

**Member Governments**

Town of Carrboro  
Town of Chapel Hill  
County of Chatham  
City of Durham  
County of Durham  
County of Orange  
NC Department of  
Transportation  
Town of Hillsborough

**DURHAM – CHAPEL HILL-CARRBORO  
METROPOLITAN PLANNING ORGANIZATION  
TECHNICAL COORDINATING COMMITTEE (TCC)**

**AGENDA**

**April 23, 2008  
9:00 a.m.**

**City Council Committee Room  
2nd floor Durham City Hall**

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- 1. Preliminaries**
- 2. Adjustments to the Agenda**
- 3. Public Comments**

**ACTION ITEMS**

**4. Approval of March 26, 2008 TCC Meeting Minutes  
(Attachment 4)**

A copy of the March 26, 2008 minutes is enclosed as Attachment 4.

**TCC Action:** Approve minutes of the March 26, 2008 TCC meeting.

**5. STP-DA Call for Projects  
(Attachment 5, 5A)  
Ellen Beckmann, LPA Staff**

LPA staff solicited requests for STP-DA funding from the MPO's member jurisdictions. The MPO received \$53 million of requests for STP-DA funds for years FY 2009 through FY 2015. These projects include bicycle and pedestrian projects, travel demand management, transit, and LPA staff and planning activities. Assuming that the MPO receives approximately \$4 million in STP-DA per year, the MPO only has about \$28 million of STP-DA for years FY 2009 through FY 2015. Furthermore, a portion of the MPO's STP-DA funds are already programmed for FY 2009 through FY 2015. As a result, all of the STP-DA requests will not be able to be filled.

The TCC and TCC subcommittee have considered several options for the allocation of STP-DA funds. At the March TAC meeting, the TAC approved a general distribution of STP-DA funds in FY 2009 through 2015. At the April TAC meeting, the TAC approved funding for staff and planning activities. The TCC Subcommittee met on April 16, 2008 to discuss the remaining Annual Reserve, Transit, and Local Discretionary funds and to develop criteria for selecting Annual Reserve projects.

Attachment 5 is a staff memo that provides background on the issues. Attachment 5A is the STP-DA allocation spreadsheet that includes the subcommittee's recommendations.

**TCC Action:** Recommend that the TAC approve STP-DA funding for the Annual Reserve, Transit, and Local Discretionary categories as shown in Attachment 5A.

**6. Job Access Reverse Commute and New Freedom Call for Projects**  
**(Attachment 6, 6A, 6B, 6C, 6D, 6E)**

**Ellen Beckmann, LPA Staff**

The MPO receives an annual allocation of Job Access Reverse Commute (JARC) and New Freedom (NF) funds. JARC is targeted for improving transportation for low income populations and NF is targeted at persons with disabilities. The MPO opened the 2008 Call for Projects in December 2007 with an application deadline of February 28, 2008. An applicant workshop was held in January. The MPO received two applications for NF (Attachments 6A and 6B) and three applications for JARC (Attachments 6C, 6D, and 6E). The TCC subcommittee met on April 3, 2008 to review the applications and make recommendations for funding. The TCC subcommittee's recommendations are shown in Attachment 6.

**TCC Action:** Recommend that the TAC approve funding projects using Job Access Reverse Commute and New Freedom funds.

**7. Congestion Relief/Intermodal Transport Fund**  
**(Attachment 7, 7A, 7B)**

**Mark Ahrendsen, TCC Chair**

The General Assembly established the 21<sup>st</sup> Century Transportation Committee to study transportation infrastructure needs in the State. Meeting agendas and copies of presentations are posted on the committee's website:

<http://www.ncleg.net/gascripts/DocumentSites/browseDocSite.asp?nID=32>. The committee has also formed four subcommittees: Finance, Intergovernmental, Prioritization/Best Practices/Efficiency, and Intermodal. An interim report for the committee may be submitted by May 1, 2008 and the final report is due December 31, 2008.

