Overview

• Transit Development Planning Guidebook
  – What is a TDP and why should you prepare one?
  – What’s in the Guidebook?
    • How will it help me?
    • What are the critical steps?

• Basic budgeting for route planning
Background

• Why did ODOT decide to do this project?
• Timeline
  – Draft by the end of the year
  – Available to public and practitioners early next year
What is a TDP?

• Transit Development Plan
  – Sometimes called Transit Master Plans
What Does a TDP Do?

- Express goals
- Identify needs and strategies
- Inform and integrate transit needs into other planning processes.
Why prepare or update a TDP?

TDPs help transit providers identify their needs and make informed decisions to address them.

TDPs promote transparent and accountable decision-making.
Why prepare or update a TDP?

- Define transit's role in the community
- Comply with the Transportation Planning Rule (OAR 660, Division 12) and other legal requirements
- Strategically plan for service and capital investments
- Strengthen coordination with partners and other planning processes
- Evaluate the impacts of growth and land use changes on the transit system
- Explore alternative futures
- Increase the ability to obtain funding and public support for transit
Transportation Planning Rule

"[Mass transit] districts shall prepare and adopt plans for transportation facilities and services they provide. Such plans shall be consistent with and adequate to carry out relevant portions of applicable regional and local TSPs. Cooperative agreements executed under ORS 197.185(2) shall include the requirement that mass transit ... districts adopt a plan consistent with the requirements of this section."
Who is the Guidebook Audience?

- You
  - Transit provider staff
  - ODOT staff
  - Local government staff and decision-makers
  - Regional agency staff and decision-makers
  - Members of the community
What SHOULD a TDP DO?

- Identify and prioritize public transit investments
- Assess the potential for transit to support community goals
- Identify transit needs
- Explore alternatives for addressing transit needs
- Help improve connectivity between transit stops, other transportation modes, and riders' origins and destinations
- Be linked to performance measures and targets
- Include a financially constrained plan
- Provide the basis for the transit element of the community’s TSP
**TRANSPORTATION SYSTEM PLAN (TSP)**

- Transportation Vision & Goals
- Future Population and Job Densities
- Travel Demand
- Disadvantaged Populations
- Inventory of Transit-Supportive Infrastructure
- Planned/Prioritized Transit-Supportive Infrastructure
- Cost-Constrained Improvements
- Implementation Plan

**TRANSIT DEVELOPMENT PLAN**

- Transit Vision and Goals
- Future Ridership Potential
- Transit Access Needs
- Future Transit Routes, Capital, and Infrastructure Needs
- Future Transit Scenarios
- Funding Needs and Priorities
- Implementation Plan
What else COULD a TDP Include?

- Detailed visioning and goal-setting
- Performance measurement program
- Transit design standards
- Operations assessment
- Title VI (environmental justice) analysis
- Transit Asset Management Plan
- Amendments to local land development codes and comprehensive plans
- Park-and-ride program or transportation demand management (TDM) program
- Review of governance and/or administrative structure
Relationship to Other Plans

- A TDP influences and is influenced by other plans.
- Data sets and analyses should be shared.
- Sharing promotes consistency, reduces duplication of effort, and may reduce costs.
What are the typical components?

• Background information
• Assessment of other plans and programs in the region
• Vision and goals
• Public involvement plan
• Partner agency involvement plan
• Existing conditions assessment
• Identification of needed services and infrastructure
• Future funding scenarios
• Ridership forecasts
• Financial plan
• Implementation plan
# Guidance Organization

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- Appendices:
  - Definitions
  - Transit Planning Concepts Primer
  - Model TDP Outline
  - Examples
2. Getting Started on a TDP

• Managing Expectations
  – A TDP should be visionary but pragmatic.
  – Answer the question, "What if?" as to what it might do if more resources become available.
  – What “Shoulds” and “Coulds” will you address?
  – Consider transit types and supportive densities

• Scoping
  – Define Purpose
  – Coordination with Other Processes
  – Resource Considerations
3. TDP Context

- Purpose
- Provider History
- Provider Funding and Governance
- Agency Partners
- Related Plans and Programs
  - Plan and Program Review Questions
4. Stakeholder Involvement

- Why?
- Involvement Frameworks
- Strategies
- Best Practices
- Resources
5. Vision and Goals

• Why?
• Performance Measuring
• Trade-offs (e.g.)
  – Frequency and service coverage
  – Focus on regional or local service
  – Conditions optimal for riders vs providers
• Resources
6. Baseline Conditions

• Why?
• Analyses
  – Demographics
  – Land Use and Development
  – Fleet
  – Infrastructure
  – Other Providers
  – Transit Performance
    • Trend Analysis
    • Peer Analysis
    • Other Analyses
  – Resources
6. Baseline Conditions

- Trend Analysis
  - Why are the trends occurring?
  - What conclusions can be drawn from the graphs?

