

**LINN BENTON LOOP SERVICE DEVELOPMENT PLAN  
KICK-OFF MEETING AGENDA**September 7, 2018  
8:30 a.m. – 10:00 a.m.Oregon Cascades West Council of Governments  
1400 Queen Ave SE, Albany, OR  
Downstairs Conference Room  
Conference Line: 541-497-7311, Pin #841

Time	Topic	Lead
8:30 – 8:35 a.m. (5 min.)	<b>Welcome &amp; Introductions</b>	Phil Warnock, OCWCOG
8:35 – 9:55 a.m. (20 min.)	<b>Project Overview</b> <ul style="list-style-type: none"> <li>▪ What does success look like for this plan?</li> <li>▪ Scope overview (Attachment A)</li> <li>▪ Schedule</li> </ul>	Jamey Dempster, Nelson\Nygaard
8:55 – 9:10 a.m. (15 min.)	<b>Planning Context</b> <ul style="list-style-type: none"> <li>▪ Albany TDP, Corvallis TDP, Lebanon TDP, Benton Co TSP, Linn Co TSP, Coordinated Plan Regional Chapter</li> <li>▪ Key issues and improvements</li> </ul>	
9:10 – 9:20 a.m. (10 min.)	<b>Existing Conditions &amp; Market Analysis</b> <ul style="list-style-type: none"> <li>▪ What we know from past plans</li> <li>▪ What do we need to know?</li> </ul>	
9:20 – 9:55 a.m. (35 min.)	<b>Needs and Opportunities</b> <ul style="list-style-type: none"> <li>▪ Discussion: What are our top priorities, needs and opportunities?</li> </ul>	
9:55 – 10:00 a.m. (5 min.)	<b>Next steps and action items</b> <ul style="list-style-type: none"> <li>▪ Data needs</li> <li>▪ Survey</li> <li>▪ Tech Memo #1: Existing Conditions and Needs Assessment</li> <li>▪ Next TAC meetings: Tuesday, October 2nd, 2:30 – 4:30 pm, same location</li> </ul>	

## MEMORANDUM

To: Terry Cole, Oregon Department of Transportation;  
Phil Warnock, Cascades West Council of Governments and Loop TAC;  
Lee Lazaro, Benton County Transportation and Loop TAC

From: Nelson\Nygaard

Date: May 22, 2018

Subject: Linn-Benton Loop Service Development Plan

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**Schedule:** June 1, 2018 – January 31, 2019

**Budget:** NTE \$60,000

**Project Purpose:** To develop detailed near-term service improvements with associated schedule changes, route changes, bus stop locations and other projects and activities. The transit improvements or projects will be described by cost estimates, phases, Linn-Benton Loop partner roles, and estimated service benefits. The project must meet the priority needs of the Linn-Benton Loop members. Projects should be created with ODOT's State Transportation Improvement Fund (STIF) and other funding programs in mind, addressing STIF and Local Plan needs.

**Client:** Oregon Cascades West Council of Governments, via Oregon DOT Region 2

**Prime:** DKS Associates

**Advisory Committee:** Linn-Benton Loop Technical Advisory Committee

**Management Team:** Loop Governing Board Chair, CWCOG staff member, consultant team

## SCOPE OF WORK

This project scope of work describes how DKS Associates and Nelson\Nygaard Consulting Associates (Consultant) will deliver the Linn-Benton Loop Service Development Plan (Plan). The outcome of the project will be detailed near-term service improvements for the Linn-Benton Loop (Loop), summarized by associated scope, deliverables, costs, and benefits. The Plan strategies should meet the priority needs of the Linn-Benton Loop Governing Board and be created with Oregon Department of Transportation transit funding programs in mind, addressing STIF and Local Plan needs.

All deliverables described in the tasks below include a draft and final version. The final version will include changes reflecting edits and suggestions from one consolidated set of comments from the Agency Project Manager or designated project lead.

A successful project relies upon the buy-in from community stakeholders and decision makers. Local communities in Linn and Benton Counties have recently completed Transportation System Plans and Transit Development Plans that provide overarching policy direction for this Plan.

Consultant and the Agency Project Manager will build from input gathered from those plans, and focus interaction with two groups guiding the Linn-Benton Loop.