Attachment 7 is a report from the Intermodal subcommittee. The Intermodal subcommittee has proposed new legislation titled the Congestion Relief/Intermodal Transport Fund (Attachment 7A) which would provide funding for public transportation, freight and passenger rail, and ports. The TAC reviewed this legislation at the April meeting and has asked staff to develop a list of principles to be included in the bill to address the DCHC MPO's concerns. A draft position paper with suggested language changes is included as Attachment 7B. The General Assembly may consider this bill during the short session.

**TCC Action:** Develop a list of principles regarding the proposed Congestion Relief/Intermodal Transport Fund.

**8. Sidewalks and Bike Facilities on Bridges**  
**(Attachment 8, 8A)**

**Dale McKeel, LPA Staff**

There are numerous bridges and culverts in the DCHC area which do not have adequate sidewalks and bicycle accommodations. As development occurs in more rural areas and efforts are made to add sidewalks and bicycle facilities, these bridges present a barrier to bicycle and pedestrian travel. On the Old Durham-Chapel Hill Road project, for instance, separate sidewalks and bike lanes will be provided on most of the corridor, but on the bridges over I-40 and New Hope Creek, bicyclists and pedestrians will have to share a narrow shoulder.

Despite NCDOT and AASHTO policies that support routine accommodation of bicycles and pedestrians, some bridges in the DCHC area are being designed without adequate bicycle and pedestrian facilities. For example, a bridge replacement project on Pickett Road in Durham (B-4109) will include wide shoulders but will not include sidewalks (Attachment 8).

In order to provide routine accommodation of pedestrians and bicyclists in future projects, it is recommended that the TAC adopt a resolution (Attachment 8A) which adopts as policy that the standard design for all bridges and culverts constructed by NCDOT in the DCHC area will include sidewalks on both sides and adequate pavement width for the future provision of bicycle facilities, and that any deviation from this standard design on a particular bridge or culvert shall be made only after written consultation and concurrence from the DCHC MPO and all affected local governments.

**TCC Action:** Recommend that the TAC adopt a resolution adopting a policy for the standard design of all bridges and culverts constructed by NCDOT in the DCHC MPO.

**9. Farrington Road Corridor Study**  
**(Attachment 9)****Felix Nwoko, LPA Staff**

The Farrington Road Corridor Study assessed existing and future congestion in a study area that included southern Durham and Orange Counties and northeast Chatham County. It included an analysis of transportation corridors and land use in the study area using the travel demand model and a land use modeling tool (CommunityViz). The desired outcome of the study is to recommend transportation improvements and land use policy changes. Consultants with Kimley-Horn and Associates will present a report of this project. Attachment 9 is a copy of a presentation that was given to the TCC subcommittee in February. An updated presentation will be provided at the meeting.

**TCC Action:** Receive a presentation on the Farrington Road Corridor Study.

**10. FY 2009-2015 Metropolitan Transportation Improvement Program**  
**(Attachment 10, 10A)****Ellen Beckmann, LPA Staff**

The State Board of Transportation released the draft 2009-2015 STIP on October 31, 2007. The DCHC MPO released the supplement to the draft STIP as the draft MTIP in January and held a public hearing in February. In addition, NCDOT held public comment meetings on the STIP in

February. One-on-one meetings for Division 5 and Division 7 were held in February and March. The agendas for the one-on-one meetings are included as Attachment 10 and 10A.

NCDOT has not sent an official response to the one-on-one meetings yet. NCDOT staff has reported that the final 2009-2015 STIP will be approved by the State Board of Transportation in June. The 2009-2015 MTIP and conformity report must be approved by September 2008. The TCC should discuss the process for developing the final 2009-2015 MTIP.

