



LANE TRANSIT DISTRICT BOARD OF DIRECTORS WORK SESSION

Wednesday, June 21, 2023
5:30 – 7:00 p.m.

IN-PERSON & VIRTUAL MEETING

LTD Board Room
3500 E. 17th Avenue, Eugene
(Directions below)

Zoom: Link to watch live provided on the web calendar at www.LTD.org.

Broadcasting: Watch live on channel 21 or via link: <https://metrotv.omninet.org/>

AGENDA

	<u>ITEM</u>	<u>Time</u>	<u>Page</u>
I.	CALL TO ORDER	5:30 p.m.	
II.	ROLL CALL <input type="checkbox"/> Gino Grimaldi (President) <input type="checkbox"/> Susan Cox (Vice President) <input type="checkbox"/> Pete Knox (Secretary) <input type="checkbox"/> Kelly Sutherland <input type="checkbox"/> Lawrence Green (Treasurer) <input type="checkbox"/> Michelle Webber <input type="checkbox"/> Heather Murphy		
III.	COMMENTS FROM BOARD PRESIDENT <i>This agenda item provides an opportunity for the Board president to formally communicate with the Board on any current topics or items that may need consideration.</i>		
IV.	COMMENTS FROM THE GENERAL MANAGER <i>This agenda item provides an opportunity for the general manager to formally communicate with the Board on any current topics or items that may need consideration.</i>		
V.	ANNOUNCEMENTS AND ADDITIONS TO AGENDA <i>This agenda item provides a formal opportunity for the Board president to announce additions to the agenda, and also for Board members to make announcements.</i>		
VI.	AUDIENCE PARTICIPATION <u>Public Comment Note:</u> The Board sets aside time at the beginning of the meeting for members of the public to provide public comment. We appreciate hearing from the public and encourage use of this opportunity. Comments are directed to the Board. If a Board member has a clarifying question, it will be directed to staff when the person testifying has completed his/her comments. Public testimony is limited to three (3) minutes per community member. Testimony may be provided via e-mail at clerk@ltd.org .	5:35 p.m.	
A.	MOBILITY MANAGEMENT STRATEGY: <i>Materials Included</i> [Andrew Martin, Senior Development Planner] Action Needed: Information and Discussion	5:45 p.m.	3
B.	STRATEGIC BUSINESS PLAN REPORTING: <i>Materials Included</i> [Aimee Reichert, Project Manager II] Action Needed: Information and Discussion	6:05 p.m.	57
VII.	ADJOURNMENT	6:25p.m.	

The facility used for this meeting is wheelchair accessible. To request a reasonable accommodation or interpreter, including alternative formats of printed materials, please contact LTD's Administration office no later than 48 hours prior to the meeting at 541-682-5555 (voice) or 7-1-1 (TTY through Oregon Relay).

Time

Page

LTD Administrative Office: The office is located at 3500 East 17th Avenue (off Glenwood Blvd. in Glenwood). Click [here](#) for a map.

Bus:

From Eugene Station: Take the EmX bus from the LTD Downtown Station and get off at the outbound Glenwood EmX stop (in front of Planned Parenthood). From there walk west to the corner of Franklin Blvd. and Glenwood Blvd. and turn left. Continue walking south on Glenwood Blvd to 17th Avenue and turn left. The building entrance faces 17th Avenue.

From Springfield Station: Take the EmX bus from the Springfield Station and get off at the outbound Glenwood EmX stop (across Franklin Blvd. from Lane Forest Products). From there walk east to the crosswalk to cross Franklin Blvd., proceed south on Glenwood Blvd. Continue walking south on Glenwood Blvd to 17th Avenue and turn left. The building entrance faces 17th Avenue.

Bicycles: There are covered bicycle racks located by the front entrance.

Parking: Parking is available for free in the parking lot at the front of the building on 17th Avenue.



AGENDA ITEM SUMMARY

DATE OF MEETING: June 21, 2023

ITEM TITLE: MOBILITY MANAGEMENT STRATEGY UPDATE

PREPARED BY: Andrew Martin, Senior Development Planner

CHIEF OFFICER: Joe McCormack, Chief Development Officer

ACTION REQUESTED: Information and Discussion

PURPOSE: To provide an update to the Board on the development of the Mobility Management Strategy and implementation tools.

DESCRIPTION: The Mobility Management Strategy (MMS) was developed to help LTD to become a successful mobility manager for the region. Mobility management is a customer-centric approach to providing transportation services. Often this means working in partnership with other agencies and service providers to match customers with the best transportation choice for their individual trip. LTD's interest in mobility management stems from a desire to connect our community. Coordinating with partners and broadening our services will allow LTD to serve more of the community and provide more mobility in our region.

LTD has a long history of engaging in mobility management activities. Examples of this include LTD's partnerships to offer contracting support to Oakridge on the Diamond Express service, LTD's bundling of programs into the RideSource call center, the LTD Connector in Cottage Grove, and LTD's involvement in the PeaceHealth Rides bikeshare system. However, these programs were not developed in a coordinated way. The Mobility Management Strategy is LTD's way of systematically engaging in mobility management and embedding it as a cornerstone of our approach to providing public transportation to our customers.

The Mobility Management Strategy is a high-level strategy document that describes *how* LTD can be successful in advancing its mobility management efforts. This includes determining the most appropriate role for LTD to play in projects throughout the region by implementing a decision-making framework, a guide for developing and learning from pilot projects, and technical memos that help provide context and best practices on how LTD can fill gaps in the transportation network.

BACKGROUND: Since August 2021, staff and consultants at Toole Design Group have been working to develop the Mobility Management Strategy. The process included looking at best practices and the state of the industry, technical analyses of services in the area, and a public outreach. From this work, the project team has developed a series of deliverables that form the basis for LTD to continuing improving how we connect our community.

The work that went into the Mobility Management Strategy helped to highlight that LTD is already a mobility manager, playing many types of roles in a variety of different kinds of projects within the district. LTD's work in these areas help provide mobility to community members, allowing them to run errands, commute to work, visit with friends and family, and more. LTD's mobility management efforts include operating a fixed-route bus network, myriad eligibility-based programs through the RideSource call center, mobility on demand service in Cottage Grove, contracting and other support on Diamond Express and Rhody Express, among many other services.

Key pieces of the Mobility Management Strategy are: mobility management is an effective way for LTD to fill gaps in our services, LTD should play a key role in facilitating mobility in our region, and there are many opportunities for LTD to explore. LTD can do this work through investing in the fixed-route transit system, exploring pilot projects to test new modes and service models, and implementing the project's decision-making framework. The strategy also highlights how LTD can approach filling gaps in service in different kinds of opportunity areas.

The Board and public will see the Strategy be implemented in several ways over the next few years. LTD has begun updates to several major plans and projects and will update others over the next several years. The findings of the Mobility Management Strategy will be embedded into the Comprehensive Operations Analysis, RideSource

Operations Analysis, Long Range Transit Plan update, Strategic Business Plan update, and others. Additionally, staff have begun putting together a mobility management taskforce, composed of individuals from across many LTD departments, that will help advise the Executive Team on mobility management efforts and how the agency can evolve to support those efforts. Through the most recent STIF process, LTD secured funding for a pilot project that can begin in July 2024. Finally, staff are actively developing partnerships with other public agencies, nonprofits, the private sector, and local universities and investigating additional grant opportunities to advance LTD's mobility management efforts.

A presentation will be provided to explain this topic in further detail.

CONSIDERATIONS: The Mobility Management Strategy will not result in any immediate service changes; however, this work will be incorporated into upcoming projects like the comprehensive operations analysis, Long Range Transit Plan update, Strategic Business Plan, and others that will change how LTD is serving the community. Additionally, LTD has secured funding to operate a mobility pilot in FY25 through the State Transportation Improvement Fund (STIF) and will continue to seek additional funding sources to implement mobility management projects in the near term.

SPC met and discussed the Mobility Management Strategy on May 23, 2023. Due to lack of quorum, SPC was unable to make a recommendation to the board on adoption of the Mobility Management Strategy. Members who were present at the meeting expressed support for LTD to adopt the Mobility Management Strategy.

ALTERNATIVES: N/A

NEXT STEPS: Staff will ask the Board to formally adopt the Mobility Management Strategy at their regular meeting.

SUPPORTING DOCUMENTATION:

- 1) Mobility Management Strategy
- 2) Mobility Management Strategy Decision-Making Process Summary
- 3) Pilot Program Implementation Guide

PROPOSED MOTION: N/A



LTD



LTD Mobility Management Strategy

May 2023



CONTENTS

- How to use this document 1
- What is mobility management?.....2
- Mobility management outcomes4
- LTD is already a mobility manager5
- How the strategy was developed7
- Key components of the strategy 10

ACKNOWLEDGEMENTS

Technical Advisory Committee

- Cascadia Mobility
- City of Cottage Grove
- City of Creswell
- City of Eugene
- City of Springfield
- Lane Community College
- Lane Council of Governments
- Lane County
- Oregon Department of Transportation
- University of Oregon

Prepared by

Toole Design in collaboration with Cogito and Via.

How to use this document

The transportation ecosystem is rapidly evolving. Technology is empowering agencies and private companies to experiment and deliver services in new ways. Customer expectations are rapidly shifting. Transit agencies, who traditionally owned and operated their services, are increasingly finding it advantageous and necessary to partner with the private sector to deliver the transportation options that their communities need.

Within this context, Lane Transit District developed this Mobility Management Strategy (MMS) to learn how to best collaborate with public and private partners to provide a robust transportation network and deliver new mobility options that can increase access to housing, jobs, services, and other opportunities in the region. The Strategy will help LTD improve its internal processes, identify the opportunities that achieve LTD's vision of a more connected, sustainable, and equitable community, and better serve the public.

More specifically, the purpose of the Strategy is to:

-  Analyze needs and gaps in transportation services provided in LTD's service area and those groups having specific mobility needs.
-  Understand the best role for LTD and its partners to play in supporting new mobility options – including new projects, programs, and services.
-  Define a process for LTD to make decisions about its role in new and non-fixed-route mobility options.
-  Identify key actions that LTD can take towards improving their role as a mobility manager and working more effectively with partner agencies, private sector mobility providers, and community partners.
-  Create tools and resources to more effectively deploy pilot projects that test, evaluate, and refine new mobility projects, programs, and services.

The Strategy assesses where there may be opportunities for new mobility options to fill existing needs in the region. However, it does not identify specific mobility projects, programs, or services, or make any recommendations for changes to the fixed-route transit network. The Strategy will serve as the basis for establishing LTD's longer-term plans and programs for development of a broader mobility management system for the region.

The process to develop the Strategy resulted in several technical memoranda and other documents that will aid staff as they work to implement the Strategy. This document is intended to summarize those findings and to help the community, stakeholders, and partner agencies to see how LTD will be working towards improving transportation in Lane County.



What is mobility management?

Mobility management is a collaborative approach that uses a wide array of coordinated transportation projects, programs, and services to deliver mobility options that best meet the needs of the community. Rather than focus on just one mode (like the bus, bikes, or a private automobile), mobility managers support a variety of modes so that users can choose the best option based on where they are going, cost, travel time, time of day, their physical ability, and other considerations (such as someone carrying goods, tools, or luggage).

Effective mobility management relies on partnerships between multiple agencies, community-based organizations, and the private sector to deliver service; encourages innovation and flexibility; and evaluates or adjusts service based on performance and customer feedback.

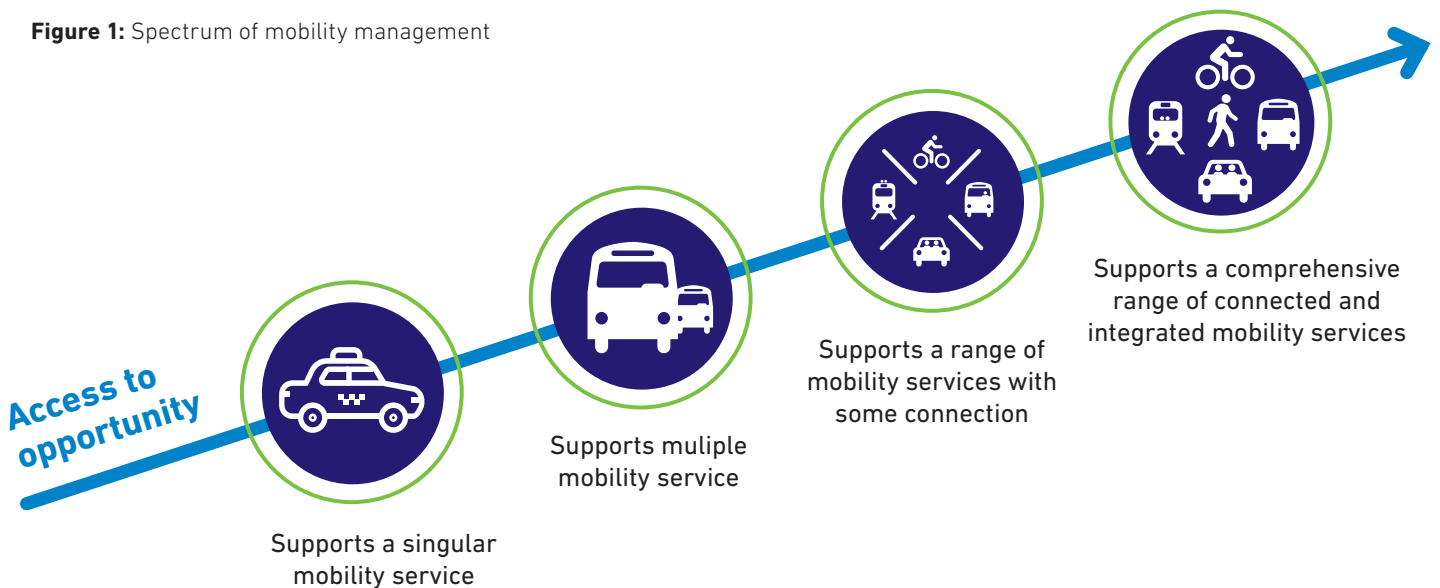
Although new technologies and travel modes are often involved, mobility management is really about coordinating different parts of the travel experience so that users can seamlessly choose from an array of options for a given trip. In areas with high levels of mobility management, users don't notice or care that different operators are responsible for different parts of their trip –

they choose the modes that best meet their needs and the mobility operators figure out how to make the trip work.