- *Linn-Benton Loop Governing Board (Board)* – The Board consists of six Board members, reflecting the six primary funding partners for the Loop. The Board established a Technical Advisory Committee to advise the Board and staff regarding transit operations and performance. The Board meets quarterly. The Board will provide final decision making for the Loop but will not engage the project directly. The Consultant will present the draft final Plan to the Board in the last project phase.
- *Technical Advisory Committee (TAC)* – The TAC is an advisory committee to the Board. The TAC will review Plan deliverables and technical work, and will represent regional stakeholders who affect or are affected by the Loop services. This group will meet with Consultant five times by phone and two times in person meetings. The TAC will have project-level decision responsibility. The TAC may bring additional advisory members to the project meetings as needed, to be facilitated by the Linn-Benton Loop staff.
- *Project Management Team (PMT)* – The Linn-Benton Loop Governing Board will provide at least one staff liaison to support day-to-day contact with the project team. The Loop project manager will meet with the project team on a bi-weekly basis to provide ongoing day-to-day support and oversee the project.

**Definitions:**

*Plan – Linn-Benton Loop Service Development Plan*

*Agency Project Manager – Oregon Department of Transportation staff representative*

*Loop Project Manager – Linn-Benton Loop staff representative*

*Project Team – Linn-Benton Loop staff and consultant team*

*Consultant – Nelson Nygaard Consulting Associates and DKS Associates*

*TAC – Technical Advisory Committee*

*Board – Linn-Benton Loop Governing Board*

## **TASK 1 PROJECT MANAGEMENT AND OVERSIGHT**

### **1.1 – Kickoff meeting**

Nelson Nygaard will facilitate a project kickoff meeting with the TAC. The purpose of this meeting is to:

- Establish administrative and communication procedures
- Discuss initial project goals and objectives
- Discuss work plan scope and schedule
- Obtain data and information for technical analysis
- Review regional planning outcomes to date

Nelson Nygaard will present a project overview to the Governing Board on the same day as the TAC kickoff meeting. The presentation address project goals and objectives, plan scope and schedule, and collect feedback on stakeholder priorities, needs, and resources. Alternatively, the Governing Board members may be invited to the TAC meeting time.

## **1.2 – Monthly TAC meetings**

Consultant will facilitate monthly meetings with the TAC. The purpose of the meetings will be to provide a project update, coordinate key tasks, seek clarification and direction approach, and discuss comments and revisions to deliverables. The Consultant will meet with the TAC six times; including Task 1.1 Kickoff meeting and Task 3.4 Strategies Workshop. Consultant will plan to attend and facilitate TAC meetings in the Albany area; should meetings occur by phone, consultant will provide web-based conference call system allowing for real-time presentation and screen sharing.

## **1.3 – Bi-weekly PMT meetings**

Consultant will facilitate bi-weekly Project Team phone meetings of up to 1-hour in duration throughout the project period. The purpose of the calls will be to review current project work, discuss key questions or issues, review upcoming tasks, and share comments on recent deliverables or other work products.

## **1.4 – Linn-Benton Loop Governing Board presentation**

Consultant will present the final draft Plan to the Linn-Benton Loop Governing Board to present information and strategies, answer questions, and facilitate a discussion with Governing Board members about the Plan and the future of the Loop.

### **Deliverables**

- Kickoff Meeting/ TAC #1 agenda; Kickoff meeting facilitation; Kickoff meeting notes including a summary of action items
- Data and information request
- Monthly TAC meetings
- Bi-weekly call agenda and meeting notes
- Presentation to the Linn-Benton Loop Governing Board

## **TASK 2 EXISTING CONDITIONS AND NEEDS ASSESSMENT**

The purpose of this task is to develop a shared understanding of interregional transportation needs for people whose location and travel needs the Loop can reasonably address in its current form. Consultant will use information and data from completed or concurrent projects, recent service performance data, and feedback from an on-board survey, as available. The resulting Technical Memorandum will summarize key needs and opportunities in relatively brief form and focused on key issues affecting service planning priorities and decision points, as the TAC is highly fluent in service area, ridership markets, and analysis completed in recent plans.

### **Task 2.1 - Transportation Market Analysis**

- Collect and analyze relevant origin and destination studies, surveys and analysis from past plans, or as available from the CALM model or other analysis tools.
- Analyze Corvallis Transit System, Albany Transit System and Linn-Benton Loop trip origins and destinations, including any rider survey data available.