**TCC Action:** Discuss the development of the final 2009-2015 MTIP.

**11. 2035 Long Range Transportation Plan and Comprehensive Transportation Plan – LRTP Alternatives and Land Use Scenarios**

**(No Attachment)**

**Andy Henry, LPA Staff**

The LPA and other transportation planning staff in the region are collaborating on key tasks including developing the STAC transit network, LRTP Alternatives network and SE Data for the land use scenarios. Several work sessions and meetings will take place in the days leading up to the TCC meeting. As a result, the LPA staff will provide an update on the progress of these tasks and the 2035 LRTP schedule.

**TCC Action:** Receive update and provide comments.

**12. National Ambient Air Quality Standards for Ozone**

**(Attachment 12)**

**John Hodges-Copple, TJ COG**

The U.S. Environmental Protection Agency issued a revised primary and secondary National Ambient Air Quality Standard for ozone on March 12, 2008. The revised more-stringent primary standard for ozone was set at 0.075 parts per million (ppm) measured over an 8-hour period. EPA has revised the secondary standard, designed to protect welfare, at 0.075 ppm making it identical to the primary standard. The existing ozone standard was set in 1997 at 0.08 ppm.

EPA is expected to finalize the nonattainment designations by March 2010 based on these revised standards. According to this schedule, conformity will apply in 2011, one year after the final nonattainment designations become effective. More details on the revised standards are available at <http://www.epa.gov/groundlevelozone/actions.html>. Attachment 12 is a brief presentation on the impact of the new standards on the Triangle.

**TCC Action:** Receive a presentation on the new National Ambient Air Quality Standard for ozone and the implications for the Triangle

**REPORTS FROM STAFF:**

**13. Reports from Staff**  
**(Attachment 13)**

**Felix Nwoko, LPA Staff**

**TCC Action:** Receive Report from staff

**14. Report from the Chair**

**Mark Ahrendsen, TCC Chair**

**TCC Action:** Receive Report from TCC Chair

**15. NCDOT Report**

**(Attachment 15)**

**Wally Bowman, Division 5 – NCDOT**

**Mike Mills, Division 7 – NCDOT**

**INFORMATIONAL ITEMS**

Recent News Articles will no longer be included in the TCC agenda. See this month's TAC agenda for this information.

**Adjourn**

**Next meeting: May 28, 2008**

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**TECHNICAL COORDINATING COMMITTEE**

**March 26, 2008**

**MINUTES OF MEETING**

- \*Mark Ahrendsen City of Durham – Transportation (TCC Chair)
- \*Jamal Alavi NCDOT – TPB
- \*David Bonk Town of Chapel Hill
- \*Stanley Buff NCDOT – Division 5 Engineer
- \*Andy Henry City of Durham – Transportation
- \*John Hodges-Copple Triangle J COG
- \*Tom King Town of Hillsborough
- \*Karen Lincoln Orange County Planning
- \*Ray Magyar UNC – Transportation
- \*Patrick McDonough Triangle Transit
- \*Adena Messinger Town of Carrboro
- \*Ryan Mickles Town of Chapel Hill
- \*Felix Nwoko City of Durham – Transportation
- \*Liz Rooks Research Triangle Foundation
- \*Brad Wall NCDOT – Division 7 Engineer
- \*Scott Walston NCDOT
- Ellen Beckmann City of Durham - Transportation
- Dale McKeel City of Durham – Transportation
- Dawn Qiu City of Durham – Transportation
- Jill Stark FHWA
- Kenneth Withrow CAMPO

\*Voting Member

Mark Ahrendsen, TCC Chair, called the meeting to order at 9:05 a.m.

**PRELIMINARIES:**

**Adjustments to the Agenda**

Mark Ahrendsen made an adjustment to the agenda. The item is related to the Administrative Modification to the 2007-2013 TIP and will be addressed after agenda item #8.

**Public Comments**

There were no public comments.