For agencies, mobility management provides a more complete and seamless network of mobility options that can help address the diverse needs of the traveling population, provide redundancy in the transportation network, and add convenience through on-demand travel options. Although specific services may not be cheaper in isolation, they may become more cost-effective at scale and can provide efficiencies in the existing fixed-route network as well as drive up ridership on existing services.

Engaging as a mobility manager means assuming greater responsibility for mobility in the region and consequently this results in leading or supporting additional services, more partnerships, and filling additional roles in mobility projects and services. Mobility management is a spectrum and agencies and providers will necessarily play different roles in different projects with the ultimate goal being a more robust transportation system that increases access to housing, jobs, services, and other opportunities in the region.

Figure 1: Spectrum of mobility management



There are numerous roles associated with mobility management. These could be filled by local and regional agencies, non-profit organizations, private businesses, etc. One role may be filled by multiple organizations. Similarly, one organization may play several roles or play different roles for different services.

OWNER:

Maintains ultimate responsibility and liability for the program or service and associated assets. Responsible for ensuring that all roles are filled.

MANAGER / COORDINATOR:

Leads day-to-day and long-term management, may include contracting, collecting and dispersing funds or services, and administrative responsibilities.

FUNDER:

Provides funding for a service or program. Level of funding is irrelevant. Only refers to monetary contributions, does not include staff time or in-kind contributions.

PLANNER:

Provides critical support for a program or service, such as assessing feasibility, or trip or route planning.

OPERATOR:

Responsible for on-the-ground service delivery; could include service deployment; fleet and equipment maintenance; recruiting, training, and overseeing drivers; fare collection; rebalancing micromobility devices, etc. May be responsible for collecting customer or trip-related data.

TECHNOLOGY PROVIDER:

Provides software or other technology needed to operate a program or service. This is typically relevant for services that require routing, trip planning, or fare collection.

VEHICLE PROVIDER:

Provides “vehicles” including shuttles, vans, buses, bikes, e-scooters, etc. This typically includes responsibility for the maintenance of vehicles or lending/leasing vehicles to others.

FACILITY PROVIDER:

Provides space or physical infrastructure to house the technology needed to operate a program or service, e.g., parking spaces, electric vehicle charging infrastructure, etc.

PARTNER / ADVISOR:

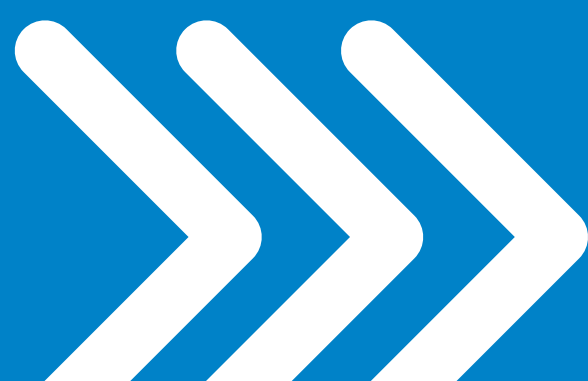
Provides strategic input or support during key milestones of programming or service planning or evaluation; could include helping with specific tasks such as permitting or station siting.

DATA ANALYST:

Analyzes customer, ridership, trip, and other data to report key performance metrics to funders, stakeholders, or community members, or uses data as part of academic research. The analyst does not make decisions about the future of a program or service.

PROMOTER:

Raise awareness of existing service or program to potential customers, could include marketing and community outreach to the public or specific populations.



Mobility management outcomes

LTD is interested in mobility management as a way to think about better serving our community. LTD provides millions of rides each year, yet we know that LTD's current services don't allow all of our community members to easily make many of the trips they need to take to get to work, medical appointments, buy groceries, and visit with friends and family.

Through conversations with community members and analysis of our services, LTD understands that we can do more to connect our community. Mobility management is an orientation to providing service that is more flexible and allows LTD to be the transit agency our community needs us to be.

LTD working as a mobility manager will mean that LTD continues to focus on providing a reliable and useful

fixed-route transit network. However, LTD will also be more aggressive in pursuing opportunities to implement services that allow the community to better connect with the places they want to go. To achieve this, LTD will need to partner with the private sector, non-profits, and other government agencies. LTD will also need to experiment and test new service models through pilot projects.

As LTD pursues a greater role in the region's mobility, new services will support LTD's broader policy objectives including helping the community to reduce greenhouse gas emissions, promoting equity, reducing traffic congestion, and providing high-quality services that are efficient for our tax payers. Mobility management will allow LTD to deliver on our mission of "connecting our community."



LTD is a partner in the PeaceHealth Rides bikeshare system.

LTD is already a mobility manager

LTD is the largest operator of fixed-route transit service in Lane County. However, LTD has a long history of being much more than an operator of traditional transit buses. Figure 2 contains a sample of some of the programs and services that LTD is engaged in.

LTD's roles in these programs vary from full funding and operations to support roles such as planning, pass-through funding, coordination, contracting support, providing vehicles and facilities, analysis, and more. LTD currently fulfills every mobility management role through existing programs and partnerships.

LTD is well situated to expand as a mobility manager. It is one of the few regional agencies responsible for providing transportation, allowing it to serve all of Lane County and to partner with agencies in other counties for even greater regional connections. LTD is the only transportation provider in the region that is funded by the Federal Transit Administration, which comes with many opportunities for funding and support but also some challenges related to increased regulation.

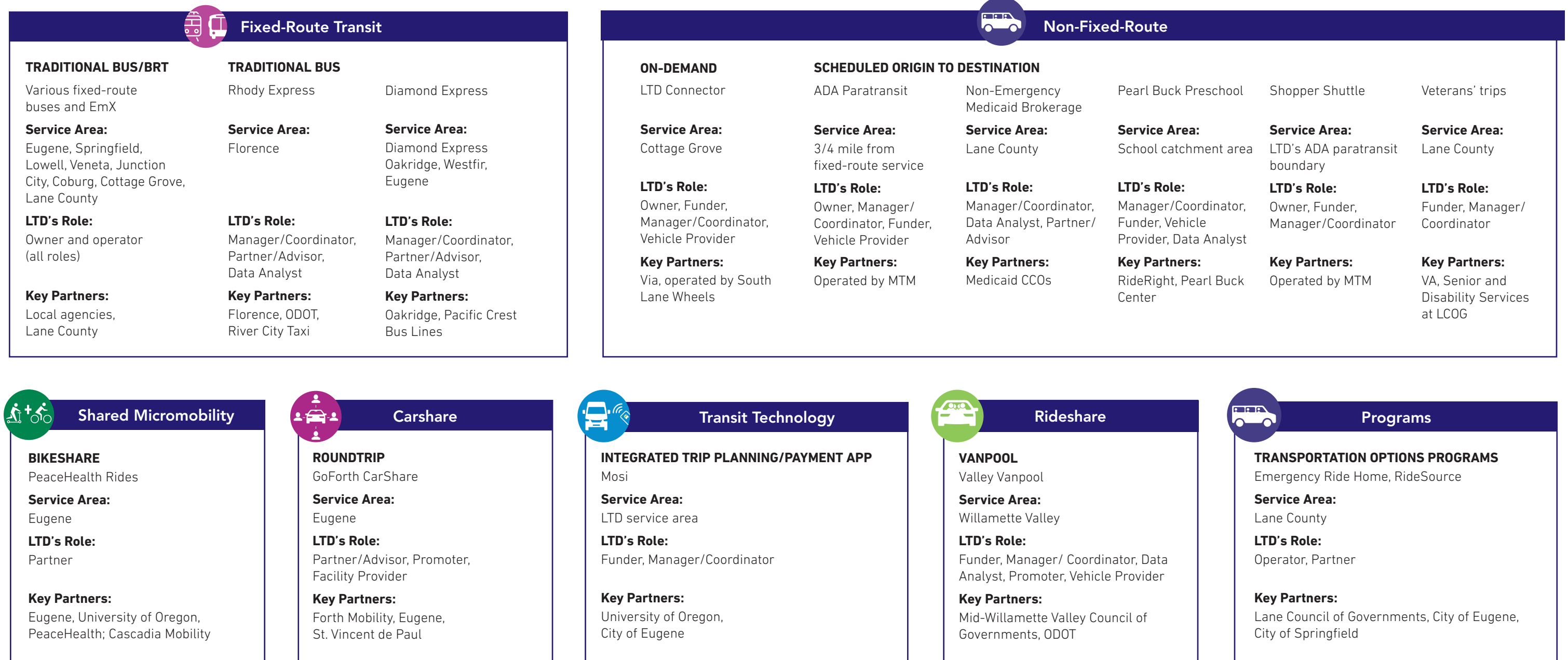
As the largest transit provider in the region, LTD maintains technology and staff that other providers lack. These include capital investments in fare collection, automated passenger counters, and trip planning software, but also staff with expertise in planning and transit technology. LTD also maintains one of the region's largest fleets of vehicles and has expertise in procuring a range of vehicle types. All of these assets mean that LTD is well equipped to manage the funding and grants that are required to implement complicated transit projects.

LTD has a long history of mobility management that stretches back decades. In various forms, it has been providing a variety of services that include fixed-route and demand response services since the early 1970s. LTD has experience delivering projects through a variety of different kinds of partnerships with governmental agencies, non-profits, and private sector partners. Perhaps most importantly, LTD is a public sector agency whose mission is "connecting the community."



Link Lane provides bus service such as the Eugene-Florence Connector

Figure 2: Examples of LTD's participation in regional mobility programs and services



How the strategy was developed

This strategy was developed through technical work combined with community engagement and conversations with stakeholders.

Community engagement

Broad public outreach focused on understanding gaps and needs based on the current mobility offerings in the region as well as assessing interest in new modes to fill those gaps. These activities included:



A community survey, which received 257 responses.



Focus groups targeting historically marginalized communities, organizations focused on businesses and visitors, and groups working with youth, seniors, and people with disabilities.



A Spanish language radio interview.



Planner “office hours” where community members could drop in and learn about the project.

LTD conducted targeted stakeholder outreach focused on governmental agencies, rural communities, and strategic partners such as universities and transportation non-profits. Many of these stakeholders were also represented on a Technical Advisory Committee.

A key part of this project was also to interview key staff within LTD to understand how LTD is currently performing as a mobility manager and what would be necessary to continue to innovate and provide new options to the community. These internal stakeholders provided valuable insight on internal processes that helped to develop a decision-making framework that will be used to ensure LTD is implementing mobility management in a sustainable, efficient manner.

As LTD implements the Mobility Management Strategy, the community and stakeholder feedback will continue to inform project development, partnership formation, and LTD’s direction as we work towards a more connected community.

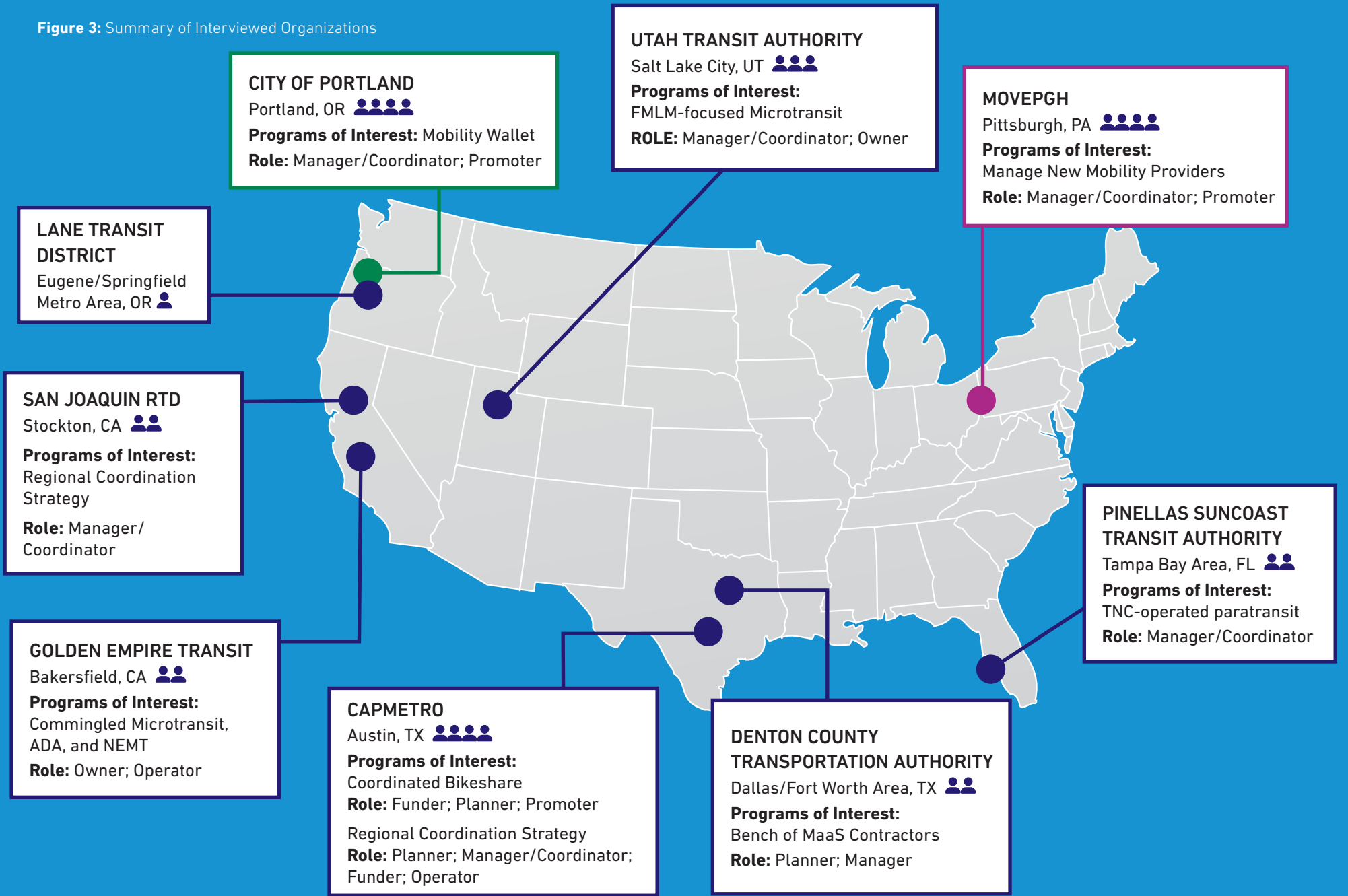
Community engagement conducted as part of this project is summarized in a Community Outreach Summary on the Mobility Management section of LTD’s Website (<http://www.ltd.org/mobility-management>).

