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**PLANNING & PROGRAMMING COMMITTEE
SEPTEMBER 17, 2014**

SUBJECT: LONG RANGE TRANSPORTATION PLAN UPDATE

ACTION: APPROVE LONG RANGE TRANSPORTATION PLAN SCHEDULE AND FISCAL YEAR (FY) 2015 BUDGET AMENDMENT FOR EVALUATING A POTENTIAL TRANSPORTATION BALLOT MEASURE

RECOMMENDATION

- A. Approve the schedule in Attachment A for updating the Long Range Transportation Plan; and
- B. Amend the FY 2015 Budget to include \$550,000 in resources necessary to evaluate a potential transportation ballot measure.

ISSUE

The current Long Range Transportation Plan was adopted by the Board in 2009. Staff is seeking approval to begin work on an update to the Long Range Transportation Plan (LRTP). In June 2013 the Board directed staff to consider unmet transportation needs throughout the county for possible inclusion in an updated LRTP. This needs assessment was to be based on a bottoms-up process that gathered extensive and ongoing input from sub regions, councils of governments, cities, the County, and other stakeholders. Staff is now seeking approval to continue work on inclusion of these projects in an updated LRTP, including the exploration of a ballot measure to pay for them.

DISCUSSION

The last LRTP was adopted in 2009 and integrated the projects approved by the voters through the passage of Measure R. The new LRTP will incorporate significant changes that have occurred since the 2009 Plan was adopted, including changes in economic conditions, growth patterns, and the transportation cost and funding forecast.

It is anticipated that this plan would incorporate existing 2009 Plan projects as well as new project initiatives such as those that may be identified by the sub regions through the Mobility Matrices process. Any projects ultimately approved by the Board for a potential transportation ballot measure would be included in the financially constrained LRTP if the voters approve the measure. It is anticipated that the plan update will be

adopted after election results are known, assuming a transportation measure is placed on the 2016 ballot.

L RTP Update Process

The plan update process is expected to occur over the next several years and include various planning activities. Staff will review the performance measures of the 2009 Plan and consider performance measure updates which reflect current planning practice and Board priorities. The travel demand model will be updated to incorporate the current adopted regional demographic forecast of the Southern California Association of Governments. The financial model will be updated for current project costs of existing 2009 LRTP projects, and updated assumptions on future revenues expected to be available from federal, state, local and new funding sources over the life of the Plan. This analysis will identify uncommitted funds that could be dedicated to new projects and programs. Projects identified through the Plan update process will be modeled using the travel demand model to evaluate performance. It is anticipated that this Plan update will extend the Plan horizon year by approximately a decade beyond the termination of Measure R, to 2050.

Two significant planning processes will contribute to and coordinate with the LRTP. Attachment A is a schedule of the proposed activities and key timelines for these processes. The first is the Mobility Matrices process. At the December 2013 meeting the Board directed that a holistic countywide approach be developed for these studies. In February 2014, the Board approved staff's approach whereby sub regional working groups will develop goals and objective for analyzing unmet transportation needs. The consultant contracts have been executed and staff has begun work with all sub regions. The Gateway Cities Council of Government (COG) is completing a Strategic Transportation Plan. Metro staff has been working with the Gateway Cities COG to ensure their inclusion in the countywide, holistic approach. Metro staff and consultants will work with sub regional stakeholder working groups to develop initial unfunded project lists. This will continue with performance analyses and categorization of projects.

Financially Constrained versus Strategic Elements of the LRTP

As with past LRTPs, this update will include recommendations for constrained (funded) projects as well as strategic (unfunded) projects that could be built if additional funding becomes available, consistent with adopted Board priorities and actions. Approval of a 2016 transportation ballot measure could significantly augment the availability of new funding included in the LRTP update and increase the size of the constrained plan. The LRTP update will also revise funding recommendations for various major transportation programs, including funds available to the Call for Projects by funding category, Regional Rail/Metrolink, Access Services and other programs. The plan will also address state of good repair needs, new requirements for sustainability, and other initiatives and policies not anticipated in the 2009 LRTP.