- Define low income by identifying data and thresholds acceptable to all TAC members, to support Oregon State Transit Improvement Fund metrics and applications.
- With STIF program start-up in 2019, Linn Shuttle, ATS TDP, and CTS TDP service enhancements may also be taking place. The market analysis should move the Loop service forward in coordination with at least known planned improvements in those services.
- Create one map illustrating key activity centers and markets relevant to the Loop service type. Consultant will use data available from existing plans (e.g. Corvallis Transit Development Plan, Albany Transit Development Plan, Benton County Transportation System Plan). Map may be illustrative to summarize service area demands and to reflect the geographic / distance issues related to regional service coverage.

### **Task 2.2 – Transportation Services Analysis**

- Assess existing transportation services based on information and analysis from regional Transportation System Plans and Transit Development Plans completed in 2017 or expecting completion in 2018. Measures include but are not limited to service hours, frequency, revenue hours, revenue miles, ridership, operating cost, vehicle type, bus stop amenities, and fare policies.
- Inventory on-demand transportation services such as transportation network companies, taxis, carsharing, carpooling, bikesharing, park-and-rides, and incentive programs, inasmuch as these services may relate to public transportation use and service design.
- Identify and assess transportation needs relevant to the Linn-Benton Loop, given the existing resources, transportation services, and existing and potential rider market needs.
- Consultant will discuss Task 2.1 and 2.2 findings with TAC during a phone meeting

### **Task 2.3 – Loop On-Board Survey Support**

- Support the Loop and partners to develop and deliver an on-board survey that will yield rider information to support service market analysis and service planning. Survey support will at least include a review and comment on survey instrument, and review and comment on survey delivery plan and logistics.
- The on-board survey must be completed by June 1 while regional academic institutions are in session, to yield ridership data that can support Loop strategy development within the Plan schedule. Survey analysis must be completed and submitted to Consultant by July 15, 2018 to be included in Consultant Task 2 deliverables. Survey data collected or completed after that date will be incorporated into strategy development process, though not necessarily documented in Consultant deliverables.

### **Task A (optional) – Loop On-Board Survey Delivery**

- If required and authorized by the Project Manager, Consultant will develop and deliver an on-board survey that will yield rider information to support service market analysis and service planning.
- Survey development and delivery will include staff and local project management to create survey instrument, deliver surveys on Loop vehicles

## Deliverables

- Technical Memorandum #1: Existing Conditions and Needs Assessment; preliminary strategy development approach
- TAC Meeting #2: Existing conditions
- Loop rider survey instruments and analysis report (optional)

## TASK 3 TRANSIT SERVICE SCENARIOS

The purpose of this task is to understand which transit service outcomes are most important to achieve, understand and prioritize service markets, and develop potential short-term service improvements.

### Task 3.1 – Develop Evaluation Framework

- The Consultant will build on the existing conditions analysis and past plans to develop an evaluation framework. The evaluation framework will describe performance measures and process stemming from mobility goals and overall service vision guiding the Loop Governing Board and partners today. A brief memorandum and TAC Meeting #2 will help Consultant develop an evaluation process that will inform TAC member decision-making.
- The performance measures will be designed through the evaluation framework to ensure evaluation answers questions relevant to the Loop transportation goals, stakeholder interests, and plans. The Consultant will develop and measure five performance metrics, to provide a concise comparison. Suggested measures include:
  - Estimated quantitative descriptions such as route frequency, hours of service, and end-to-end travel time.
  - Quantitative measures such as jobs and residents within one-quarter mile of stops, cost, and ridership effects available from sketch planning tools.
  - Qualitative measures such as schedule clarity and traveler comfort.

### Task 3.2 – Funding Assessment

Consultant will summarize planned funding sources between fiscal years 2019 and 2023 (i.e. two ODOT funding biennia), partnerships and service methods to support the Plan. The funding information will include sources accessible for Loop services, and sources used by partner transit agencies for related regional services. The funding information will provide information for TAC to assess opportunities and constraints, prioritize strategies and prepare funding applications. A brief memorandum and discussion at TAC Meeting #2 will help Consultant develop accurately reflect expected resources.

### Task 3.3 – Strategy Development and Evaluation

Consultant will develop up to three near-term (4-year) operating scenarios, each including linked or related near term service improvements to Loop service addressing needs and opportunities identified in Task 2. The operating scenarios will be described and evaluated to help TAC understand the tradeoffs, or costs and benefits, of each service approach. Each scenarios will include a route and schedules, capital needs (e.g. vehicles, bus stops, equipment), operating needs, and programmatic projects (e.g. marketing, outreach). Service improvements will be

considered in how they coordinate Loop efforts with existing partners' efforts to evolve services for the individual systems.