Experience of peer agencies

LTD conducted interviews with peer agencies and developed case studies to better understand the state of mobility management and apply these lessons in the local context.

LTD conducted interviews with nine peer agencies who are working on a variety of project types. They revealed different approaches and visions for mobility management in each region, but an overall theme was that transit agencies across the country are finding this work essential to improving mobility in their communities. Many of the agencies working on mobility management are in more populous regions than LTD, however, the lessons learned in these larger communities are still applicable to Lane County and the Eugene-Springfield metropolitan area.

Figure 3: Summary of Interviewed Organizations



Analysis of mobility needs and gaps

In addition to asking the community about challenges and barriers in the existing mobility services, LTD conducted a data-driven analysis of where there are gaps in the transit system and analyzed service quality for different demographic groups and employment categories. This data was used to inform this strategy and will continue to be used as LTD seeks to implement mobility management projects in the future. A full summary of the findings can be found in the Needs Assessment conducted as part of this project on the [Mobility Management section of LTD's website](#).

Increasing access for traditionally under-served populations, people with specific mobility needs, and to low- and medium-wage jobs can help LTD achieve its mission of connecting the community.

Some of the groups identified as having specific mobility needs included:

- College students
- Shift workers
- Rural residents
- Older adults
- Youth
- People with disabilities
- People without access to smartphones and technology
- Non-native English speakers
- Low-income populations
- Households without vehicles



RideSource is LTD's paratransit service providing door-to-door transportation for people unable to use fixed-route buses due to a disability

Key components of the strategy

Mobility management can help LTD fill gaps in service

New services and modes generally target spatial gaps in the system or specialized services gaps. Spatial gaps are the physical places in the system that are currently unserved or underserved by transit. Many agencies are experimenting with using microtransit, micromobility, and partnerships with other providers to provide services in areas that don't support traditional transit service, often to connect to more frequent transit services nearby.

Specialized services are focused on specific communities, such as those with disabilities, low-income riders, or another group. These services are often not open to the broader public and are designed to meet specific needs in the community. Many agencies are exploring new types of partnerships to deliver their specialized services. Others have used technology and consolidation of programs to provide a better customer experience on their existing services.

LTD has extensive experience developing services to meet both kinds of service needs. For example, LTD contracts service on behalf of rural communities like Oakridge and Florence and provides a flexible, on-demand service within Cottage Grove. Similarly, the RideSource call center provides a single point of contact for customers enrolled in a wide array of specialized programs. LTD brokers trips on a fleet of LTD-owned vehicles and private providers based on eligibility and need. From the customer's point of view, a single point of contact provides access to a wide variety of programs for those who are eligible.

There is public interest in LTD filling service gaps

Community members who provided feedback on the project's survey indicated a variety of gaps. The exact nature of what was missing varied based on demographics, trip needs, and where a person lived. However, two themes were common in what LTD

heard from the public. The first is that more services are needed, regardless of whether the need is more frequency on existing routes or new services where transit doesn't currently exist or otherwise meet the needs of a given person. The second common theme is that people want to see LTD offer services beyond traditional, fixed-route buses. Feedback included many different ideas for which new services would best meet the community's varied needs, but a desire to see new options was common.

Different modes are appropriate for different contexts

Lane Transit District is comprised of a variety of different types of communities. For LTD to effectively serve all of these, a variety of solutions are necessary based on the needs, location, and way that the communities are built. Each type of area presents different opportunities and challenges.

Transit opportunity areas

Transit opportunity areas are places that are currently within one half mile of frequent or semi-frequent transit. These areas are concentrated in the urban areas in Eugene and Springfield. About 41% of the population of Lane Transit District live in these areas.

The most effective investments to improve mobility in Transit Opportunity Areas are investments in more fixed-route bus service including increasing the frequency and time span of existing routes. This is also essential to making a useful network that allows connections with other modes.

First mile/last mile opportunity areas

For the 29% of the community who live too far to walk to transit, but close enough for it to be useful, better options to connect to the fixed-route network are needed to improve their access. First and last mile options will improve people's ability to travel within their neighborhoods and connect to frequent, reliable fixed-route transit that will provide them access to destinations farther away.

As shown in Table 1, this group could be served by new fixed-route service or with more flexible options such as microtransit, micromobility, carsharing, etc. Personal preferences, trip purpose, neighborhood context, comfort and ability means that LTD will need to be flexible and explore a range of first and last mile options for any given area. LTD should work with the public to determine the best ways to connect them to other transit options.

Increases in the frequency and time span of the fixed-route network will also benefit this group once they are able to access this network.

Supplemental Service Opportunity Areas

Approximately 30% of LTD’s population live farther than 3 miles from frequent or semi-frequent transit service. People in these areas are primarily in smaller, rural communities outside of Eugene and Springfield or in unincorporated rural areas.

Some of these communities have lifeline or commute-oriented transit service that connects to the metro area. These services provide a valuable connection, but do not meet most people’s needs. Long trip distance, lower population and job densities, and other factors mean that programs and services that are more targeted to specific needs will be necessary to improve mobility.

Meeting the needs of people in rural areas presents a variety of challenges and LTD should explore multiple options depending on the type of community served. For example, within smaller communities microtransit may expand access to opportunities within the community, while vanpools and carsharing can provide connections outside of the community. In unincorporated areas, options like pre-scheduled dial-a-ride might be necessary to effectively connect residents to where they need to go.

Fixed-route transit is the backbone of LTD’s mobility management efforts

Filling service gaps may mean using new tools like shared micromobility or flexibly routed transit, however, the backbone of the system will always be fixed-route transit service. A frequent, reliable fixed-route transit system is essential to creating a useful mobility network. It is

the most cost-effective way to provide transportation – especially along higher-density corridors, connecting to and from major destinations, and for longer-distance trips that would be challenging to walk or bike. Nevertheless, the economics of fixed route transit are such that LTD cannot effectively serve the entire population within its district with only that mode of shared mobility.

Non-fixed-route and on-demand services such as microtransit, micromobility, and other modes can work well in lower-density areas, where demand is moderate, and to create an additional mobility option where fixed-route transit doesn’t come as frequently. However, these services are most effective when operating as first- and last-mile connections that extend the reach of fixed-route transit and increase the accessibility provided to parts of the region where transit either isn’t available or is provided in lower frequencies. Fully implementing the region’s frequent transit network is the best way to provide longer-distance connections and get the most out of more flexible origin-destination type services.



LTD was a partner in piloting the EmGo electric vehicle carshare program.

Table 1: Opportunity areas for new mobility options

Transit Network	Opportunity Area	Catchment	Population Covered ¹		Jobs Covered		Options for Improved Mobility
			All	TDC ²	All	Low-Wage ³	
Frequent Transit Network 15-minute or lower headways from 7–9 AM and 4–6 PM	Transit Opportunity Area	0–0.5 miles	19%	19%	37%	37%	Sidewalks, crossings, lighting, bike infrastructure
	First- and Last-Mile Opportunity Area	0.5–3 miles	43%	43%	45%	43%	Micromobility, demand-responsive community shuttles, subsidized TNCs
	Supplemental Service Opportunity Area	> 3 miles	38%	38%	18%	20%	Carpooling, vanpooling, ridesourcing, ridesplitting, carsharing
Semi-Frequent Transit Network 16- to 30-minute headways from 7–9AM & 4–6PM	Transit Opportunity Area	0–0.5 miles	33%	39%	50%	53%	Sidewalks, crossings, lighting, bike infrastructure, service frequency changes
	First- and Last-Mile Opportunity Area	0.5–3 miles	31%	29%	33%	28%	Micromobility, carsharing, demand-responsive community shuttles, subsidized TNCs
	Supplemental Service Opportunity Area	> 3 miles	36%	32%	17%	19%	Carpooling, vanpooling, ridesourcing, ridesplitting, carsharing
Off-Peak Transit Network 30-minute or lower headways during off-peak hours	Transit Opportunity Area	0–0.5 miles	41%	48%	59%	63%	Sidewalks, crossings, lighting, bike infrastructure, service time changes
	First- and Last-Mile Opportunity Area	0.5–3 miles	29%	25%	26%	20%	Micromobility, carsharing, demand-responsive community shuttles, subsidized TNCs
	Supplemental Service Opportunity Area	> 3 miles	30%	27%	15%	17%	Carpooling, vanpooling, ridesourcing, ridesplitting, carsharing
Lifeline Transit Network 30-minute or more headways or infrequent service	Transit Opportunity Area	0–0.5 miles	23%	28%	39%	43%	Sidewalks, crossings, lighting, bike infrastructure, service time changes
	First- and Last-Mile Opportunity Area	0.5–3 miles	59%	58%	57%	52%	Micromobility, carsharing, demand-responsive community shuttles, subsidized TNCs
	Supplemental Service Opportunity Area	> 3 miles	18%	14%	4%	4%	Carpooling, vanpooling, ridesourcing, ridesplitting, carsharing

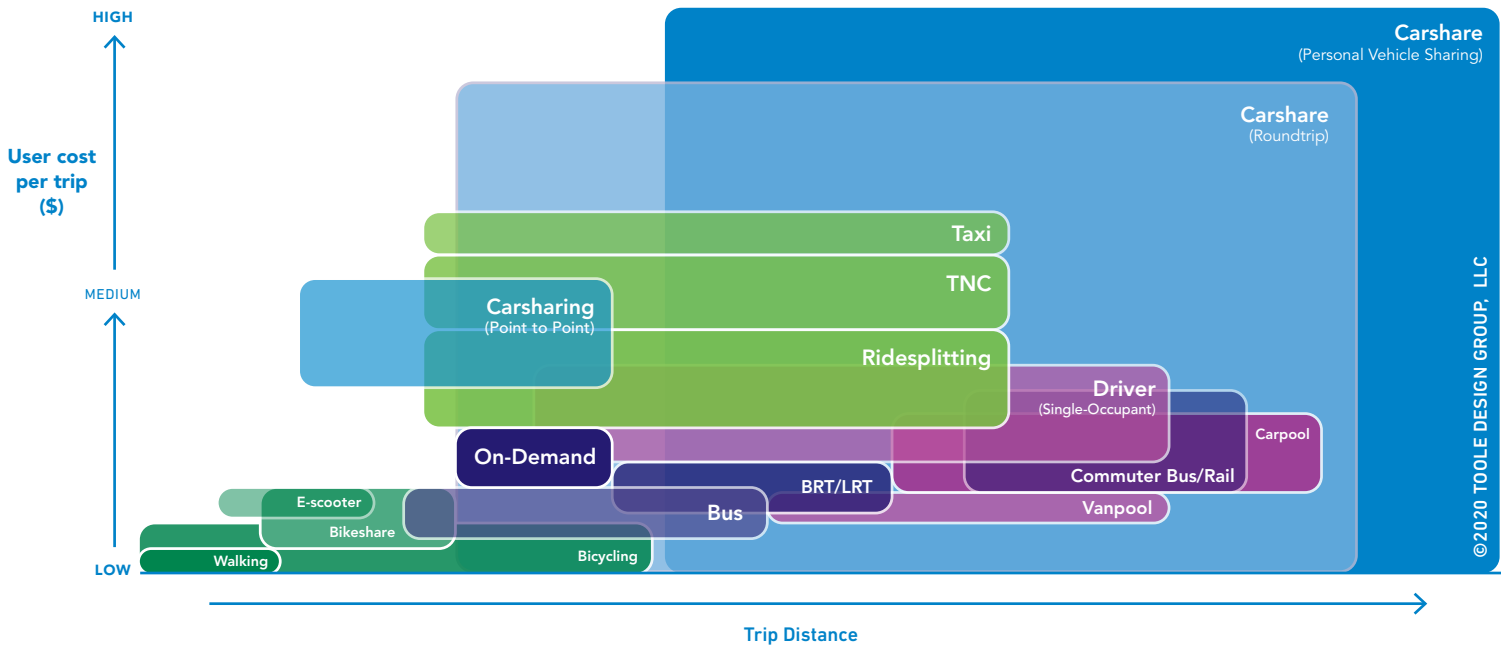
¹ Number of residents or jobs within the specified catchment area measured from transit stops

² Transportation Dependent Communities (TDCs) defined as households with incomes below 200% of the Federal Poverty Level

³ Low-wage jobs defined as those earning \$1,250 per month or less

Figure 4: Trip distance and cost effectiveness of different modes

Urban Transportation Spectrum



LTD has many opportunities to explore

LTD’s research identified some of the current tools available today. A sample of them is provided below. Some are new tools and some are available in the region today but have room for expansion or partnerships to improve access and better integrate with other options.

Lane County has several mobility providers, many of whom already partner with LTD. In stakeholder interviews, many providers and communities expressed an interest in expanding existing partnerships with LTD and working on new partnerships.

As the transportation landscape continues to evolve, LTD will need to continue exploring and investing in new technologies and ways to deliver service.