Transportation Ballot Measure

The second of the two planning processes is an effort to explore a potential transportation ballot measure. The ballot measure effort will begin with the establishment of stakeholder working groups and the development of guiding principles. Utilizing early input from the Mobility Matrices, staff will then work with stakeholders to develop initial project lists. Polling and focus group work will be conducted to test project viability and messaging alternatives with the public. Work will continue to finalize recommended project lists, as well as funding categories and percentages that would support their implementation. Public information activities and an effort to secure enabling legislation will be discussed with the Metro Board of Directors. In May 2016, staff and stakeholder activities would culminate in a proposed ordinance and resolution, for the Board's consideration for placement on the November 2016 ballot.

Staff plans to conduct much of the work effort in-house, including two stakeholder working groups to help guide and steer the LRTP process. The first group will be a Technical Advisory Committee (TAC) Working Group consisting of geographic and technical representatives from the TAC and its subcommittees. The second will be an executive group consisting of the Metro Chief Executive Officer, the executive directors of the Councils of Governments and/or sub regional agencies, and the executive directors of key transportation planning and operating agencies with countywide span of service, including Caltrans District 7, the Los Angeles County Department of Public Works, Metro, the Southern California Association of Governments, and the Southern California Regional Rail Authority. Each element of the LRTP effort would first be analyzed by the TAC Working Group. Policy issues would be circulated up through the Executive Group for discussion and recommendation to the Board at appropriate intervals. Staff is also exploring options for reaching out to other stakeholders such as representatives from the business, environmental, and labor communities.

FY 2015 Budget Request

A limited number of activities require outside assistance. Staff is requesting authority to amend the Metro FY 2015 Budget to proceed with initial assistance needed within the next fiscal year. These costs, estimated at \$550,000, are summarized in Attachment B. Attachment C shows all ballot measure costs through FY 2017 and includes descriptions for each cost item.

DETERMINATION OF SAFETY IMPACT

This report will have no direct impact on the safety of our customers and employees.

FINANCIAL IMPACT

Impact to Budget

Proposed activities, cost centers, and estimated costs, totaling \$550,000, are listed in Attachment B. Local Funds are the identified source of funds for the recommendation. Local funds are eligible for bus/rail operating or capital expense. The bus and rail operating and capital budget and the Measure R administration budget are not impacted by the recommended action, however the Proposition A and C and Transportation Development Act (TDA) administration budget are impacted by the recommended action. The proposed activities are eligible for local funds and are a high priority use, enabling staff to explore future revenues for implementation of a robust Long Range Transportation Plan update.

Since this is a multi-year project, the cost center managers, the Board Secretary, Chief Planning Officer, Chief Communications Officer, and Deputy Executive Officer of General Services will be accountable for budgeting the cost in future years, including any options exercised.

ALTERNATIVES CONSIDERED

The Board may consider not adopting the schedule in Attachment A and to use other supporting strategies to develop and update the Long Range Transportation Plan other than the Mobility Matrices and the transportation ballot measure exploration effort. We do not recommend this alternative as the Board-directed Mobility Matrices will provide important information about subregional goals, performance objectives and project needs, and the transportation ballot measure exploration effort is important to consider potential new revenues for implementation of a robust and highly effective update to the LRTP.

The Board may consider not approving the FY 2015 Budget request and instead direct staff to conduct all work in-house or eliminate some tasks. We do not recommend this alternative, as we have maximized the use of existing staff expertise and already-budgeted FY 2015 capacity in our plan. Each of the budget request elements is necessary to lay the foundation for a transportation ballot measure that is based on reliable cost information, considers the needs and priorities of a broad spectrum of stakeholders and public sectors throughout the county, appropriate legal and legislative counsel, and a strategic information program designed to maximize the chances of passage.

NEXT STEPS

Staff are undertaking all tasks according to the timeline in Attachment A. All Mobility Matrices tasks are anticipated to be complete within 2015, while transportation ballot measure development tasks would continue to mid FY 2017, and the overall Long Range Transportation Plan update process would be completed in late FY 2017.