### **Task 3.4 – Strategies Workshop (TAC Meeting #4)**

Consultant will facilitate an in-person workshop / TAC meeting to evaluate and prioritize markets and strategies service improvements addressed through the operating scenarios (Task 3.3). “Strategy” is understood to include detailed service improvements to bus routes, schedules, bus stop locations, and other projects and activities serving the Linn-Benton Loop service goals and priorities. The meeting will include a summary of evaluation results by scenario, including benefits to travel markets identified in Task 2. The goal of the meeting is to prioritize service areas and travel markets over the next four years, and identify the service scenario or approach best addressing those priorities. The outcome of the meeting will be one preferred operating scenario including up to six operating, capital, and programmatic strategies (aka “projects”) to carry forward to the Service Plan (Task 4).

#### **Deliverables**

- Technical Memorandum 2: Evaluation framework
- Technical Memorandum 3: Funding scan
- TAC Meeting #3: Evaluation framework, funding scan
- Workshop agenda, evaluation summary materials, and meeting outcomes summary.
- TAC Meeting #4: Strategies workshop

## **TASK 4 SERVICE PLAN**

The purpose of this Task is to describe strategies selected for the Loop Governing Board and partners to implement over the next four years, detailing route and schedule, vehicle and equipment needs, financial plan, and action steps and partner roles.

### **Task 4.1 Linn-Benton Loop Service Development Plan**

The Plan will include data and information developed through Tasks 1 through 3, documenting the process and illustrating the travel needs and opportunities leading to the proposed service improvements. The Plan will include:

- Clear, accessible language to reach a broad audience familiar with transportation but not necessarily public transportation operations and funding.
- Financial plan in two-year increments to support funding applications and plans required for ODOT programs.
- Actions for specific institutional partners to ensure implementation is clearly communicated.
- Expected implementation benefits (e.g. ridership, access to low income communities)

The Consultant will meet with the TAC two times through this process: once to review strategies developed after TAC Meeting #4, and once to review the final draft Plan.

### **Task 4.2 – Loop Governing Board Presentation**

Consultant will attend one Linn-Benton Loop Governing Board meeting to present the Draft Final Plan. The Consultant will develop the presentation materials, respond to questions and

comments. Consultant expects that the Loop Project Manager will provide meeting recording and summary as part of regularly scheduled meeting facilitation.

**Deliverables**

- TAC Meeting #5 Draft Service Enhancement Strategies
- TAC Meeting #6 Draft Service Enhancement Plan
- Governing Board Presentation
- Draft / Final Draft Plan (considered Final after one round of edits following Governing Board presentation)