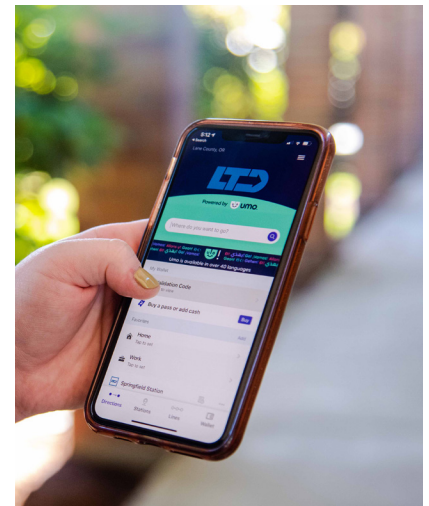


Table 2: Potential Mobility Programs and Services

Program	Description	Target Groups
Mobility Wallet	A mobility wallet could provide access to a range of affordable transportation options and reduce the need for auto-ownership.	College students, shift workers, low-income households, households without automobiles
Shared Micromobility Expansion	Expansion of the PeaceHealth Rides program or introduction of dockless e-scooters to serve a larger footprint or new communities.	College students, low-income households, households without automobiles
E-Bike Lending or Subsidy Program	Improved bicycling infrastructure could open opportunities for micromobility expansion or e-bike lending or subsidy programs. A specific opportunity could be an e-bike lending program at LCC once a bicycling connection is made via 30th Avenue.	College students, shift workers, low-income households, households without automobiles
Partnerships with TNCs	Partnering with ride-hail companies to fill temporal service gaps with subsidized trips outside of transit service hours; or to provide on-demand paratransit trips.	Shift workers, people living with disabilities
Microtransit	Microtransit services providing more flexible or door-to-door service (such as the Cottage Grove Connector).	Older adults, rural residents, people living in lower-density neighborhoods
Low-Income Discount and Eligibility Management Programs	Work with mobility providers to offer discounted fares for low-income individuals. This should be offered through a common eligibility program, e.g., LTD's existing partnerships with nonprofit organizations.	Low-income households, intersecting populations in other groups
Traditional or Electric Vehicle Carshare Programs	Programs that provide occasional access to a vehicle without having to invest in ownership may help to address infrequent needs to run errands, transport larger goods, to visit appointments, etc.	Households without automobiles
Technical Support or Grants	Program to provide funds, planning support, or a regional bench of on-call mobility services that smaller agencies can access when wanting to implement new mobility services and programs.	Rural / small town residents
Volunteer Driver Program	Programs that provide transportation services to passengers by engaging volunteers to serve as drivers. Some models reimburse drivers for their time or mileage, some allow time to be banked for future use, and others use non-reimbursed volunteer drivers.	Rural residents, people living with disabilities
Mobility Hubs	Mobility hubs consolidate a variety of mobility services at one location to provide transportation redundancy and reliability but can also be key locations for public wifi, integrated ticketing, and cash-payment options (in partnership with nearby retailers).	People with limited access to computers, internet, and banking, households without automobiles

LTD should play a key role in facilitating the development of a broader spectrum of mobility for the region

Stakeholder interviews highlighted the need for technical assistance and support at smaller agencies and providers. As the largest mobility provider in the region, LTD has achieved a scale of operations that can allow it to offer consulting and technical assistance to other agencies. Examples of this kind of assistance could include providing vehicles, technology, administrative or planning support, grant assistance, and regional integration of services. LTD should explore how to expand the amount and range of support it provides to other agencies.

Providing technical assistance to smaller agencies and providers gives them access to opportunities they may not otherwise be aware of or able to access. LTD will need to develop processes and expertise to fully capture the costs of providing assistance to other providers.

LTD's Decision Making Framework

A key part of this project was to develop a decision-making framework that LTD can use to make conscientious and consistent decisions on its role in new mobility project, programs, and services. Staff developed a decision-making framework that analyzes the benefits, opportunities, and challenges of new initiatives; evaluates the impacts of different roles on the organization; and identifies potential partners to engage with.

LTD should look at mobility initiatives that meet the opportunities shown in Figure 5.

Figure 5: LTD can and should play a key role in mobility initiatives that have local community interest, fill a mobility need or have strong public support, and fit within the mission and resources available to LTD.



Piloting projects is an important way to test their effectiveness

The transit industry is increasingly relying on pilot projects to assess new technologies. Pilot projects allow agencies like LTD to test new service delivery models and adapt services based on data. Staff developed a pilot program guide to provide structure to the pilot process including clearly defining the goals and objectives of the pilot at the outset and developing an evaluation framework that will allow LTD to evaluate the pilot's effectiveness and determine if and in what format it continues long-term. This is an approach supported by the Federal Transit Authority (FTA) through initiatives such as their Mobility on Demand Sandbox program.⁴

Next steps for LTD as a Mobility Manager

LTD has an opportunity to be a leader in mobility management

LTD's position as a regional transportation provider, scale of operations, access to resources, and experience and staffing to manage a wide variety of projects provides a unique opportunity to take a lead role in mobility management. LTD should consider ways to leverage these attributes to benefit LTD as an organization and improve mobility outcomes in the region.

Agree on a clear agency mission for mobility management

LTD is already a mobility manager. LTD should agree on a clear organizational direction for mobility management and create internal messaging and external alignment with local and regional stakeholders. LTD should work with these stakeholders to apply the decision-making framework to determine the best role for LTD and its partners to implement new services.

Build mobility management into the organizational structure

LTD should formalize where new mobility services and programs live within the organization. Currently, Accessible Services is the home for many programs. Regardless of where they live, during piloting and implementation, additional resources may be needed by various departments to build robust mobility management programs. This could include hiring staff, procuring new resources, or paying for management or operation of these programs.

Institutionalize and implement the mobility management decision-making framework

LTD needs to create internal understanding and institutionalize the mobility management decision-making framework to evaluate new mobility services and programs. The framework provides a consistent, coordinated, and transparent way to evaluate potential impacts, long-term management needs, the full cost of a project, and the most appropriate role for LTD. LTD must incorporate the strategy into its internal processes and empower staff to champion projects using the decision-making framework.

Mobility management should be embedded within future planning processes including comprehensive operations analyses, LTD's Strategic Business plan updates, and other long-range plans.



⁴ Information on the FTA's Mobility on Demand Sandbox program: <https://www.transit.dot.gov/research-innovation/mobility-demand-mod-sandbox-program>

Identify mobility services that address the primary needs of the community

LTD should work with its partners to identify and prioritize mobility projects, programs, and services that can address the needs and gaps identified in the Strategy and increase access to housing, jobs, services, and other opportunities for groups identified as having specific mobility needs including:

- College students
- Shift workers
- Rural residents
- Older adults
- Youth
- People with disabilities
- People without access to smartphones and technology
- Non-native English speakers
- Low-income populations
- Households without vehicles

LTD should actively explore filling spatial and specialized services gaps with new mobility projects, programs, and services alongside fixed-route transit, using the best mode for the goals of the project. New mobility options provide an opportunity to complement fixed-route transit services by providing first/last mile connections that extend the reach of and support fixed-route transit operations.

Continue to explore partnerships and new sources of funding

Partnerships with local, regional, and state agencies, private sector mobility providers, and community-based organizations can provide access to an increased range of funding sources.

Private sector partners, contractors, and vendors are critical in reducing the burden on agency partners and bringing new technologies, established expertise, scale of service, and additional funding.

Be a consultant for other partners in the region

LTD can serve partner organizations in moving forward mobility services and programs by leveraging their access to resources. In particular, LTD can be a resource to smaller communities and unincorporated Lane County where staff capacity is limited. Some examples of support could include funding, procurement, grant writing, planning, compliance, etc.

To do this effectively, LTD needs to develop processes to fully capture the costs associated with providing services to other agencies and sharing their learnings. If LTD is successful as a consultant for other local agencies, it can create economies for LTD to spread its costs for these activities across a broader array of programs and provide cost-effective access for other partner agencies to benefit from the technology, expertise, and services built up by LTD.

Continue to develop pilot projects

LTD must continue to pilot new mobility services in an organized and consistent manner with clear objectives and performance metrics. To do this successfully, LTD should dedicate funding and seek grants that are specifically for pilot projects. Consideration should be given to whether and how projects continue, however, dedicated funding will allow LTD to continue to experiment with what will work with the local community and how those programs can be delivered by LTD and local partners.

Develop research partnerships with local universities

LTD has access to several leading research institutions such as the University of Oregon, Oregon State University, Portland State University, Lane Community College, and others. LTD should lean on partnerships with research organizations to evaluate pilot programs, monitor long-term programs, and provide a resource clearinghouse for shared learning.



LTD Mobility Management Strategy

May 2023



Mobility Management Decision-Making Process

May 2023



New mobility options such as bikeshare have the potential to increase mobility in the region and extend the reach of transit. LTD is a founding partner of the PeaceHealth Rides bikeshare program.

New ideas for mobility projects, programs, and services come to LTD from external partners, internal staff, decision-makers, and other places. These initiatives can enhance the fixed-route transit network and increase access to mobility – especially for populations that are hard-to-reach, have mobility challenges, or are currently underserved by existing options. However, they also need to be considered in terms of LTD’s financial and organizational capacity and the appropriate role for LTD to play.

As part of the Mobility Management Strategy, LTD developed a decision-making framework that provides the organization with a more consistent, coordinated, and transparent approach to deciding their involvement in new mobility initiatives. The framework helps staff and decision-makers assess the potential benefits, costs, and implementation needs of a new mobility initiative; determine if the initiative furthers LTD’s mission, values, and goals; and identify what role LTD should play.



LTD is best suited to play a key role in mobility initiatives that have local community interest, fill a mobility need and fit within the mission and resources available to the organization.

Assessment Process

As potential projects, programs, and services come to LTD for consideration, planning or other staff interested in the idea guide the initiative through a preliminary assessment with input from impacted departments and consultation with external partners. The assessment helps to weigh up the potential benefits and tradeoffs for new mobility initiatives. This could include evaluating feedback on the alignment of the initiative with LTD’s strategic goals, whether it supports existing service, how the initiative does or doesn’t serve transit-dependent or historically underserved populations, other potential equity impacts, and how well the initiative supports or enhances existing service.

A recommendation on potential roles and involvement for LTD and its external partners are determined from the assessment along with next steps for the initiative. Potential roles in new mobility initiatives are shown at the end of the document.

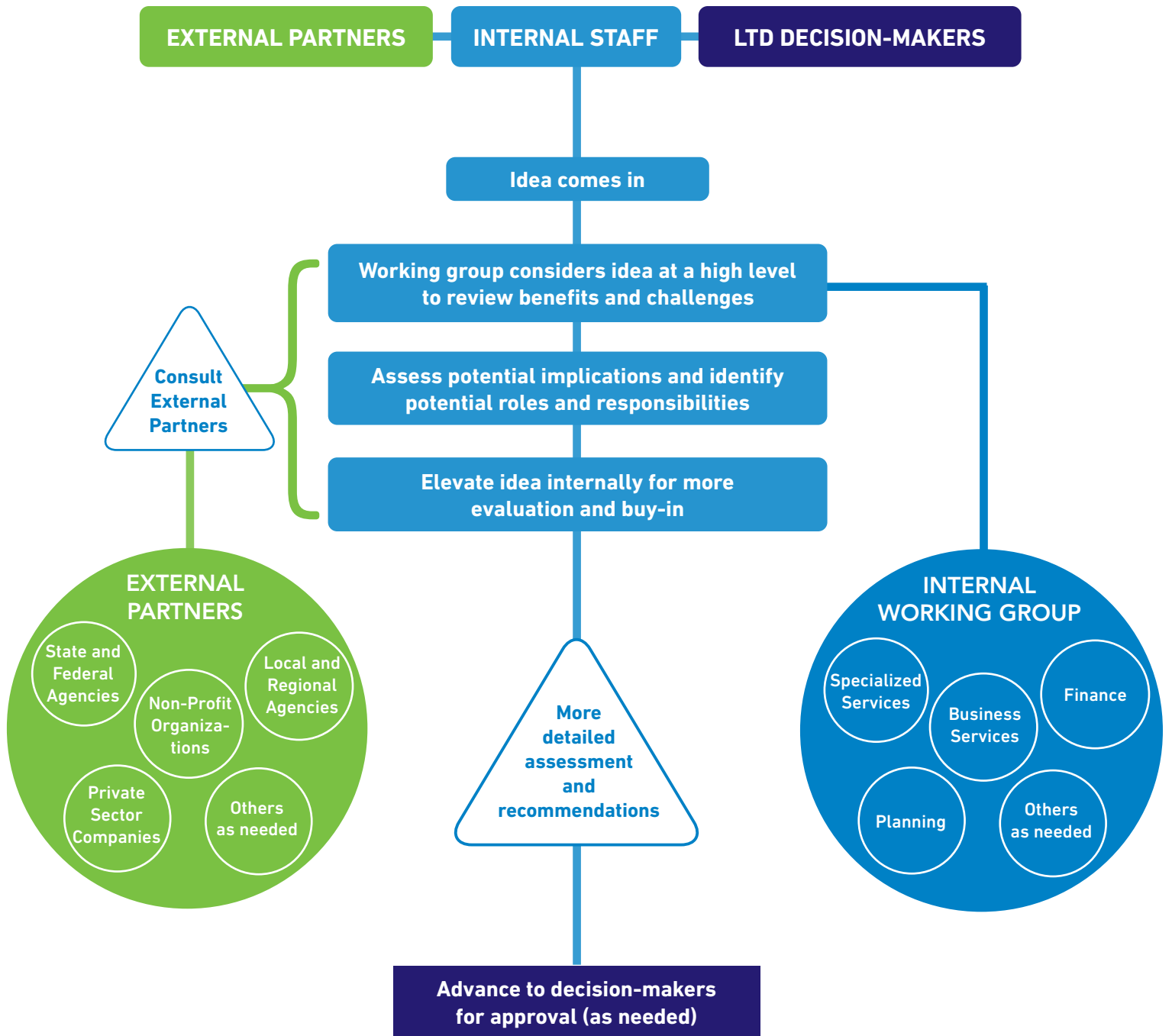
The framework is intended to have a certain amount of flexibility so that decisions can be made at the appropriate level with staff empowered to make decisions that fit within the strategic plan or support existing service and elevating decisions that need to be approved by the Executive Office and/or the Board.

