private sources to construct and generate the Westside LRT will be prepared. Support materials required for implementation of the financial plan will be prepared together with a detailed strategy to secure implementation of the recommended package.
8. An ongoing community involvement program to ensure a high level of citizen participation throughout the project.

Expenditures

Tri-Met \$2,981,300

Revenues

OR-90-X011	\$719,020
OR-23-9002	65,704
FY'88 Sec. 9	1,604,180
Tri-Met	<u>592,396</u>
	\$2,981,300

IV. SERVICE PLANNING, ANALYSIS, AND EVALUATION

A. Service Development Planning

Objectives:

1. Complete Suburban Transit Plan which was begun in FY'88.
2. Develop implementation procedures and detailed service change proposals for Suburban Plan results.
3. Develop a route level forecasting model using EMME/2 software.
4. Develop comprehensive transit plans for selected market areas.
5. Maintain and enhance on-going Service Planning programs, primarily the Annual Service & Marketing Plan and Quarterly Service Report.

Relation to Previous Work:

Previous work has focused on the Suburban Transit Plan. This year's work will finish the study and begin the implementation phase.

Much work has been done concerning service to the Northwest Portland area. The comprehensive plan will serve as a prototype for future area plans.

The route level model will build on previous EMME/2 work both at Tri-Met and METRO.

Products:

1. Suburban Transit Plan
2. Service change proposals
3. Implementation procedures for service changes
4. Route level forecasting model
5. Transit plan for selected market areas.

Expenditures:

Tri-Met \$195,000

Revenues:

OR-90-2019	\$ 20,800
FY'89 New:	135,200
Tri-Met	<u>39,000</u>
	\$195,000

IV. SERVICE PLANNING, ANALYSIS AND EVALUATION

B. Market Segmentation Analysis

Program Objectives:

1. To analyze the characteristics of our market that attract or inhibit ridership.
2. To determine which market have the greatest potential for development.
3. To determine which markets segments are motivated by service characteristics, which segments are motivated by behavioral changes, and which segments are motivated by attitudinal factors.

Relation to Previous Work:

Data has been collected that provides solid travel behavior information for the regional trip market. Information has been collected to revise the models for patronage estimation, especially in conjunction with light rail. So far, however, all data collection has related to actual trip behavior, and not other factors that effect the decision to make a trip using transit.

This work is intended to determine, more precisely, the reasons why people do not use transit. Information gathered will help decide if our product does not meet expectations (comfort, hours of operation, service frequency, image, flexibility, etc.), or if behavioral actions are the prime inhibitor (day care responsibilities, need car for work), or if it is the service design. A detailed analysis will enable Tri-Met to better design its service to meet needs, including the use of para-transit alternatives.

Products:

1. Analysis of Tri-Met ridership turnover.
2. Analysis of what are our best markets.
3. Analysis of what Tri-Met can do to better meet the needs of the public without general service increases.

Expenditures:

Tri-Met \$ 95,000

Revenues:

OR-90-2019	\$ 8,000
FY'89 Sec. 9	68,000
Tri-Met	<u>19,000</u>
	\$ 95,000

IV. SERVICE PLANNING, ANALYSIS, AND EVALUATION

C. Market Evaluation

Program Objectives:

1. To evaluate market programs and judge their effectiveness in increasing market share, and meeting the objectives of the Marketing Plan.
2. To provide the analysis necessary to update the Marketing Plan, and evaluate new programs for their market potential.

Relation to Previous Work:

Previous work has focused on where we have potential on a regional or area specific basis. It has dealt with the finding of potential markets, but not evaluating our success at tapping those markets. This evaluation is important as the input to future service planning efforts.

Products:

1. An evaluation of the effectiveness of our ability to move into new markets, as outlined in the current marketing plan.
2. An evaluation of the market effectiveness potential of new programs, for inclusion into next year's marketing plan.

Expenditures:

Tri-Met	\$60,000
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Revenues:

FY'89 Sec. 9	\$48,000
Tri-Met	<u>12,000</u>
	\$60,000

V. SPECIAL AREA PLANNING

A. Civil Rights Planning

Program Objectives:

1. Complete a thorough analysis of DBE participation in Tri-Met contracts.
2. Develop a computerized DBE contract monitoring process.
3. Identify areas of strength in the program which can be capitalized upon and areas of weakness which can be targeted for special efforts to resolve problems.
4. Develop a procedure to be used in establishing realistic project-specific DBE goals.
5. Revise and update, as necessary, Tri-Met's DBE policy statement.
6. Review and update submission of information relative to minorities in the urbanized area, as required by UMTA Title VI Circular 1160.1.
7. Develop a procedure for implementation and administration of the District's Equal Employment Opportunity (EEO) Program.
8. Develop and refine an EEO database.
9. Develop and implement a DBE community outreach program.