Figure 1. Budget

Task Description	Nelson\Nygaard Labor Costs				Subconsultant Costs		Total Labor Hours	Total Labor Costs	Total Direct Expenses	Total Costs			
	Stephanie Wright	Jamey Dempster	Paul Leitman	Corinna Kimball-Brown	NN Labor	DKS Associates Reah Flisakowski Principal Engineer							
	Principal 1	Senior Associate 1	Associate 3	Associate 2									
Base Rate	60.78	46.86	31.76	29.61									
Overhead 178.31%	108.38	83.56	56.63	52.80									
Profit 10%	16.92	13.04	8.84	8.24									
<b>Total Billing Rate</b>	<b>\$186.07</b>	<b>\$143.46</b>	<b>\$97.23</b>	<b>\$98.65</b>	<b>Hours</b>	<b>Cost</b>	<b>\$165.18</b>	<b>Total Subconsultants Labor Hours</b>	<b>Total Subconsultants Labor Costs</b>	<b>Total Labor Hours</b>	<b>Total Labor Costs</b>	<b>Total Direct Expenses</b>	<b>Total Costs</b>
<b>1 Project Management and Outreach</b>													
1.1 Kickoff TAC and Board meeting #1		7	10	9		26	\$3,612	4	\$661	30	\$4,273		\$4,273
1.2 Monthly TAC meetings in person (4)		10	16	16		42	\$5,712	1	\$165	43	\$5,877		\$5,877
1.3 Bi-weekly project management meetings (10)		5	8	8		21	\$2,856	0	\$0	21	\$2,856		\$2,856
<b>Task Total</b>		<b>22</b>	<b>34</b>	<b>33</b>	<b>0</b>	<b>89</b>	<b>\$12,180</b>	<b>5</b>	<b>\$826</b>	<b>94</b>	<b>\$13,006</b>	<b>\$100</b>	<b>\$13,106</b>
<b>2 Existing Conditions and Needs Assessment</b>													
2.1 Transportation Market Analysis		2	8	24	8	42	\$4,579	8	\$1,321	50	\$5,900		\$5,900
2.2 Transportation Service Analysis		4	8	24		36	\$4,225	0	\$0	36	\$4,225		\$4,225
2.3 Loop On-Board Survey Support		2	4	16		22	\$2,502	0	\$0	22	\$2,502		\$2,502
<b>Task Total</b>		<b>8</b>	<b>20</b>	<b>64</b>	<b>8</b>	<b>100</b>	<b>\$11,306</b>	<b>8</b>	<b>\$1,321</b>	<b>108</b>	<b>\$12,627</b>	<b>\$0</b>	<b>\$12,627</b>
<b>3 Strategy Development</b>													
3.1 Evaluation Framework		1	4	16		21	\$2,316	0	\$0	21	\$2,316		\$2,316
3.2 Funding Assessment		1	10	16		27	\$3,176	0	\$0	27	\$3,176		\$3,176
3.3 Strategy Development and Evaluation		4	16	40		60	\$6,929	6	\$991	66	\$7,920		\$7,920
3.4 Strategies Workshop / TAC #3		2	8	16		26	\$3,075	0	\$0	26	\$3,075		\$3,075
<b>Task Total</b>		<b>8</b>	<b>38</b>	<b>88</b>	<b>0</b>	<b>134</b>	<b>\$15,496</b>	<b>6</b>	<b>\$991</b>	<b>140</b>	<b>\$16,487</b>	<b>\$100</b>	<b>\$16,587</b>
<b>4 Loop Service Development Plan</b>													
4.1 Draft / Final Draft Linn-Benton Loop Service Development Plan		10	24	30	6	70	\$8,765	2	\$330	72	\$9,095		\$9,095
4.2 Linn-Benton Loop Commission presentation			6	2	2	10	\$1,237	0	\$0	10	\$1,237		\$1,237
<b>Task Total</b>		<b>10</b>	<b>30</b>	<b>32</b>	<b>8</b>	<b>80</b>	<b>\$10,001</b>	<b>2</b>	<b>\$330</b>	<b>82</b>	<b>\$10,331</b>	<b>\$100</b>	<b>\$10,431</b>
<b>TOTAL HOURS</b>		<b>48</b>	<b>122</b>	<b>217</b>	<b>16</b>	<b>403</b>		<b>21</b>	<b>21</b>	<b>424</b>			
<b>TOTAL LABOR COST</b>		<b>\$8,931</b>	<b>\$17,502</b>	<b>\$21,099</b>	<b>\$1,450</b>		<b>\$48,983</b>	<b>\$3,469</b>	<b>\$3,469</b>		<b>\$52,451</b>	<b>\$300</b>	<b>\$52,751</b>
<b>TOTAL COSTS</b>									<b>\$3,469</b>		<b>\$59,743</b>	<b>\$300</b>	<b>\$60,043</b>
<b>OPTIONAL TASKS</b>													
<b>Task Description</b>													
A Loop On-Board Survey Delivery (optional)		6	20	34		60	\$7,291	0	\$0	60	\$7,291		\$7,291
<b>TOTAL OPTIONAL TASK HOURS</b>		<b>6</b>	<b>20</b>	<b>34</b>	<b>0</b>	<b>60</b>		<b>0</b>	<b>0</b>	<b>60</b>			
<b>TOTAL OPTIONAL TASK COST</b>		<b>\$1,116</b>	<b>\$2,869</b>	<b>\$3,306</b>	<b>\$0</b>		<b>\$7,291</b>	<b>\$0</b>	<b>\$0</b>		<b>\$7,291</b>	<b>\$0</b>	<b>\$7,291</b>
<b>TOTAL LABOR COST</b>		<b>\$10,048</b>	<b>\$20,371</b>	<b>\$24,405</b>	<b>\$1,450</b>		<b>\$56,274</b>	<b>\$3,469</b>	<b>\$3,469</b>		<b>\$59,743</b>	<b>\$300</b>	<b>\$60,043</b>
<b>TOTAL COSTS</b>									<b>\$3,469</b>		<b>\$59,743</b>	<b>\$300</b>	<b>\$60,043</b>