The decision-making framework generally follows the process outlined on the next page with feedback loops to further evaluate or refine ideas as they move through development.

Once an initiative is approved to move forward, it is transitioned – either internally to the appropriate LTD department if LTD is identified as playing a key role in owning, operating, or funding the initiative – or externally to the partner agency that is taking the lead. The lead agency is responsible for developing an implementation plan and working with other organizations and the private sector to implement the initiative.

An outcome of the decision-making framework could be to establish a pilot program as a means of testing the initiative before committing to a full-scale program. This gives decision-makers and the public a chance to see new programs, services, and technologies in action and to better understand their benefits and impacts. LTD has developed a set of pilot program guidelines that can be used to better plan, implement, and evaluate limited-scale tests of new initiatives to determine their long-term potential.





LTD's Mobility Management Decision-Making Framework provides a consistent way to evaluate the role of LTD and other partners in new mobility initiatives.

Mobility Management Roles and Responsibilities

The following is a preliminary list of roles and responsibilities associated with mobility management. These roles could be filled by local, regional, and state agencies, non-profit organizations, private businesses, etc. One role may be filled by multiple organizations. Similarly, one organization may play several roles and may play different roles for different services.

OWNER:

Maintains ultimate responsibility and liability for the program or service and associated assets. Responsible for ensuring that all roles are filled.

MANAGER / COORDINATOR:

Leads day-to-day and long-term management, may include contracting, collecting and dispersing funds or services, and administrative responsibilities.

FUNDER:

Provides funding for a service or program. Level of funding is irrelevant. Only refers to monetary contributions, does not include staff time or in-kind contributions.

PLANNER:

Provides critical support for a program or service, such as assessing feasibility, or trip or route planning.

OPERATOR:

Responsible for on-the-ground service delivery; could include service deployment; fleet and equipment maintenance; recruiting, training, and overseeing drivers; fare collection; rebalancing micromobility devices, etc. May be responsible for collecting customer or trip-related data.

TECHNOLOGY PROVIDER:

Provides software or other technology needed to operate a program or service. This is typically relevant for services that require routing, trip planning, or fare collection.

VEHICLE PROVIDER:

Provides “vehicles” including shuttles, vans, buses, bikes, e-scooters...etc.

PARTNER / ADVISOR:

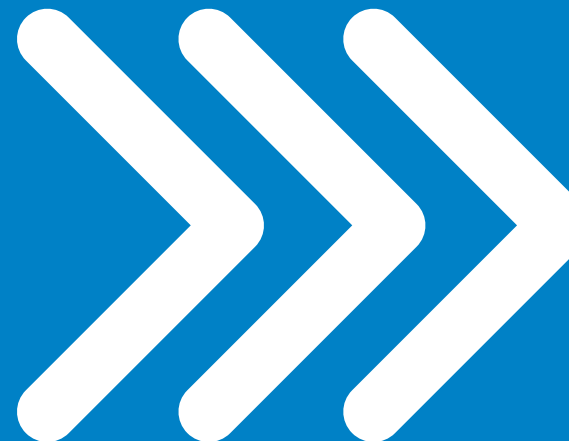
Provides strategic input or support during key milestones of programmer or service planning or evaluation; could include helping with specific tasks such as permitting or station siting.

DATA ANALYST:

Analyzes customer, ridership, trip, and other data to report key performance metrics to funders, stakeholders, or community members, or uses data as part of academic research. The analyst does not make decisions about the future of a program or service.

PROMOTER:

Raise awareness of existing service or program to potential customers, could include marketing and community outreach to the public or specific populations.





Pilot Program Implementation Guide

May 2023



CONTENTS

Introduction 1

Stage 1: Planning 6

Stage 2: Implementation.. 10

Stage 3: Evaluation 11

Peer Agency Programs 12

Introduction

This guide provides a framework for Lane Transit District (LTD) and its partners to plan and implement effective pilot programs that can be used to test and evaluate new services, programs, and technologies. Drawing on industry best practices and LTD’s previous experience running pilot programs, the guide will help implement LTD’s Mobility Management Strategy (MMS).

Why Pilot?

The transportation industry has seen significant change and investment in new mobility services, programs, and technologies that have the potential to increase mobility, advance sustainability and equity outcomes, and create efficiencies in service delivery. Most of these initiatives are different from traditional transportation services and some are relatively unknown or untested. As a result, public agencies have found themselves asking how to test the effectiveness of these initiatives whilst maintaining customer satisfaction and practicing responsible governance.

The scale of a pilot is generally limited – this could be in terms of its coverage area, the number of vehicles available, its times of service, etc. Pilots are also intended to be temporary with an evaluation process to determine whether the program should be adapted and repiloted, permanently implemented, transferred to another agency or organization, or discontinued.

A pilot is a scaled deployment of a new program, service, or technology to test their performance towards a defined set of goals.

Examples could include piloting a microtransit system to determine if it increases ridership and decreases the cost to transport residents in low-density areas compared to fixed-route transit, or whether a shared micromobility system is an effective first- and last-mile connection to transit, or whether a carshare program allows better access to jobs and services for low-income, car-less individuals.

Pilots give decision-makers and the public a chance to see new programs, services, and technologies in action and to better understand their impacts. Many pilots are created to manage risks before committing to broader deployment that would require additional resources and be more difficult to reverse. They often involve a significant outreach process to understand public perception and gather feedback on program changes that may be necessary to address public concerns.¹

¹ Zipper, D. (August 2020). Policy Brief – Urban Mobility Pilots. Harvard Kennedy School – Taubman Center for State and Local Government. Accessed from: <https://www.hks.harvard.edu/centers/taubman/publications/policy-briefs>

Connection to LTD’s Mobility Management Strategy

LTD’s Mobility Management Strategy includes a decision-making framework that will be used to establish the need for the pilot program and determine LTD’s role in supporting new services, programs, and technologies that can further the organization’s goals and improve mobility options in the region.

While implementing the Mobility Management Strategy, LTD will be working to deliver new programs and services that will help connect the community. For many new services a pilot program will be how LTD can test the initiative before committing to a full-scale program to ensure that it meets the community’s needs. This guide should be used to plan, implement, and evaluate pilot programs and can also be shared with partners in the region to inform their pilot programs.

LTD’s Experience with Pilot Programs

LTD has previous experience with pilot programs, but to date has never had any formal guidelines to ensure that pilots are implemented in a deliberate and consistent way. Successful pilots clearly articulate the goals of the program, outline the planning and implementation process, and create an evaluation process that can be used to decide whether to make the program permanent, adjust and continue the pilot, transfer the program to another agency or organization, or discontinue the program.

For more information on the Mobility Management Strategy and decision-making framework, visit www.ltd.org/mobility-management.



Míocar is an electric vehicle carsharing pilot program located at affordable housing complexes in the San Joaquin Valley. Source: <https://www.westerncity.com/article/new-clean-mobility-options-roll-out-arvin>

EmGo

In August 2019, LTD began a one-year electric mobility-on-demand pilot in Downtown Eugene called EmGo. LTD was a funder and technical advisor but implementation was through a partnership with the City of Eugene, Lane County, and the Lane Council of Governments (LCOG). The initial twelve-month pilot provided free service within the downtown area where customers could book trips between over 70 virtual stops using a third-party mobile application.

Status:

The service was suspended indefinitely in March 2020 due to the COVID pandemic and the pilot period concluded in August 2020. Based on low performance in a number of metrics including low ridership, high cost of service, low efficiency, and COVID-19 impacting vehicle load limits, staff recommended that the pilot project be discontinued.

Roles:

- **LTD:** funder, technical advisor.
- **LCOG:** manager, planner.
- **Lane County:** funder.
- **City of Eugene:** funder.
- **Ride Zero:** operator.

Lessons Learned:

This pilot was impeded by a few challenges including requiring the use of a mobile web-app, the large number of stops in a small service area, and the service competing with walking trips in a relatively small service area. These challenges resulted in low boardings per vehicle which meant a higher cost per rider.



LTD Connector – Cottage Grove

The LTD Connector is a mobility-on-demand service being piloted within Cottage Grove and connected to LTD's Route 98 to Eugene. It is owned and managed by LTD utilizing vehicles and technology procured from a third-party vendor, Via, and operated through a contract with South Lane Wheels.

The LTD Connector vans are equipped with 10 seats and two wheelchair bays and can be booked using a mobile app or through a phone call. The service runs Monday to Friday between 9:00 AM and 4:00 PM and costs \$1 per trip, that must be paid in cash.

Status:

LTD is in the process of evaluating the pilot project and determining next steps. LTD has secured funding to continue the pilot through at least July 2025.



Roles:

- **LTD:** owner and manager.
- **South Lane Wheels:** operator.
- **Via:** third-party technology vendor.

Lessons Learned:

This pilot is an example of testing a new mobility service that is similar to LTD's existing services but with a different combination of vehicles, technology, and third-party resources and expertise. The service provides useful intra-community mobility that fixed route service cannot provide due to route design or low frequencies. The mobility-on-demand service is more expensive than fixed route, but less expensive than traditional demand responsive services due to a combination of the efficiencies created by scheduling rides in real-time and the partnership delivery model. The service has also shown higher efficiency and productivity levels (pre-COVID) compared to microtransit services in peer communities.² The pilot also found that the service did not connect well to fixed route transit due to the variability in travel time on the route.

² Card, J. The LTD Connector: Evaluating the Effectiveness of Mobility-On-Demand in Cottage Grove, Oregon.



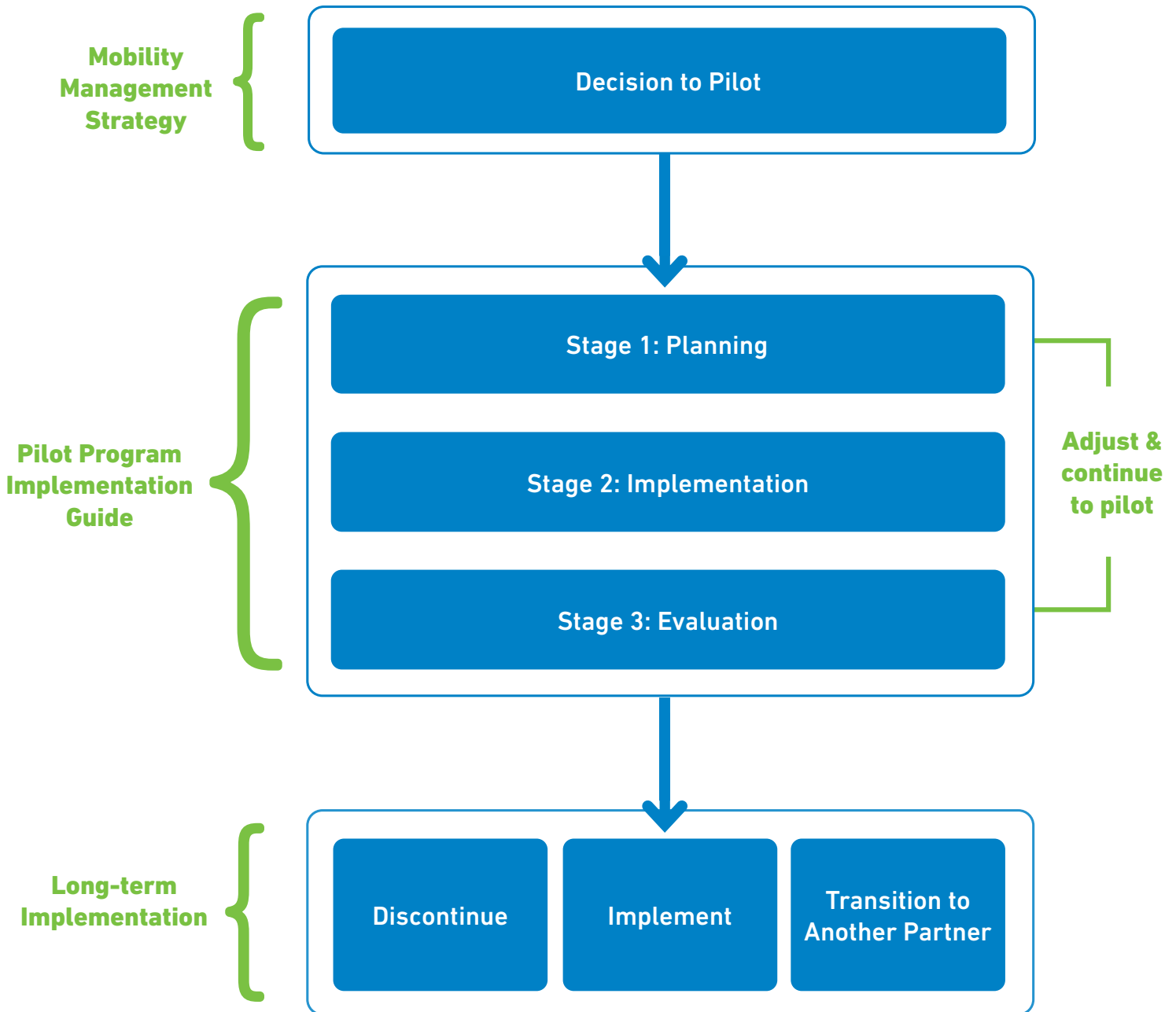


Pilot Program Process

The most effective pilot programs are those that follow a clear process starting with a planning stage to establish the goals of the pilot, a well-managed implementation plan, and a framework for evaluating the pilot and making decisions about its long-term future. It is also important to keep enough flexibility to adjust and refine the program as needed, especially in reaction to unexpected benefits or service issues.

This process is outlined in Figure 1 and this document describes each of these steps in more detail.

Figure 1: LTD's Pilot Process



Stage 1: Planning

The decision to pilot a mobility initiative should be made using the Mobility Management Strategy's decision-making framework. The planning stage should be used to establish goals for the program, better define the roles of LTD and its public, private, and non-profit partners, identify the resources needed for the pilot, and identify other actions needed for implementation.

Stage 1 activities include the following steps, many of which are related to one another and will need to occur concurrently.