Relationship to Previous Work:

The updated Title VI report is a required submission. Revising and updating Tri-Met's DBE policy is an ongoing process. The policy requires periodic updating to reflect current regulations and changing local conditions. A process for monitoring contracts is now required by UMTA. This is a priority project which will require development of new procedures and methods to track DBE participation. The DBE outreach program is a special effort to improve DBE awareness of land participation in Tri-Met's DBE program. The EEO monitoring activities are new program objectives.

Products:

1. A program for improving Tri-Met's overall DBE level of participation in contracted services.
2. A revised agency DBE policy statement.
3. An updated Title VI report for submittal to UMTA.
4. An automated DBE contract monitoring system for submittal to UMTA.
5. Procedure for implementation and administration of the District's EEO Program.
6. An automated EEO monitoring system.

Expenditures:

Tri-Met \$25,000

Revenues:

OR-90-2019	\$ 600
FY'89 Sec. 9	19,400
Tri-Met	<u>5,000</u>
	\$25,000

V. SPECIAL AREA PLANNING

B. Privatization

Program Objectives:

- B. Identify areas where private sector service may be more efficient.
2. Provide information regarding private operation to interested organizations.
3. Aid in development of fully allocated cost study.
4. Develop alternatives for contract negotiations.
5. Establish means to finance local share of transit projects through public/private partnerships and joint development.
6. Determine optimum footprint for private development at selected transit stations for incidental surface and air rights to be developed by private sector.

Relation to Previous Work:

Follows work in OR-90-2019. Moves from general development of policies and review of service alternatives to consideration of specific alternatives.

Products:

1. Specific proposals for private sector services.
2. Fully allocated cost analysis for selected routes.
3. Proposals for changes in labor contract.
4. Land utilization analysis.
5. Alternative schematic site plans.
6. Transit modal split analysis of various development configurations.
7. Cost analysis of public improvements and cost penalty if any to the private developer.

8. Pro formas.
9. Lease revenue stream/transit modal split scenarios.
10. Packaging of state of art value capture techniques including benefit assessment for possible extension of lines

Expenditures:

Tri-Met \$106,300

Revenues:

OR-90-2017	\$ 12,000
FY'89 Sec. 9	73,040
Tri-Met	<u>21,260</u>
	\$106,300

V. SPECIAL AREA PLANNING

C. Special Needs Transportation Planning

Program Objectives:

1. To plan for improved fixed-route and paratransit services and information for the elderly and disabled.
2. To coordinate elderly and handicapped citizen involvement.
3. To finalize options for SNT reporting and scheduling.
4. To develop timelines and plans for new methods of coordinating service and information.

Relation to Previous Work:

Builds on OR-90-2019. Continues ongoing citizen involvement. Planning moves from considering fixed route, door-to-door, and volunteer programs separately to coordinating all services.

Products:

1. Recommendation from CAT on new accessible fixed route bus usage.
2. CAT agendas, minutes, and yearly report.
3. Report on methods for coordinating service and information concerning fixed route, door-to-door, and volunteer programs.
4. Plan and schedule for implementation of reporting and scheduling system within the three main SNT dispatch centers.

Expenditures:

Tri-Met \$ 95,000

Revenues:

FY'89 Sec. 9	\$ 76,000
Tri-Met	<u>19,000</u>
	\$ 95,000

V. SPECIAL AREA PLANNING

D. Physical Abilities/Medical Standards Project

Program Objectives:

1. Document the short and long-term physical requirements of the bus operator and two other jobs.
2. Research tests which effectively simulate major or critical demands and/or link medical examination results to specific job requirements.
3. Develop an efficient framework for the administration of the pre-employment screening program.
4. Recommend medical standards which would be indicative of the ability to perform the work with low risk of injury.
5. Validate the developed standards.

Relationship to Previous Work:

We expect this project to be completed by 6/30/88. If not, the remaining work will likely be writing the final report and training our contracted medical providers to use the finished product.

Products:

1. A written documented program of job analysis, job related medical and/or physical standards and evaluations.
2. A report describing validation methodology of the developed standards.

Expenditures:

Tri-Met	\$18,000
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Revenues:

OR-90-2019	\$14,400
Tri-Met	<u>3,600</u>
	\$18,000

VI. LONG-RANGE PLANNING

A. Strategic Planning

Program Objective:

Strategic Planning was initiated by Tri-Met in 1985 to improve executive decision making. For the purposes of the District, Strategic Planning is defined as the process of systematically identifying opportunities and threats that lie in the future which, in combination with other relevant internal and external data, will provide a basis for making better short-term decisions.

