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October 21, 2020

DELIVERED VIA EMAIL

Lane Transit District
P.O. Box 7070
Springfield, OR 97475

Re: 2021–2030 Community Investment Plan (CIP) Draft

Dear LTD Board of Directors:

Thank you for continuing to serve our community while keeping people safe during the ongoing pandemic.

1. BEST has no objections to the CIP as presented.

BEST appreciates that LTD identified investments over the next 10 years; looked for sources of funding; and assembled the CIP. *As far as we can tell, these investments appear to advance LTD's and the community's goals.*

But there is no end to the COVID-19 pandemic in sight. And despite promises to the contrary, there has been no federal infrastructure package in recent years. Given such uncertainty, significant changes to planned investments should be anticipated. *As advertised, the CIP is just a framework for future decision-making—not a prediction or a promise.*

2. Future CIPs should be more helpfully organized.

Compared to previous CIPs, the current draft appears to be more inviting, with graphics, quotes and explanations for the less initiated. *Future CIPs should continue including material aimed at more casual readers.*

Indeed, we prepared our own unofficial summary of the plan:

best-oregon.org/2020/10/ltd-2021-2030-cip-open-for-public-comment

But once we dug in, we found the inclusion of so many graphics to detract from the document, getting in the way of finding the numbers we were looking for. And some basic figures we couldn't find at all.

Conceptually, the CIP can be viewed as a four-dimensional table of figures, with each axis answering different key questions:

Building a successful community by bringing people together
to promote transportation options, safe streets, and walkable neighborhoods.

Better Eugene-Springfield Transportation • PO Box 773, Eugene, OR 97440 • 541-343-5201

info@best-oregon.org • www.best-oregon.org • www.facebook.com/BetterEugeneSpringfieldTransportation

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1. ***What investments are planned?*** These are divided into Investment and State of Good Repair projects; subdivided into FTN, Fleet, Facilities, Technology, and Safety & Security projects; and finally itemized as individual projects.
2. ***When is each project planned to be funded?*** Some projects are planned for the next year, others to occur throughout the 10-year planning period, and others in out years.
3. ***What are sources of funding for each project?*** These can be federal, state, local, etc.
4. ***How certain is each source of funding?*** Tier 1 funds are secured, Tier 2 are applied for, and Tier 3 are unidentified.

Someone wishing to really dig into the figures would want to have access to the full four-dimensional table of figures. But most readers just want to see the forest for the trees, understanding the plan at a higher level before optionally digging deeper. Alas, as currently organized, it is difficult to find answers to basic questions. For example:

- What are the total planned expenditures?
- What are the subtotal planned expenditures by type (Improvement or State of Good Repair) and category (FTN, Fleet, etc.)?
- What are total planned expenditures by year?
- How much funding is anticipated from each source?
- How much funding is anticipated in each tier?

To be sure, the CIP offers answers to some of these questions. ***But the plan would serve the public better if it were organized, for example, into four major sections:***

1. Executive summary or narrative, in plain English with graphics and highlights.
2. Complete set of investment tables, in increasing order of detail, presenting figures in one place. Each set of tables should include first totals, then subtotals, and then details—all together for ease of comparison.
3. Project descriptions, providing enough detail about each project to understand what it will achieve, how it will do so, and most importantly why this is in LTD's and the community's interests, i.e., what objectives the project aims to achieve.
4. Appendices with supporting information, as was included in prior CIPs but dropped in the current one. In particular, the 2019–2028 and 2020–2029 CIPs both summarized federal, state, local and internal guiding documents; and explained in more detail various funding sources.

Moreover, BEST tried to compare the current plan to prior years to see what has changed. But the organization of the plan and the project categories used have changed so much that we could not do so. ***LTD should maintain the same organization for the CIP year to year.***

3. Projects may advance goals—but that is not clear from the CIP.

More substantatively, it is difficult to determine how much “bang for the buck” each project can be expected to deliver. ***Given limited resources, which projects are higher priority?***

To cite just one example, we see that an additional \$453,678 is proposed to be spent on MovingAhead over the next 10 years. But this amount is just a final installment in a project that totals \$3,236,067. The project might or might not be a good investment. But one can't tell from the CIP, as it provides only a cursory summary:

MovingAhead is a cooperative effort of the City of Eugene, Lane Transit District and regional partners in the community to determine what improvements are needed on some of our most important transportation corridors. This effort has been carried out through multiple phases over several years and is in the final decision-making process.

4. Develop a 10-year strategic business plan before the next 10-year CIP.

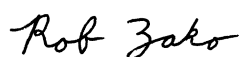
Indeed, as presented the CIP comes off as part of a yet-to-be-developed 10-year strategic business plan: the part where you get to implementing the plan and what investments are needed. ***But absent the other parts of a strategic plan, the CIP is disconnected.***

At a board retreat in March 2016, the general manager corrected noted that she, the organization and the community need a strategic business plan in order to know what to do.

Although I have no formal training in business, I am being called upon to help develop two business plans in the next few months. Regardless of the industry—selling widgets, cutting hair, or helping people get where they want to go—business plans generally include the same basic elements:

1. Mission, Vision, Philosophy (MVP): What is the purpose of the business? What change in the world does it hope to see? What values guide how the business operates?
2. Market Analysis: Who are potential customers and what do they need? Who are competitors and what do they offer? What is the state and outlook for the industry? What does a SWOT analysis reveal about the business' role in the larger market? (Serving the public in multiple ways, a public transit agency has multiple markets: riders, taxpayers, local government partners, etc.)
3. Products and Services: What does the business sell or provide?
4. Marketing Plan: How will the business attract and retain customers?
5. Operations Plan: How does the business deliver its products or services?
6. Organizational Plan: What kinds and levels of staffing are needed to market and operate? What is the governance and decision-making structure?
7. Financial Plan: Follow the money. What funding will it take to make this all work? What is the cash flow analysis?

For BEST,



Rob Zako, Executive Director
541-343-5201
rob@best-oregon.edu

P.S. Not surprising in a draft, we identified a few typos in the plan:

- The summary on page 7 is helpful. Alas, the figures do not agree with more detailed information later in the plan. For example, according to the table on page 30, the total cost of Improvement projects is \$29,464,016. But according to the summary table on page 7, the total cost of Improvement projects is \$22,464,015. Moreover, on page 7 the , \$152,891,587 listed total cost of all projects is similarly off by \$7 million. Placing all figures closer together, as we suggest, would make it easier to confirm that summary and detail figures agree.
- In the table on page 36, the Safety & Security category is duplicated.