**ACTION ITEMS:**

37 **Approval of February 27, 2008 TCC Meeting Minutes (Attachment 4)**

38 A motion was made by Felix Nwoko and seconded by David Bonk to approve the  
39 February 27, 2008 TCC Meeting Minutes. The motion carried unanimously.

40 **STP-DA Call for Projects (Attachments 5 and 5A)**

41 Ellen Beckmann provided an introduction for the STP-DA Call for Projects, along with  
42 the attachments. Ellen also distributed a handout at the beginning of the meeting that is a  
43 supplement to attachment 5A. The subcommittee met last week to recommend the funding of  
44 specific projects within each category on the tables. That is what is in attachment 5A, but it is  
45 not complete because the subcommittee did not complete the recommendation for funding within  
46 all the categories. Ellen is not certain what needs to be recommended by the TCC today. Some  
47 of the STP-DA funding is in the UPWP so it needs to be approved with the UPWP. NCDOT has  
48 asked for project information for the 2009-2015 TIP by the end of March 2008. If there are any  
49 projects that need to be listed under a unique TIP number in the TIP and have a let date or  
50 contract date by the end of the calendar year, these need to be included in the recommendation.

51 David Bonk asked if we expect the STP-DA funds, if allocated to a transit project, to be  
52 flexed into federal transit funds. The reserve funds do not have an allocation process.

53 Felix Nwoko stated that the STP-DA line in the TIP will include the STP-DA for the  
54 MPO. If it is for a planning project, it has to be in the UPWP which can be amended.

55 Ellen stated that Rick Lakata at NCDOT emailed her and stated it might be difficult to get  
56 quick turn-around TIP amendments this year because it is a new TIP. There may be a lag period  
57 where we can't do an amendment. The deadline is March 31, 2008 for the final TIP. Ellen  
58 stated that the TAC will approve the UPWP in April and the STP-DA funds in May 2008.

59 Mark Ahrendsen stated that the State is trying to reflect what we would like to see in their  
60 2009-2015 STIP.

61 David Bonk stated that the Town of Chapel Hill could not have the program by March  
62 31, 2008. Mark stated that he did not want to rush anyone not ready to move forward; but he  
63 does not want to hold those up that already know their allocation. David stated that the reserve  
64 needs to be allocated based on a process yet to be determined and following rules yet to be  
65 prepared. Felix asked if there is a down-side to moving ahead approving the STP-DA today;  
66 because we can always amend it. The TAC has given us a structure. David stated that he  
67 doesn't mind approving what was approved in terms of the allocation to the different categories.  
68 David stated he is very uncomfortable in approving details within the categories unless there is  
69 an attachment stating "at this point."

70 Ellen stated that we don't know if there is a limit to front-loading the funds. David stated  
71 that the carry-over money was sub-allocated for distribution in equal parts across the seven year  
72 program. Ellen stated since we will be front loading in the "actual" rows on the attachment,  
73 there will be more funding in FY 2009-2010. Ultimately when all the cells are completed, the  
74 total and budgeted should match the pie chart. The overall distribution matches what the TAC  
75 approved last month.

76 Mark Ahrendsen recommended moving forward with what is ready. Mark doesn't want  
77 to put anyone at a disadvantage; but we don't want to hold up the ones that are ready. Ellen  
78 stated the only thing we can't do is the annual reserve because we need to meet more regarding  
79 this category. There are a few planning projects on that table. The additional funding for the  
80 ITS Deployment Plan, Commercial Vehicle Study and Parking Study needs to be decided on  
81 since they are in the UPWP. David Bonk asked why are these being proposed under the reserve

82 as opposed to extra planning table. Ellen stated it could be in either, the only reason she put it in  
83 there is because they are less than \$200,000. Ellen stated that part of the reason for having an  
84 annual reserve is so we have some funding for planning projects that arise at the last minute.  
85 Ellen stated that this year is a little different because we are trying to plan for all the large extra  
86 planning projects for the next seven year plus the cost overruns or extra funds needed for  
87 planning projects in 2009 at the same time.