- Peer Analysis
  - What can we learn from our peers?
7. Needs Assessment

• Why?

• Analysis Components
  – Performance Measures
  – Baseline Growth
    • Multiple estimation and modeling options provided
  – Stakeholder Input

• Summarize Results

• Resources
8. Alternatives Development and Evaluation

• Why?
• Analysis Approach
  1. Identify potential improvements
  2. Develop alternatives (if applicable)
  3. Evaluate improvements
  4. Refine
  5. Forecast demand and revenue
• Summarize Results
• Considerations
• Resources
8. Alternatives Development – Themes

- **Financial possibilities:** Status quo, various levels of increased funding, decrease in funding due to a recession impacting tax revenues, etc.

- **Service balance possibilities:** Different allocations of operating budget between providing service coverage and maximizing ridership.

- **Structural possibilities:** Frequency vs. service span improvements, expansion into new areas vs. providing more service in the existing service area, infrastructure and technology investments to improve transit speed and reliability, etc.

- **Land use possibilities:** Status quo, different levels of growth, densification along transit corridors, etc.
9. Financial Assessment

• Why?
• Funding Scenarios
• Costing Improvements
• Approaches to Funding Alternatives
• Resources

Example Funding Forecast Assuming Status Quo

- Miscellaneous Charges for Services
- Intergovernmental Revenues
- Potential Additional Tax Revenue from New Growth
- Future Property Tax Revenue from Existing Assessed Property
In-Process Chapters

10. Implementation

11. Documentation

12. Other Components
   – Appendix A: Definitions
   – Appendix B: Transit Planning Concepts Primer
   – Appendix C: Model TDP Outline
   – Appendix D: Examples
Cost Estimating Additional Service – Existing Transit Systems

1. Assemble Data
   - System-wide budget breakdown
     • Operating (driver salary, phone services, contractual services)
     • Administrative (employee salary, marketing, office equipment)
     • Maintenance (bus maintenance, bus insurance, vehicle upgrades)
   - Revenue service hours by route
   - Revenue service miles by route
Cost Estimating Additional Service – Existing Transit Systems

2. Develop Cost Factors
   – Operating Factor
     \[
     \text{System Operating Costs} = \frac{\text{System Revenue Service Hours}}{}
     \]
   – Maintenance Factor
     \[
     \text{System Maintenance Costs} = \frac{\text{System Revenue Service Miles}}{}
     \]
   – Administrative Factor
     \[
     \text{System Administrative Costs} = \frac{\text{System Operating Costs} + \text{System Maintenance Costs}}{}
     \]
Cost Estimating Additional Service – Existing Transit Systems

3. Allocate Costs by Route
<table>
<thead>
<tr>
<th>Route</th>
<th>Hourly Based Costs ($)</th>
<th>Mileage Based Costs ($)</th>
<th>Admin Costs ($)</th>
<th>Total Costs ($)</th>
<th>Service Hours</th>
<th>Total Cost/ Hour</th>
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<tbody>
<tr>
<td>Newport DAR</td>
<td>62,561</td>
<td>17,063</td>
<td>28,537</td>
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<td><strong>Total DAR</strong></td>
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<td><strong>Total Intercity Routes</strong></td>
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<td><strong>250,350</strong></td>
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<td><strong>Total City Loops</strong></td>
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<td><strong>Total</strong></td>
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Cost Estimating Additional Service – Existing Transit Systems

4. Apply costs by service/route type to new or additional service
   – Intercity Route - $59.64/hour
   – Regional Route - $70.12/hour
   – City Loop - $54.35/hour
Cost Estimating Service– New Systems

• Operating Costs\(^1\): Comparable Systems
  – Gather cost, revenue hours, and ridership data
    • Geographically – similar regions preferred (urban, rural)
    • Service – Similar mix of dial-a-ride, fixed-route, regional routes
    • Source: Urban & Rural National Transit Database

• Capital Costs: National & State Sources
  – Vehicle costs, state and federal match, local funding
    • Source: APTA’s Public Transportation Vehicle Database
    • Source: 2015-2018 STIP Funding

\(^1\) Includes maintenance and administrative costs.
Cost Estimating Service

• Existing Transit Systems
  – Forecast service cost changes with change in hours and/or mileage to existing routes
  – Forecast costs for new routes by service type (dial-a-ride, city routes, county routes)

• New Systems
  – Forecast operating cost (annual reoccurring) and capital costs (up front cost) when planning for new systems
  – Capital can be dependent on grants and the critical element for new system feasibility
Questions?