Confirm Organizational Model and Roles

This step institutes the recommendations from the MMS decision-making framework and includes transferring responsibility for the pilot program to the LTD department identified as playing the Manager / Coordinator role and identifying a Project Manager to lead the development of the program and organize other departments and organizations in their roles.

- **Transition ownership and identify a project manager.** Based on the approved recommendations from the MMS decision-making framework, the pilot program should be transferred to the appropriate department within LTD that will manage / coordinate the program and identify a project manager that will lead the planning process on behalf of the organization.
- **Internal coordination.** The project manager should coordinate with key staff within the LTD departments identified as playing supporting roles in the pilot program. This will include introducing the project, identifying the project's needs, and working within the organization to build capacity, procure resources, coordinate on compliance and funding issues, etc.
- **Determine partnership agreement, contracting, and procurement needs.** The organizational model recommended for the pilot could include establishing partnerships with other public agencies, non-profit organizations, research institutes, etc. The project manager will need to work with LTD's Business Services department to identify the appropriate form of agreement to work with these partners as well as the process for procuring any new vendors, resources, or services for the pilot.

- **External coordination.** For pilots that rely on partnerships with external organizations, the LTD project manager will need to reach out to confirm the roles and responsibilities for all external partners and work with them to formalize any agreements that are required. The contracting and approval process can take significant time and planning for this early will streamline implementation. The LTD project manager should also consider establishing an advisory group that brings together and coordinate the different partners.

Establish a Funding Model

Funding for the pilot may have already been identified or may need to be identified. Some potential funding sources are listed below. An important consideration is ensuring the eligibility of different funding sources and making sure that funding is secured for both capital and operations.

The funding timeline should also be considered, especially whether funding would still be available if the pilot timeline slips or is extended, or whether the same funding source would be available for long-term implementation of the program. This step also includes determining reporting and compliance needs tied to the funding source. Common funding sources for mobility pilots include:

- **Grants:** LTD can apply for federal, state, and local grants to support a mobility pilot. There are often restrictions on how funds can be spent, e.g., some grants can only be spent on capital. Grants often require some level of local match funding that will need to be found by LTD or other external partners. Examples of federal grants that support mobility pilots are the [Enhancing Mobility Innovation](#) program and [FTA's Accelerating Innovative Mobility \(AIM\) Program](#). Additional resources can be found [here](#).
- **Partnerships:** Many mobility pilots are established through public-private partnerships where each of the parties brings resources to its implementation. These models vary in their levels of public and private sector funding. In some models, a public agency will fund the program and procure equipment and

operations through a contract with a third-party vendor(s). In other models, the public agency allows the use of their infrastructure in return for a private sector partner operating and taking on the financial risk of the service. Funding under these models could also include public agency subsidies, private sector sponsorship, street advertising, philanthropic contributions, and partnerships with power-utility companies (e.g., for electric or solar infrastructure).

- **Post-implementation revenue sources:**

Revenues from the pilot could include user fees and fees charged to private sector vendors for use of public infrastructure such the right-of-way, curb space, parking spaces, or air rights. Pilot programs that are administered through a permit should develop a fee schedule to recoup some or all of the cost to administer the program.

Establish Goals and an Evaluation Framework

Arguably the most important step in the planning process is determining the goals for the pilot program and how it will be measured.

- **Develop a hypothesis.** Pilots should seek to answer a specific set of questions and the hypothesis should be easy to understand and measurable. Decision-making bodies such as the Executive Team, Strategic Planning Committee (SPC), and the LTD Board of Directors should be briefed so they are well versed on the point of the pilot program and the question(s) that LTD plans to answer.
- **Determine pilot program goals and performance measures.** Identifying the goals of the pilot and the performance measures that will be used to evaluate the program upfront allows LTD and its partners to critically assess the effectiveness of the pilot during the evaluation stage. Performance measures should be selected to help measure the hypothesis or questions the pilot is intended to answer. Agencies have used mobility pilots to advance a variety of different goals and policy objectives and some examples are shown on Figure 2.

- **Establish the parameters of the pilot.** This includes determining the scale, size, and timeline for the pilot. These decisions should be undertaken through appropriate consultation with internal and external stakeholders. Pilot parameters should be communicated clearly to the public throughout all phases of the pilot.
- **Develop a pilot schedule.** Once the parameters of the pilot are confirmed, the project manager can build out the pilot program schedule to identify milestones for implementation, program launch, outreach, data collection, evaluation, reporting, and decision-making.
- **Create a data collection, monitoring, and evaluation plan.** The plan should identify the source of any data needed to calculate the identified performance measures as well as key milestones for data analysis, reporting, and evaluation. The data collection plan should identify a clear strategy for transfer and storage of data and put in place any data agreements needed for data sharing. Requesting sample data or a template of the format of the data is useful in planning out data analysis.
- **Protect user and agency data.** LTD should develop policies and strategies to maintain the security of identifiable data. Defining data sharing agreements to protect individual data privacy and considering cybersecurity strategies while releasing data to the public are some practices that could address data sharing issues.



Figure 2: Common New Mobility Pilot Programs and Project Goals³

GOALS	Micromobility	TNC Partnerships	Microtransit	Passenger AVs	AV Delivery
Facilitate first/last-mile connections	X	X	X		
Improve mobility equity and access	X	X	X	X	
Access the viability of new technology	X		X	X	X
Gauge public interest	X				
Achieve environmental or sustainability goal	X		X		
Increase transportation options	X		X		
Fill service gaps/provide occasional or specialty trips		X	X		
Identify potential use cases				X	X
Test the technology				X	X
Be innovative/part of the new economy				X	X
Evaluate and improve safety outcomes	X				
Operate as a replacement for fixed-route service, especially in rural or sparsely populated areas		X			
Increase transit ridership			X		
Learn how city processes, policies, and programs may need to be adapted or AVs				X	

Initiate an Outreach and Engagement Strategy

Building awareness and obtaining feedback from the public is critical to the success or failure of a pilot program.

- Prepare a public engagement strategy.** Pilots are often implemented on a quick timeline which can make meaningful community engagement challenging. A detailed engagement strategy should be developed in coordination with external partners and vendors to identify the primary audiences, key milestones, and techniques that will be used. Engagement should inform stakeholders and the public about the program and provide opportunities for feedback. It should be conducted through all stages of the pilot. It is essential that the engagement strategy collaborate with vulnerable and historically marginalized communities to build trust and transparency between LTD and the communities they serve.
- Develop a marketing and communication strategy.** Building awareness of the pilot program is critical to its success. The marketing and communication strategy needs to clearly message the objectives and potential benefits of the pilot, why LTD is trialing the program, how it will be measured, any changes to existing service, how to use the program, opportunities to engage and provide feedback on the program, and the process for deciding the long-term outcomes of the pilot – including how decisions will be made to return service if the pilot is discontinued.
- Establish a baseline.** Early outreach can include user and community surveys to collect information and set a baseline around existing travel behavior and opinions on the program.

³ Steckler, B. et. al. (2020). [Perfecting Policy with Pilots: New Mobility and AV Urban Delivery Pilot Project Assessment](#). University of Oregon – Urbanism Next Center.

Set-Up

This step includes putting in place any of the policies, regulations, contracts, and plans needed to launch the pilot.

- **Update policies and regulations.** Many new mobility initiatives do not fit neatly within existing policies and regulations. LTD and its partners should review and update any policies and regulations that are inconsistent with the pilot. This process may require coordination with external decision-making groups.
- **Establish expected service levels and compliance mechanisms.** Contracts should stipulate the expected service levels and identify the compliance mechanisms and any financial or other penalties that will be imposed if service levels are not met.
- **Undertake procurement.** The project manager should work with Business Services to draft and issue a permit, RFI, or RFP, review responses, select, and finalize contracts with vendors for any new resources or services needed for the pilot.
- **Develop an installation and maintenance plan.** Some pilots will require purchasing and maintaining equipment. Depending on the type of equipment, the LTD project manager may need to coordinate the site planning and approval process and work with vendors and partners to develop an installation schedule. LTD should also work with vendors to develop a maintenance schedule to ensure public safety and that equipment is maintained in a state of good repair.

Contingency Planning

Pilot program planning should consider all possible outcomes including long-term implementation and discontinuation of the pilot.

- **Plan for the end of the pilot.** Pilots are usually time limited and at the end may become a permanent program, transferred to another agency, or discontinued. It is important that the planning stage considers all possible outcomes and plans for the end of the pilot. For example, it should identify whether the funding sources used for the pilot are ongoing or whether new funding would be needed for a permanent program; or identifying whether equipment can be repurposed, transitioned, or sold if ownership of the pilot is transferred or if the pilot is discontinued.

An Example of Navigating Inconsistent Mobility Regulations

Shared micromobility vehicles are often inconsistently defined and regulated, leaving these services in a legal grey area.

State law may impact how shared micromobility services can be regulated or operated or it may defer to local regulations.

There can also be inconsistencies between local jurisdictions. In areas where multiple jurisdictions are close together, it is important to recognize that shared micromobility vehicles will migrate across boundaries. To ensure a seamless user experience, neighboring cities should discuss and decide when regulations and regulatory structures need to be coordinated and when they can differ.

Source: NACTO Shared Micromobility Guidelines

- **Develop an equity assessment.** This assessment should consider which populations will benefit from the pilot (and any potential long-term program) and which populations could be detrimentally impacted or harmed by impacts to service and what mitigations would be needed to offset these impacts. The assessment should also identify programs that make the pilot more accessible to historically marginalized communities. For example, many mobility programs offer income-based discounts to ensure that the program is more accessible to vulnerable populations. LTD can also advance equity by building it into the policy framework (e.g., including goals and performance measures), centering vulnerable and historically marginalized communities in the decision-making process, reporting and evaluating equity outcomes, and continuing to analyze equity at the end of the pilot and into any long-term program.

Stage 2: Implementation

The second stage is to implement and run the program. It is important during this stage to engage with vendors and operators to address any concerns and to engage with the public and provide regular updates to stakeholders and decision-makers on the progress of the pilot. Some of the operational considerations during this stage are to monitor program performance and enforce compliance as necessary. Key steps during this stage include:

- **Continue to engage the community and pilot users.** Engagement during the implementation stage can be in the form of focus groups and/or surveys that take the temperature of user experience and public perception of the pilot. It is also important to create a mechanism for the public to register concerns about the program. These can inform staff about the key issues and allow them to work with the vendor(s) to troubleshoot or correct problems. Community input is an important source of information about how well pilots are performing and should be collected for ongoing monitoring and the evaluation stage of the pilot.
- **Work with vendors to monitor the program and address concerns.** Regular check-in meetings with vendors and operators can help identify and address issues as they arise and foster a strong working relationship that can benefit both public and private sector partners.
- **Monitor and enforce compliance.** Compliance with pre-determined service levels should be monitored and enforced through incentives and penalties. Examples of service levels could include requiring a microtransit service to provide certain on-time performance or a shared micromobility program to address parking issues within a certain time period. It is important that monitoring and compliance reflect the levels that would be present in the long-term implementation of the program so that operators, partners, and the public can see and evaluate what the future program would look like. The implementation stage should use the data and information shared and collected by vendors to monitor and incentivize/penalize vendors based on their success in reaching the goals of the program.

- **Manage program finances.** Part of regular reporting and check-in meetings should be monitoring the financial performance of the program. Financial management may require LTD staff to manage grant funding and compliance, ensure collection of permit and trip fees, and payment to vendors and contractors.
- **Coordinate with internal and external stakeholders.** An important role of the LTD project manager is to provide regular updates to internal decision-makers and external stakeholders. This could include updates to LTD's Board of Directors, the Strategic Planning Committee (SPC), and the Executive Team; as well as regular coordination and convening of an advisory committee or other groups to coordinate external stakeholders who have supporting roles in the program.



Stage 3: Evaluation

The evaluation stage is used to determine if the pilot program met the goals and objectives laid out in the planning stage and decide whether LTD should make the program permanent, adjust and continue the pilot, transfer the program to another agency or organization, or discontinue the program. This stage includes the following steps:

- **Collect program data.** The data needed for the evaluation will be defined in the planning stage and could include compiling vendor data, financial data, stakeholder feedback, and public input. This data needs to be collected, stored, and used within the terms included in any data privacy and usage agreements established during the planning stage.
- **Complete program evaluation.** This step includes calculating performance metrics and assessing them against the goals established in the planning stage. These should be summarized and reported out on a public facing website or final evaluation report.
- **Determine whether the pilot should move into expansion, modification, or termination.** The results of the evaluation should be presented to decision-makers to determine the long-term future of the program. This decision could include making the program permanent, adjusting and continuing the pilot, transferring the program to another agency or organization, or discontinuing the program.
- **Transition the program.** Depending on the outcome of the step above, there will be follow-up actions required to transition the program into a new format. This could include long-term planning and securing resources for a permanent program, updates to the planning assumptions for the continuation of a pilot program, actions to transfer assets and ownership to another agency or organization and define LTD's ongoing role, or actions to dispose of assets, terminate contracts, etc. if the program is discontinued. These actions require staff time and resources beyond the pilot period that should be accounted for in the planning stage.
- **Review and address equity impacts.** If the pilot program is to be discontinued, it is important that any impacts from changes in service are addressed and mitigated with at least a return to pre-pilot service levels.



Case Study 1: Oakland’s Universal Basic Mobility Pilot

Status: Stage 3 – Evaluation

OakDOT conducted a 12-month pilot of a Universal Basic Mobility program that distributed 500 prepaid debit cards to residents with \$300 pre-loaded for mobility expenses. The funds could be used for public transportation, bikeshare, and e-scooters.

Stage 1: Planning

- Program goal was to “increase transit, walking, biking, and shared mobility trips while reducing single occupancy vehicle trips near the Bus Rapid Transit corridor”.
- Timeline, budget, and pilot details such as financial incentives and marketing methods were developed.
- Pre-program survey conducted to understand baseline travel patterns, demographic data, and qualification.

Stage 2: Implementation

- Flyer distributed through mailing lists and community partners to promote program.
- Participants received the first \$150 travel credit upon signing up and the second \$150 credit upon completing a mid-program survey.
- Outreach coordination with partners including AC Transit, Oakland libraries, ZEV Action Plan.
- Marketing and education campaign including tabling, community bike rides, and other events.