88 David Bonk asked if we and/or the TAC set a policy about the size of a project. Based on  
89 the original projects that were submitted, Ellen stated that \$200,000 seemed to be a good cutoff  
90 point between the small and large projects.

91 David Bonk suggested going forward with the categories with the estimated totals for  
92 each category based on the adopted formula that the TAC discussed at the last meeting and  
93 providing detail within the categories with a caveat that we still have to resolve the issue of  
94 scheduling the expenditure of funds, as well as, under the reserve table dealing with multiple  
95 requests for funds with a limited amount of money.

96 Ellen Beckmann stated that two projects on the local discretionary table, the NC 147  
97 bike/pedestrian bridge and Cornwallis Road are in 2009 and are listed as separate TIP projects.  
98 Do these need to be approved and Dale McKeel stated it would be better to reflect the NC-147  
99 bike/pedestrian bridge in the TIP. Ellen stated that the Nash Street sidewalk project in  
100 Hillsborough would not need to be listed because it can fall under the general TIP project.

101 John Hodges-Copple stated it was discussed to have a placeholder amount for follow up  
102 studies that may arise from the STAC process. It looks like we now have \$600,000 devoted to  
103 two specific projects and he is not sure we want to get that specific right now or simply say  
104 transit studies and determine the best way to move forward. David Bonk stated his concern is

105 that will \$600,000 be enough or should we allocate more funds as a placeholder for a yet to be  
106 determined set of environmental and planning studies. Patrick McDonough stated it could be  
107 called transit studies which would encompass STAC follow-up, Durham Circulator, and CH-  
108 BRT. Mark Ahrendsen stated there is a consensus to include \$600,000 transit studies as a  
109 placeholder in FY 2009 along with the other identified planning tasks, as well as, the LPA and  
110 routine planning table to reflect the UPWP. David Bonk asked if we should move the LPA  
111 Planning requests that are now showing in the annual reserve table to the planning table. David  
112 said it should not change any of the sub-allocated numbers. Ellen Beckmann stated if items are  
113 taken out of the annual reserve and put into the planning table it will decrease the funding for  
114 transit, regional bike and local discretionary. If it is in the annual reserve, it means once requests  
115 from everyone for the annual reserve we will have less funds.

116 Ellen stated we have so much for each year, 15% is taken out for the annual reserve,  
117 subtract the staff and routine planning and extra planning, and then the remainder of that is split  
118 into three categories; 25% transit, 25% regional bike, and 50% local.

119 John Hodges-Copple stated as we move through it and in 2009 we don't use our annual  
120 reserve; what happens to it and Andy Henry stated it will be available in subsequent years. Ellen  
121 stated it goes in the annual reserve.

122 A motion was made by Felix Nwoko and seconded by Jamal Alavi to approve the UPWP  
123 planning projects and the STP-DA process and formula. David Bonk stated the TCC will  
124 provide the tables that show the totals that come out of the formula, with some additional details  
125 as they become available. Felix stated it will include the NC-147 bridge and planning projects.  
126 The transit planning projects will be moved to FY 2009 for \$600,000. The motion carried  
127 unanimously.

128 **2035 Long Range Transportation Plan and Comprehensive Transportation Plan – LRTP**  
129 **Alternatives and Land Use Scenarios (Attachment 6)**

130  
131           Andy Henry provided an introduction for the 2035 Long Range Transportation Plan and  
132 Comprehensive Transportation Plan – LRTP Alternatives and Land Use Scenarios, along with  
133 the attachment. Andy described the handouts that we distributed at the beginning of the meeting.

134           There was discussion to change the name of the Comprehensive Transportation Plan  
135 alternative to the vision plan. John Hodges-Copple stated that since there will be a round two,  
136 call it the CTP in the second round.

137           Scott Walston stated that the number of scenarios needs to be cut, as nineteen is too  
138 many. It will take 190 hours to run the models.