Long Range Transportation Plan Update tasks:

August - October 2014 – Subregional geographic analysis
October 2014 - June 2015 – Travel demand/financial model update
April 2015 - January 2016 – Performance analysis of draft project revenues and schedules

Mobility Matrices tasks:

July - August 2014 – Establish guiding principles
August - December 2014 – Subregions develop and submit initial projects
October 2014 - February 2015 – Performance analysis and final subregional project categorization

Transportation Ballot Measure exploration tasks:

September - November 2014 – Geographic analysis for regional project categories
October 2014 - February 2015 – Develop initial project lists
November 2014 - January 2015 – Conduct market research on project categories/lists
December 2014 - February 2015 – Develop project cost estimates
January - March 2015 – Develop final project lists, project categories and funding percentages
*February - April 2015 – Prepare financial plan
*March - May 2015 – Prepare draft expenditure plan and ordinance

*These timeframes are subject to change.

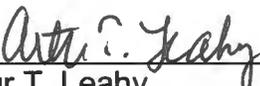
ATTACHMENTS

- A. Coordinated Planning Efforts Schedule
- B. Estimated FY 2015 Ballot Measure Costs
- C. Estimated Ballot Measure Costs and Descriptions

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ESTIMATED FY 2015 BALLOT MEASURE COSTS

(\$ in 000's)

	Cost Estimate	Cost Center	Cost Center Title
1 Project Cost Estimation**	\$150	8610	Program Management
2 Public Information - Social Media Outreach*	\$0	7010	Executive Office, Communications
3 Public Information Plan**	\$150	7010	Executive Office, Communications
4 Research Studies	\$100	4540	Regional Rideshare R&D
5 Special Counsel - Develop Ordinance, Review Legislation	\$150	1210	County Counsel
6 Technical and Subregional Outreach*	\$0	4420	Strategic Financial Planning & Programming
Total FY 2015 Costs	\$550		

*Work to be done in-house

** Staff to explore in-house or existing contract resources to complete this work

ESTIMATED BALLOT MEASURE COSTS

(\$ in 000's YOE)

	Cost Estimate	Cost Center	Cost Center Title
FY 2015 Costs			
1 Project Cost Estimation**	\$150	8610	Program Management
2 Public Information - Social Media Outreach*	\$0	7010	Executive Office, Communications
3 Public Information Plan**	\$150	7010	Executive Office, Communications
4 Research Studies	\$100	4540	Regional Rideshare R&D
5 Special Counsel - Develop Ordinance, Review Legislation	\$150	1210	County Counsel
6 Technical and Subregional Outreach*	\$0	4420	Strategic Financial Planning & Programming
Subtotal FY 2015 Costs	\$550		
FY 2016 Costs			
7 Public Information - Design of Print and Electronic Media*	\$0	7010	Executive Office, Communications
8 Public Information - Handout	\$3	7140	Customer Communications
9 Public Information - Mailer - Postage and Handling	\$900	6415	Mail Services
10 Public Information - Mailer: Paper and Printing	\$1,170	7140	Customer Communications
11 Public Information - Social Media Outreach*	\$0	7010	Executive Office, Communications
12 Public Information Plan**	\$150	7010	Executive Office, Communications
13 Research Studies	\$80	4540	Regional Rideshare R&D
14 Technical and Subregional Outreach*	\$0	4420	Strategic Financial Planning & Programming
Subtotal FY 2016 Costs	\$2,303		
FY 2017 Costs			
15 Ballot fee	\$11,700	1010	Board Office
Subtotal FY 2017 Costs	\$11,700		
TOTAL	\$14,553		