Stage 3: Evaluation

- Mode shift data analysis (see Figure 3).
- Aggregated, anonymous prepaid card spending data evaluation (see Table 2).
- Identified future funding (proposed setting aside a portion of the parking system revenues and saved expenditures to fund a long-term program).

GOAL: Increase transit, walking, biking, and shared mobility trips while reducing SOV trips near the BRT corridor

BUDGET: \$243K, including \$215K grant from ACTC

TIMELINE: Grant received in 2017, ended December 31, 2021, evaluation in March 2022

METHODS:

- Financial incentives
- Personalized marketing of alternatives
- Evaluation for long-term program

“This program is not just about shifting travel behavior and patterns, but also reducing financial barriers to accessing opportunities and providing relief and rewards to existing and potential transit and shared-mobility users who help our cities and regions meet their clean air goals.”

-OakDOT Transportation Planner

Source: <https://www.smartcitiesdive.com/news/universal-basic-mobility-program-in-oakland-california-provided-lessons-i/621673/>

PEER AGENCY PROGRAMS

Figure 3: Oakland Universal Basic Mobility Survey Results

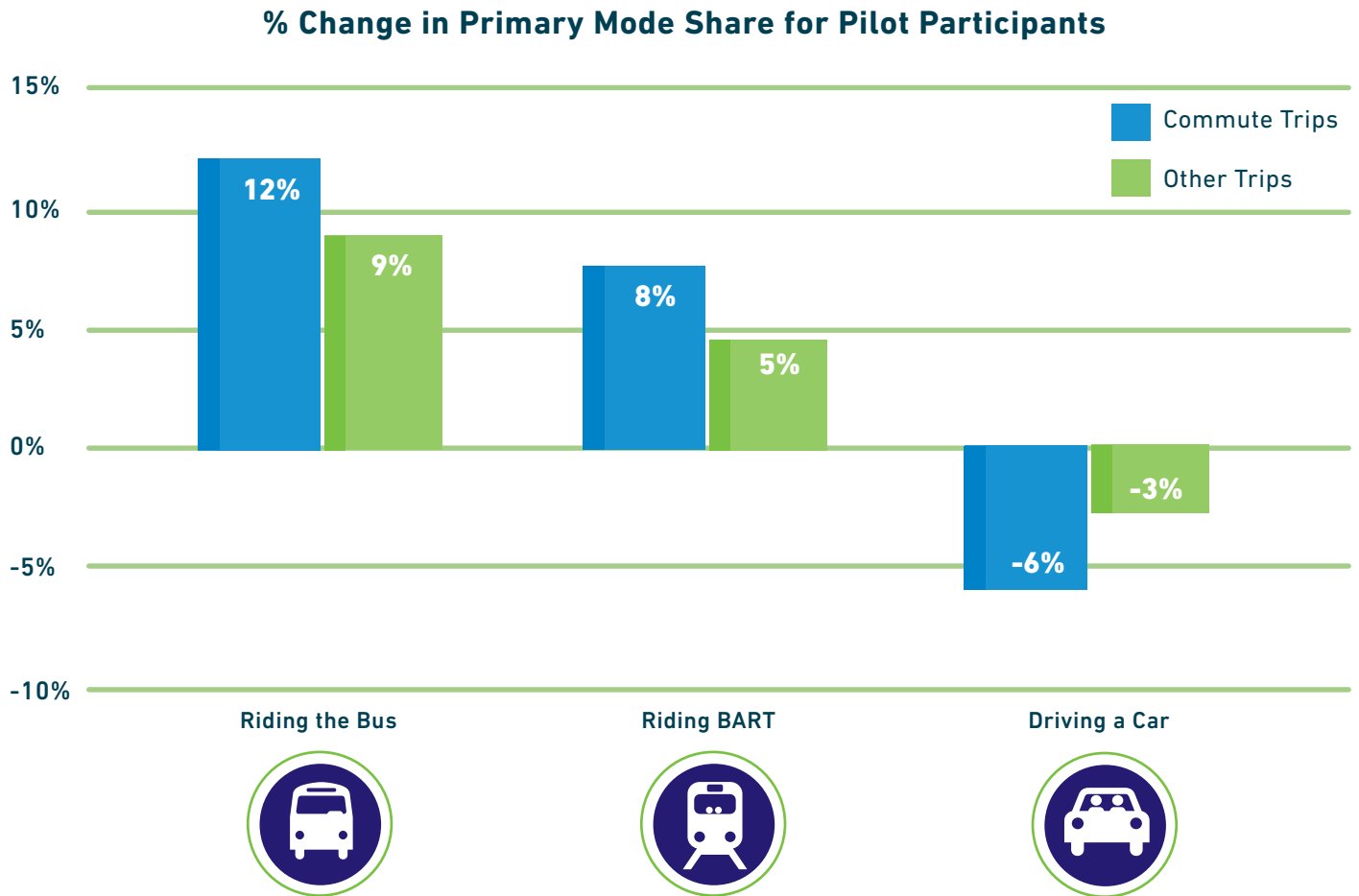


Table 1: Spending Breakdown by Service

Service	Amount	%
Clipper Card / BART	\$8,446	80.5%
AC Transit	\$986	9.4%
E-Scooter	\$702	6.7%
Bikeshare	\$207	2.0%
Other	\$150	1.4%
TOTAL	\$10,491	100%

Case Study 2: Santa Monica Shared Mobility Pilot Program

Status: Stage 2 – Implementation

The City of Santa Monica is overseeing a 21-month pilot program testing expanded shared mobility options. The pilot program allows four companies to operate various mobility devices including e-bikes, stand-up, and sit-down e-scooters in Santa Monica from July 2021 through September 2023.

This is Santa Monica’s second mobility pilot and required each company to apply for operating permits as part of the City’s updated Municipal Code and [Administrative Regulations](#).

Stage 1: Planning

- Started with learnings from the first pilot program, such as employing daily average fleet availability percentages across all City zones to prevent oversaturation of devices in sensitive and congested areas.
- Outlined program goals were to:
 - › Reduce emissions from short trips and enhance connections to transit.
 - › Ensure use of the public right-of-way benefits public mobility.
 - › Protect public health and safety.
- › Continue to increase user awareness of safe and legal behaviors for operating micromobility devices.
- › Prioritize reliability, affordability, safety, and sustainability.
- Additional program goals for the second version of the pilot program were to:
 - › Reduce sidewalk, pathway, and Americans with Disabilities Act (ADA) blockages.
 - › Create an enforceable framework for managing shared mobility services and ensuring operators are responsive to issues.
 - › Maintain flexibility and the opportunity to trial new devices and technologies as the industry continues to evolve.
- Determined program structure including pilot term, device types and system elements, scale of the program, fleet size caps, progressive penalty structure, and operating fees.
- Developed Administrative Regulations and an [application and selection process](#).
- Selection Committee comprised of City staff with at least one expert in shared mobility who was not a member of staff.



The first iteration of the City of Santa Monica’s Shared Mobility Pilot proved the popularity of the program, but identified several issues that needed to be addressed. Source: City of Santa Monica

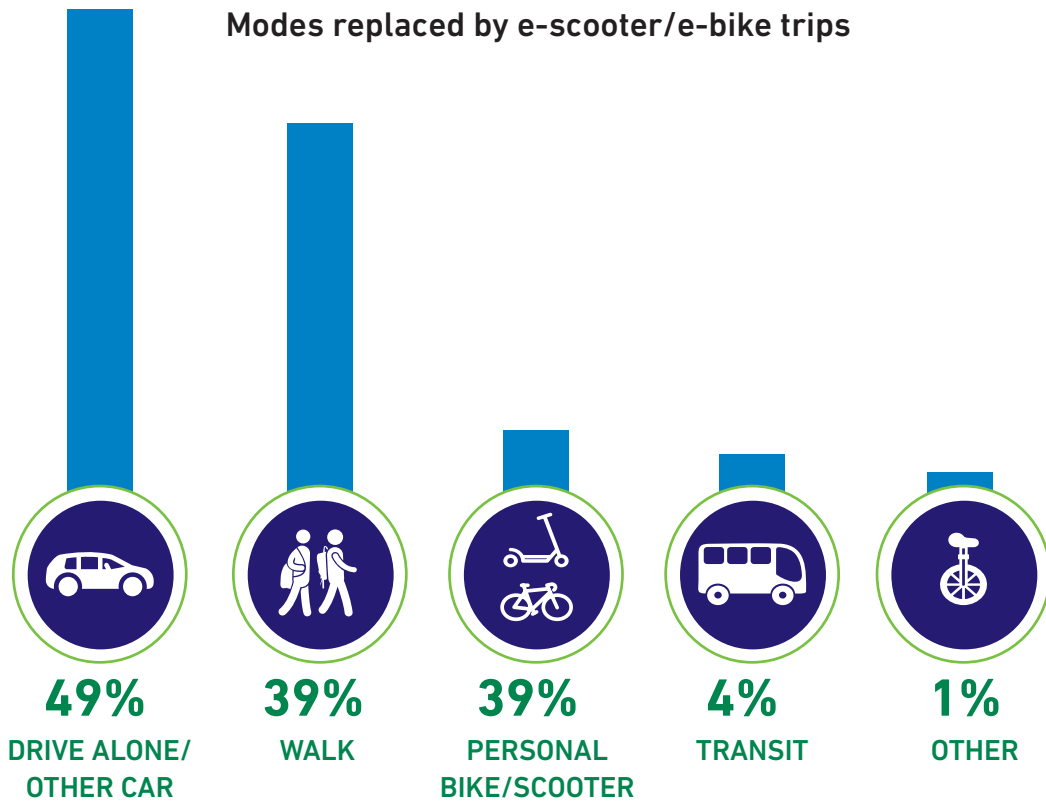
PEER AGENCY PROGRAMS

Stage 2: Implementation

- Performed interim program [evaluation](#) after 9 months of operations with recommendations such as working with operators to lower barriers to entry for low-income individuals.
- Worked with permitted service providers to ensure compliance with the program's Administrative Regulations.
- Worked with operators to address reported violations or to impound devices and issue citations.
- Developing the solicitation and negotiation process for the next phase of shared mobility to begin in 2023.



The City of Santa Monica installed parking zones and sidewalk medallions to encourage better parking behavior and reduce sidewalk riding conflicts. Source: City of Santa Monica



Almost half of trips made as part of the first mobility pilot replaced vehicle trips. Source: City of Santa Monica



Pilot Program Implementation Guide

May 2023

Mobility Management Strategy

LTD Board of Directors – June 21, 2023



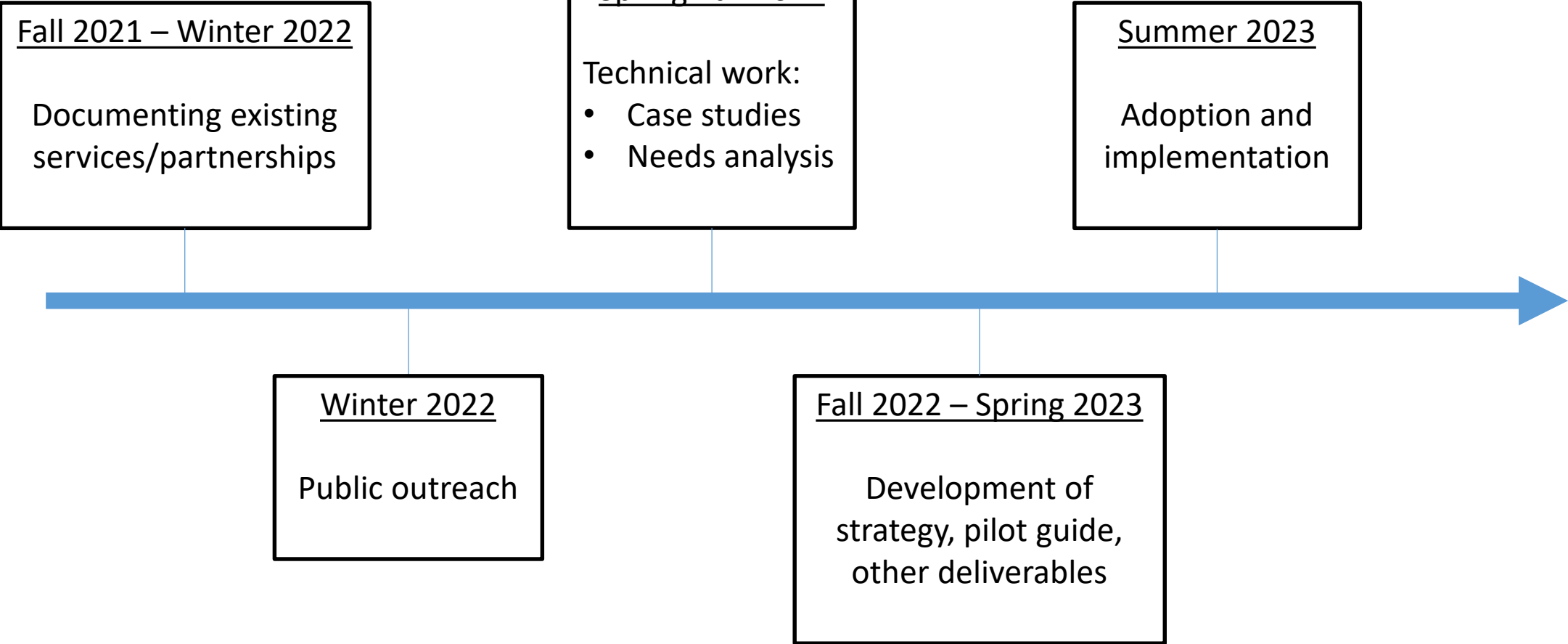
Mobility Management

“Mobility management is an approach to designing and delivering transportation services that starts and ends with the customer....”

It begins with a community vision in which the entire transportation network—public transit, private operators, cycling and walking, volunteer drivers, and others—works together with customers, planners, and stakeholders to deliver the transportation options that best meet the community's needs.”