139           John Hodges-Copple stated that we need to be realistic about our resources. System  
140 Preservation is not accounted for in the model. Felix Nwoko stated that we don't need new  
141 model runs for all of the alternatives. David Bonk stated that the System Preservation  
142 Alternative is actually a policy decision because the model doesn't account for ITS, TDM, or  
143 even land use details. Mark Ahrendsen stated that the TCC promised we were going to do land  
144 use. John Hodges-Copple stated that TDM is only a policy issue and also is not in the model.

145           Andy Henry stated that alternative 2 will be done post-LRTP; alternative 6 is not  
146 accounted for in the model; and alternative 8 is deleted.

147           Patrick McDonough stated that we need to figure out if the changes we are making in the  
148 model are to density, diversity of urban design, and policy. David Bonk stated that we need to  
149 use ITS for fixed guideways and bus transit.

150           Scott Walston stated that twelve alternatives are too many. Why doesn't the TCC run the  
151 2030 LRTP with three or four alternatives and adjust accordingly, as the staff will be burdened  
152 by running all these alternatives.

153 David Bonk stated the staff effort here is to decide what is in and what is out with each  
154 alternative and apply fiscal constraint.

155 Kenneth Withrow stated that CAMPO supported alternatives 1, 3, 4, and 5. John  
156 Hodges-Copple suggested making 3, 4, and 5 similar in cost. Mark Ahrendsen stated he agrees  
157 with John.

158 Andy Henry asked if this needed to be taken to the TAC and Mark Ahrendsen stated we  
159 don't need to take it to the TAC; they only need the results.

160 Felix Nwoko stated the subcommittee will review the resource needs and bring back to  
161 the TCC next month.

162 **FY 2008-2009 Unified Planning Work Program (Attachments 7 and 7A)**

163 Felix Nwoko provided an introduction for the FY 2008-2009 Unified Planning Work  
164 Program, along with the attachments.

165 A motion was made by Felix Nwoko and seconded by Karen Lincoln to recommend that  
166 the TAC approve the resolutions and self-certification adopting the FY 2008-2009 Unified  
167 Planning Work Program emphasizing that amendments can occur before March 1. The motion  
168 carried unanimously.

169 **FY 2009-2015 Transportation Improvement Program – Air Quality Conformity**  
170 **Determination Report (Attachment 8)**

171  
172 John Hodges-Copple provided an introduction for the FY 2009-2015 Transportation  
173 Improvement Program – Air Quality Conformity Determination Report, along with the  
174 attachment.

175 The Air Quality report has been released. John is going to check with Eddie Dancausse  
176 about the deadline for adopting this and what it means in terms of the TIP adoption. Jill Stark

177 stated that the air quality must be adopted before the LRTP. John Hodges-Copple stated we need  
178 to resolve the timeline for the STIP, LRTP, and AQ.

179 **Adjustment to the Agenda (Administrative Modification #2)**

180 Mark Ahrendsen stated there is a Resolution Adopting an Administrative Modification to  
181 the 2007-2013 Transportation Improvement Program for the Durham-Chapel Hill-Carrboro  
182 Urban Area.

183 Patrick McDonough stated the administrative modification is so Triangle Transit can use  
184 an earmark and left-over 5307 money.

185 A motion was made by Felix Nwoko and seconded by John Hodges-Copple to approve  
186 the Resolution Adopting an Administrative Modification to the 2007-2013 Transportation  
187 Improvement Program for the Durham-Chapel Hill-Carrboro Urban Area. The motion carried  
188 unanimously.

189 **REPORTS FROM STAFF:**

190 Adena Messinger stated that the Town of Carrboro received a grant from NCDOT to do a  
191 bicycle plan. We have a public workshop scheduled April 10, 2008 from 4:30 p.m. until 7:30  
192 p.m. Please come and provide feedback. There will be another workshop in the summer.