YOE = Year of Expenditure

*Work to be done in-house

** Staff to explore in-house or existing contract resources to complete this work

Description of Ballot Measure Cost Items

FY 2015 Costs

1. Project Cost Estimation, \$150,000 – This work will be led by Metro Program Management staff and is proposed to be completed using consultant resources and coordination with Caltrans staff for highway project costs. Having accurate and reliable cost information is important to maintaining realistic expectations about what mobility improvements the Long Range Transportation Plan and a potential transportation ballot measure can provide.
2. Public Information – Social Media Outreach, \$0 – This work is proposed to be done in-house. Metro staff will establish a presence on social media sites such as Twitter and Facebook to facilitate the sharing of information and encourage participation by members of the public. These activities will ensure broad-based input into the Long Range Transportation Plan and respond to the Board’s direction for a bottoms up approach to a potential transportation ballot measure. (See also item 11 for FY 2016 Social Media Outreach work)
3. Public Information Plan, \$150,000 – Rolling out a successful Long Range Transportation Plan update and pursuing new funding sources to maximize the mobility benefits of the plan requires a well-coordinated, strategic communications plan. Staff is requesting funding to obtain consultant advice and assistance to ensure good strategy is developed. (See also item 13 below for FY 16 Strategic Information Plan)
4. Research Studies, \$100,000 – Funding in FY 2015 would be used to conduct one poll and 4 in-depth focus groups. This research will allow Metro to test issues of interest and concern to the public, as well as support for individual projects and project categories. The results will help us shape the transportation ballot measure expenditure plan as well as the information program needed to achieve a successful ballot measure. (See also item 12 below for FY 16 Research Studies)

FY 2015 Costs, Continued

5. Special Counsel, \$150,000 – County Counsel proposes to retain special counsel to assist and advise Metro staff on developing ordinance language, as well as proper and strategic placement of one or more revenue vehicles on the November 2016 ballot. Special counsel would also review drafts of legislation needed to raise the statutory limitation on the sales tax for Los Angeles County.
6. Technical and Subregional Outreach, \$0 – Staff proposes to coordinate and conduct all stakeholder working group meetings using in-house resources. All graphics and analysis materials for discussion will also be produced by Metro staff departments.

FY 2016 Costs

7. Public Information – Design of Print and Electronic Media, \$0 – Metro Communications staff has capability to design attractive and cohesive materials to implement the Strategic Information Plan. (See items 8-10 below for mailing and printing costs associated with the media designed by in-house resources.)
8. Public Information – Handout, \$3,000 – This item allows for 12,000 copies of a public information handout printed in-house. This handout would be used at a variety of stakeholder meetings to inform conversation on the merits of the mobility improvements offered by the Long Range Transportation Plan Update and a potential transportation ballot measure.
9. Public Information – Mailer – Postage and Handling, \$900,000 – This item provides funding to mail an 8-16 page mailer to the voting public with in-depth information on the projects, programs and priorities proposed for the Long Range Plan and supported by a potential ballot measure. A survey conducted following the 2012 election indicated that having sufficient information about a proposed ballot measure was an important factor in voters' decisions for or against the measure.

FY 2016 Costs, Continued

10. Public Information – Mailer – Paper and Printing, \$1,170,000 – This item provides for the paper and printing to produce the mailer described in item 9 above.
11. Public Information – Social Media Outreach, \$0 – This work, to be done using in-house resources, builds on the presence established during FY 2015. During FY 2016 the focus would shift to providing information and maximizing public awareness of the Long Range Plan update and the mobility benefits the plan and the ballot measure would provide.
12. Public Information Plan, \$150,000 – This item is a continuation of item 5 above. Metro staff requires continued strategic positioning advice to keep the plan development and public and stakeholder messaging on track.
13. Research Studies, \$80,000 – This item provides funding for one poll, to make sure that the Long Range Transportation Plan development and the potential transportation ballot measure benefit from updated information about public attitudes and priorities.
14. Technical and Subregional Outreach, \$0 - This item is a continuation of item 6 above. Staff will continue to coordinate and conduct all stakeholder working group meetings using in-house resources. All graphics and analysis materials for discussion will also be produced by Metro staff departments.

FY 2017 Costs

15. Ballot Fee, \$11,700,000 – Ballot fees are due in FY 2017, following the elections. \$11,700,000 is an estimate based on the fees charged for Measure J inflated to FY 2017 dollars.