- National Center for Mobility Management

Process



LTD is Already a Mobility Manager



Key Elements of Strategy

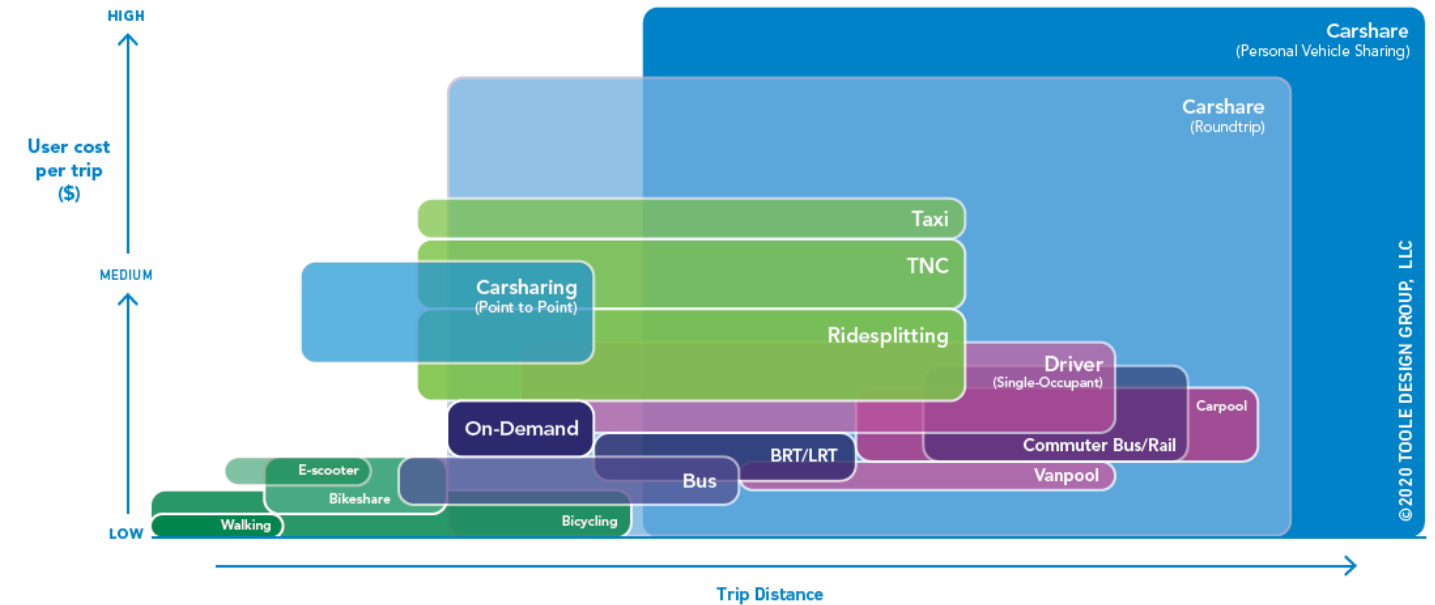
- Mobility management can help LTD fill gaps in service
- There is public interest in LTD filling service gaps
- LTD should play a key role in mobility in the region



Key Elements of Strategy

- Fixed route is the backbone of LTD's mobility management efforts
- There are many opportunities for LTD to explore that will improve mobility
- Piloting projects will help ensure success

Urban Transportation Spectrum



Match Modes to the Context

Transit Opportunity Areas

- < .5 miles to transit
- 41% of population
- 59% of jobs

First/Last Mile Opportunity Areas

- .5 – 3 miles from transit
- 29% of population
- 26% of jobs

Supplemental Service Opportunity Areas

- > 3 miles from transit
- 30% of population
- 15% of jobs



Implementation

- Decision making framework
- Pilot guide
- Technical memos
- Mobility Management Task Force



Next Steps

- Internalize decision making framework and mobility management into agency processes and structure
- Develop pilot projects with public and private sector partners
- Engage with local universities on shared research
- Identify new sources of funding for projects
- Embed mobility management in other plans and policies – “LTD 2.0”



SPC Feedback

- Lack of quorum prevented recommendation
- Committee members present were supportive of the Strategy
- Expressed interest in seeing tangible results of the Strategy soon

Questions?



AGENDA ITEM SUMMARY

DATE OF MEETING: June 21, 2023
ITEM TITLE: STRATEGIC BUSINESS PLAN REPORTING
PREPARED BY: Aimee Reichert, Senior Project Manager
CHIEF OFFICER: Joe McCormack, Chief Development Officer
ACTION REQUESTED: Information and Discussion

PURPOSE: To provide a progress update on the fiscal year 2022-2024 Strategic Business Plan (SBP) for fiscal year 2023 (FY23) Quarter 3 (Q3) (January 1, 2023 – March 31, 2023) progress and work ahead.

DESCRIPTION: The FY22-24 Strategic Business Plan guides the direction for Lane Transit District. The SBP includes five strategic areas of focus or success outcomes that the District strives to achieve in the next three years. Each element of the plan is purposefully aligned so that there is clarity around how work activities (tactics) and performance metrics impact these overall strategic outcomes.

BACKGROUND: The Board of Directors adopted LTD's Strategic Business Plan in July 2021. Implementation of the Plan began in October 2021 (FY22 Q2) and will span through June 2024. Since the last staff update to the committee, staff have continued implementing the tactics and monitoring the District's performance metrics as adopted in the SBP. Staff will provide a presentation on the Q3 FY23 results.

CONSIDERATIONS: Results were shared with the Strategic Planning Committee in May, 2023 for input. Staff are currently working on the Fiscal Year 2024 Strategic Plan Refresh, which allows for a review and re-design on tactical work to ensure LTD remains focused on the right work to achieve outcomes.

ALTERNATIVES: N/A

NEXT STEPS: Staff will provide Strategic Planning Committee and Board with Quarter 4, Fiscal Year 2023 Progress results along with Fiscal Year 2024 refreshed tactics in fall of 2023.

SUPPORTING DOCUMENTATION:

- 1) Strategic Business Plan Presentation

PROPOSED MOTION: N/A

LTD Strategic Business Plan Report

Quarter 3, Fiscal Year 2023





MISSION

Connecting Our Community

VISION

In all that we do, we are committed to creating a more connected, sustainable, and equitable community

VALUES

Respect, Integrity, Innovation, Equity, Safety, and Collaboration

Overview



LTD's Strategic Plan Overview



Scorecard Results

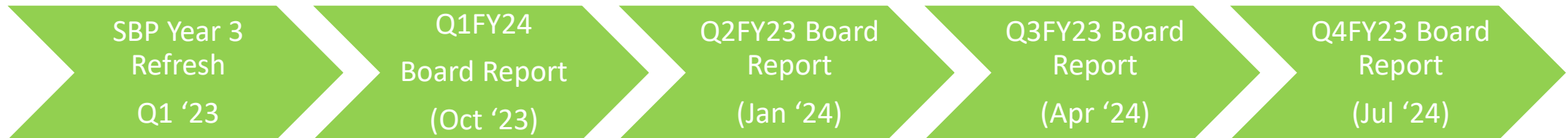
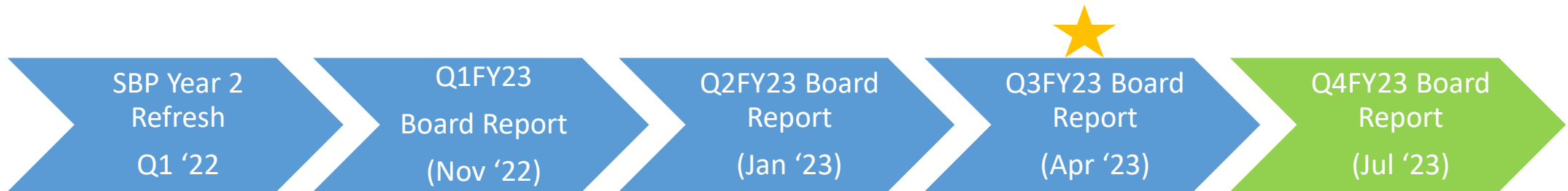
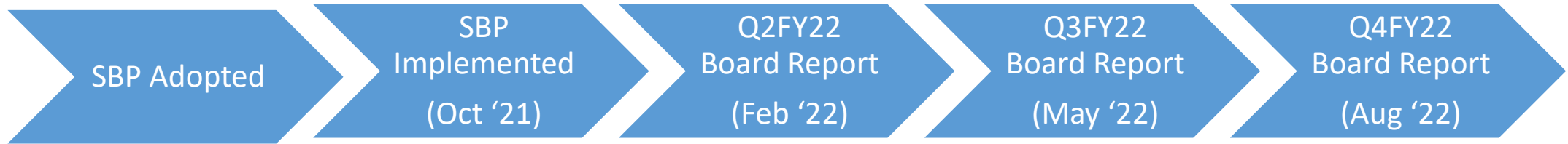


Tactical Highlights and Next Steps

Strategic Plan Overview

<https://www.ltd.org/strategic-business-plan/>

September 2021



June 30, 2024

Strategic Plan Overview – Key Terms



Customer Satisfaction

Work activities and performance goals that align LTD teams on delivering outstanding customer service.

Work Plan Tactics

8

Performance Metrics

8



Employee Engagement

Initiatives and performance goals centered on attracting and retaining a high quality workforce.

Work Plan Tactics

9

Performance Metrics

5



Community Value

Projects, programs, and performance goals aimed at providing strong value for the community.

Work Plan Tactics

7

Performance Metrics

4



Financial Health

Work plan tactics and performance goals focused on maintaining LTD's strong financial position.

Work Plan Tactics

5

Performance Metrics

3



Sustainability

Specific steps and performance goals to help LTD do its part to preserve and protect the environment.

Work Plan Tactics

2

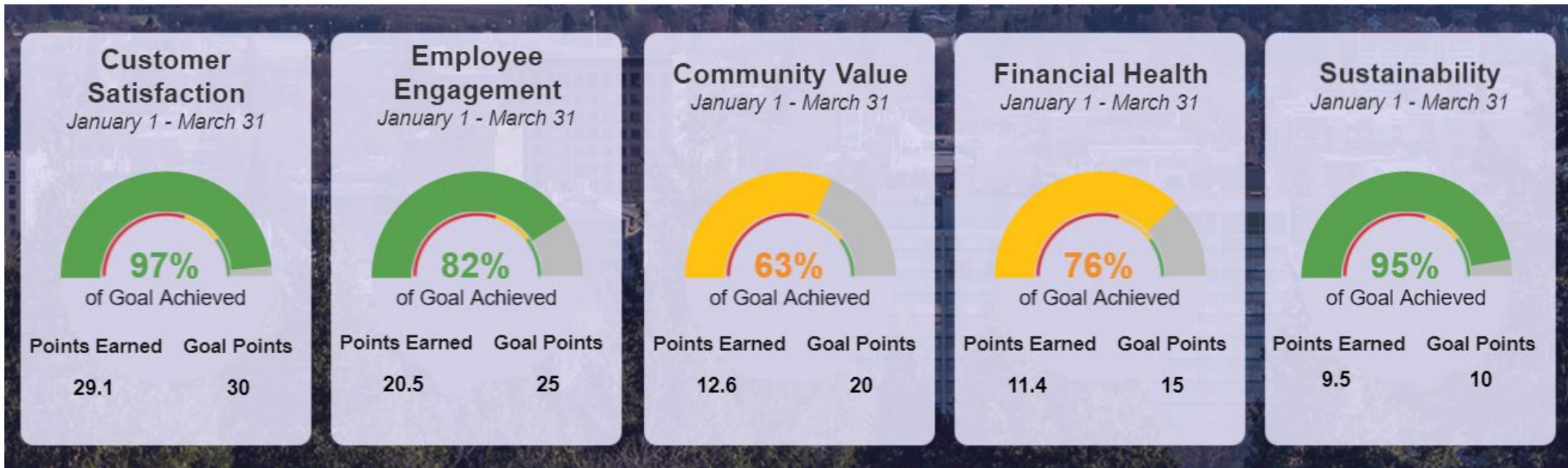
Performance Metrics

4

LTD Scorecard

Introducing LTD's Performance Dashboard - TransDash

<https://www.ltd.org/Performance/>





Customer Satisfaction

Metric	FY23 Q2	FY23 Q3	% Change
On-Time Performance	93.2%	93.3%	No Change
Accidents per 100,000 Miles	5.09	3.52	Decreased 31%
Bus Operator Complaints Per 100,000 Boardings	12.00	7.67	Decreased 36%

Overall, customer satisfaction indicators suggest improvement in progress, with emphasis on safety and responsiveness to customers. Current work focused on customer satisfaction indexing and leadership service sampling in order to drive improvement in this area.



Financial Health

Metric	FY23 Q2	FY23 Q3	% Change
Operating Cost per Boarding	\$9.11	\$9.98	Increased 9.5%
Maintenance Cost per Mile	\$1.46	\$1.44	Decreased 1%
Vehicle Hours per Labor Hour	.626	0.626	No Change

Overall, operating costs are up, which is expected due to standard Q3 VEBA contributions in January 2023. Increased costs also include Union wage adjustments. Current work focused on re-assessing long-term financial assumptions.



Sustainability

Metric	FY23 Q2	FY23 Q3	% Change
Fleet Transitioned to Electric	14%	14%	No Change
Renewable Fuel Consumption	95%	100%	Increased 5%
Ridership	1,485,465	1,539,651	Increased 4%

Overall, Sustainability indicators suggest LTD remains committed to renewable fuel consumption but will need to think innovatively about long-term dynamics in ridership and fleet. Current work focused on bi-annual Green House Gas Emission assessment.

Tactical Work Highlights



Employee Engagement

- Instructor training week completed
- Operations Command Center Design
- Performance Management Reboot

Community Value

- Leadership Service Sampling
- Eugene Station Modernization Design



What's Next?



- 2023 Employee Engagement Survey
- Comprehensive Operations Analysis Kick-Off
- Fiscal Year 2024 Strategic Plan Refresh



Questions?