Relation to Previous Work:

Strategic planning has been used as a management tool to strengthen executive decision-making at Tri-Met since it was initiated in 1985. For the past three budget cycles annual agency priorities have been established through the districts strategic planning process. The priorities set the tone for where Tri-Met wants to place special emphasis and what we want to accomplish in the coming year. The proposed Transit Development Plan and the budget are practical examples of strategic planning policies being operational at Tri-Met.

Products:

The strategic planning process is designed to produce a series of products including:

1. Implementation and refinement of an annual planning cycle.
2. A situational audit (annual) which includes a critical assessment of Tri-Met's strengths and weaknesses, an analysis of external trends and forces impacting the District, and a synthesis of the aforementioned factors.
3. A document analyzing public perceptions of Tri-Met, and the acceptance by the public of Tri-Met's Strategic Plan will be complete in support of situational audit.
4. A Strategic Policy Option analysis which results in the development of a strategy for Tri-Met which defines critical choices and tradeoffs.
5. A revised Five Year Strategic Plan which sets forth the District's five year vision and identifies areas for emphasis.

6. Identification of annual goals and priorities which will be emphasized during the annual budget building.

Expenditures:

Tri-Met \$ 80,000

Revenues:

OR-90-2019	\$ 19,800
FY'89 Sec. 9	44,200
Tri-Met	<u>16,000</u>
	\$ 80,000

VI. LONG RANGE PLANNING

B. TDP Annual Update

Program Objectives:

1. To annually revise the TDP and update all technical information and five year plans in light of Tri-Met's strategic planning process.
2. To review the TDP draft document with local jurisdictions prior to the Board's approval.
3. To analyze the impacts of the FY'88-92 TDP and make appropriate modifications.
4. To review and distribute the draft and final document to interested parties.
5. To identify service deficiencies which are projected to exist in FY'93.
6. To estimate patronage potential which would result from remedying each deficiency.
7. To develop alternative sketch level service plans to remedy the most serious deficiencies. Estimate patronage, operating and capital costs for each alternative.

Relation to Previous Work:

The staff will be reviewing, revising and updating the previous FY'88-92 Transit Development Plan. The updated version will reflect changes in service assumptions, capital funding allocations, and operating funding allocations. As part of this analysis staff will be developing a more in-depth analysis of service deficiencies and will estimate the patronage potential of increased service levels. This analysis would include the input of previous results from the Suburban Transit Plan Study.

Products:

1. Five-year operations and capital development plan based upon an analysis of strategic alternatives and financing constraints.
2. A five-year financing plan to accommodate regional transit service and capital needs.
3. A technical report to be incorporated into the TDP, documenting service standards; methodology for identification of service deficiencies; patronage projections and cost analysis of alternative networks.

Expenditures:

Tri-Met \$58,500

Revenues:

FY'89 Sec. 9	\$46,800
Tri-Met	<u>11,700</u>
	\$58,500

PROGRAM ADMINISTRATION

Program Objectives:

1. Monitor and ensure that planning project activities and expenditures conform with the UWP.
2. Ensure that appropriate grant file documentation of activities and expenditures is provided for.
3. Provide quarterly financial and progress reports for all UWP planning projects.
4. Initiate requests for any required budget revisions, grant amendments, and UWP amendments.

Relation to Previous Work:

Although many of the grants administration activities are ongoing, special staff effort this past year went into developing a better system for monitoring actual vs. projected expenditures for planning projects. The basic system is functioning, but we anticipate making improvements and refinements in the coming year.

Products:

1. Quarterly financial and progress reports.
2. Budget revisions, grant amendments, UWP amendments.

Expenditures:

Tri-Met	\$15,000
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Revenues:

FY'89 Sec. 9	\$12,000
Tri-Met	<u>3,000</u>
	\$15,000

09uup
2/25/88

FY 89 UNIFIED WORK PROGRAM FUNDING SUMMARY

-----federal funding-----																			
-----CARRYOVER-----																			
	89 PL/000T	89 SEC 8	UNTA 89E(4)	FHWA 89E(4)	89 000T	88/89 SEC 9	29-9011 88 SEC8	88-0054 88 SEC8 (PPTF)	29-9012 87 E(4)	29-9010 85 E(4)	29-9008 83 E(4)	87 TA EXPAN	90-2019 87 SEC9	90-2017 86 SEC9	90-X011	23-9002	88 HPR	LOCAL MATCH	TOTAL
METRO																			
RTP UPDATE/REFINEMENT	25000	40000			43926		14000											30145	153871
RTP PRIVITIZATION/METRO		14000																3500	17500
TRI NET						73040								12000				21260	106300
SOUTHEAST CORRIDOR		16000		13372	10482				40000									7146	87000
PHS I ALT ANALYSIS/METRO			50575							25000	20000							8925	104500
WESTSIDE LRT						28000												7800	35000
DATA, GROWTH MONITORING	45700	60000		45647	2500	2000												141834	297683
TRAVEL MODEL REFINEMENT	16247				47500	75000												23750	162517
TECHNICAL ASSISTANCE	71125			75000	27500	20000						16100						12000	221725
BANFIELD AFTER/METRO						20000												5000	25000
SUBURBAN TRANSIT						30600												7500	37500
TRANS IMPROVE PROGRAM	31900	60000			18092													10000	120000
COORDINATION/MANAGE	30000	14000		40406					0									38094	122500
PUB/PRIVATE TASK FORCE		20000						80000										25000	125000
BI-STATE STUDY	15000													0		0	0	0	15000
																		0	0
Metro SUBTOTAL	235000	224000	50575	174425	150000	248040	14000	80000	40000	25000	20000	16100	0	12000	0	0	0	341156	1630296
000T PLANNING ASSIST	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	179400	0	179400
TRI NET																			
EFFICIENCY PLANNING						142440							97120	15000				63640	318200
INFORMATION SYSTEMS PLAN						295220							47200	15180				79400	397000
PROJECT PLANNING						1897500							12000		719020	45704		627496	3121000
SERVICE PLAN ANALY/EVAL						251200							20600					70000	350000
SPECIAL AREA PLANNING						95400							15000					27600	130000
LONG RANGE PLANNING						91000							19800					27700	138500
PROGRAM ADMINISTRATION	0	0	0	0	0	12000	0	0	0	0	0	0					0	3000	15000
																		0	0
Tri-Net SUBTOTAL	0	0	0	0	0	2544040	0	0	0	0	0	0	219920	30180	719020	45704	0	898836	4478500
GRAND TOTAL	235000	224000	50575	174425	150000	2792880	14000	80000	40000	25000	20000	16100	219920	42100	719020	45704	179400	1239992	6208196

Note: PL/000T is \$235,000 comprised
of \$ (89.06%) federal share
and \$ (10.94%) 000T match
and \$ carryover

7 RECEIVED FEB 1 9 1988



Port of Portland

Box 3529 Portland, Oregon 97208
503/231-5000
TWX: 910-464-5105

February 17, 1988

Mr. Andrew Cotugno
Transportation Director
METRO
2000 S.W. First Avenue
Portland, OR 97201-5398

Dear Mr. Cotugno:

This letter is written to inform you that Dennis West has left the Port and will, therefore, no longer be the Port attendee at the JPACT Committee meetings. In the future, Carter MacNichol, Director, Real Estate Management and Development, will be our designated attendee.

Thank you very much for your help with this.

Yours very truly,

Robert L. Woodell
Executive Director

01X072



Port of Portland offices located in Portland, Oregon, U.S.A., Boise, Idaho, Chicago, Illinois, New York, N.Y., Washington, D.C., Hong Kong, Manila, Seoul, Singapore, Sydney, Taipei, Tokyo, Henley-on-Thames, England

COMMITTEE MEETING TITLE JPACT
DATE 3-10-88

NAME	AFFILIATION
S- Andy Cohen	Metro
M- Earl Blumman	Portland
MA- Jimmy Cole	CITIES OF WASHINGTON COUNTY
M- Vern Veersey	Clark Co.
M- Ed Ferguson	WSDOT
MA- Rick Kuehn	ODOT
M- George Dan Ferguson	MSD
M- RICHARD C. WAKER	METRO
MA- Tom Beupham	DEQ
M- CARTER MACNICHOL	PORT
M- Scott A. Collier	City of Vancouver
M- Marjorie J. Schumack	Cities of Mult County
✓ G- Cynthia Stanton	TRI-MET
✓ G- Lee Harner	TRI MET
✓ G- Ted Salner	ODOT
✓ G- Gary Spanovich	Clatsop County
✓ G- Keith Akola	WSDOT
✓ G- Jimmy Moore	ODOT - Transit
✓ G- STEVE FOSLER	NW DISTRICT ASSOCIATION
✓ S- Karen Charleston	Metro
✓ G- Hugst Kisses Lois - GRACE	The evi / central city
✓ S- Richard Brandman	Metro
✓ G- Fred Gatson	FHWA

COMMITTEE MEETING TITLE _____

DATE _____

NAME

AFFILIATION

✓ G. Peter 77m

Bill Patton

✓ M-Bonnie Hays

CEIC

Metro

Wash. County