193 **Report from Staff (Attachment 9)**

194 Felix Nwoko stated that a presentation was made to the TCC subcommittee regarding the  
195 Stagecoach Farrington Road Study and they will be making a presentation to the TAC at their  
196 next meeting.

197 Ellen Beckmann stated she will be scheduling a transit subcommittee meeting next week  
198 to go over the JARC/New Freedom applications.

199 **Report from Chair**

200 Mark Ahrendsen stated that the STAC is trying to finish their work by the end of April.  
201 At that time, a joint TAC meeting will hopefully be held before our regularly scheduled TAC  
202 meeting. There was a public hearing on the Triangle Parkway last night and was well attended.

203 **NCDOT Report (Attachment 11)**

204 Brad Wall, NCDOT Division 7 Engineer, was available for questions. Regarding the  
205 Superstreet, they are looking at the signals, crosswalks and lighting. The reports are attached for  
206 both divisions are attached for review.

207 **INFORMATIONAL ITEMS:**

208 **Recent News Articles (Attachment 12)**

209 The recent news articles are attached.

210 **Adjournment**

211 There being no further business before the Technical Coordinating Committee, the  
212 meeting was adjourned at 11:12 a.m.

**MEMORANDUM**

**TO: Technical Coordinating Committee  
DCHC MPO**

**FROM: DCHC MPO Lead Planning Agency**

**DATE: April 23, 2008**

**SUBJECT: STP-DA Call for Projects**

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The TCC STPDA Subcommittee met on April 16, 2008 to develop criteria for the selection of Annual Reserve projects and to develop a recommendation for the use of the DCHC MPO's STP-DA funds for FY 2009-2015.

**Annual Reserve Selection Criteria**

For Annual Reserve projects, the TCC subcommittee developed the following list of requirements:

1. There is a \$200,000 cap for non-planning projects. There is no cap for planning projects.
2. The funding must be spent in the fiscal year for which it is programmed. Recipients should prepare a status report every six months. If funding is not used in that fiscal year, the funds can be reprogrammed. The applicant can apply for funding for the same project again.
3. For Triangle Transit projects that are regional in nature (i.e. vehicle purchases), funding will be provided as a 50/50 split with the Capital Area MPO. Triangle Transit must present a written letter from the Capital Area MPO indicating that the LPA staff will recommend the use of STP-DA funding on the project.

The TCC subcommittee developed the following list of selection criteria for Annual Reserve projects:

1. Priority will be given for requests from agencies that do not receive a designated allotment of STP-DA funds.
2. Priority will be given for cost over-runs for projects funded from other STP-DA categories. Secondary priority will be given for cost over-runs for projects funded through other sources.
3. Priority will be given for projects that will provide a local match exceeding 20%.

### **Step 3 – Allocate STP-DA funds to specific projects within each category**

The Subcommittee's recommendations for the Annual Reserve, Transit, and Local Discretionary projects are highlighted in yellow in Attachment 5A. All funding of specific projects within each category must be presented to the TAC for approval. There is no sub-allocation of funding directly to member governments.

**Annual Reserve (Small Projects)** – The TAC approved three LPA planning projects at the April TAC meeting. This was also incorporated into the final FY 2008-2009 UPWP. The Subcommittee developed a recommendation for the remainder of the Annual Reserve as shown in the top table in Attachment 5A. The funding recommendation for the two Triangle Transit vehicle purchase projects is dependent upon the receipt of a letter from the Capital Area MPO indicating that staff will recommend using STP-DA for 50% of these project costs. The bottom table in Attachment 5A displays all of the project requests for this category.

**Staff and Routine Planning** – The TAC approved LPA staff and planning projects at the April TAC meeting. This was also incorporated into the final FY 2008-2009 UPWP.

**Extra Planning** – The TAC approved extra planning projects at the April TAC meeting. This was also incorporated into the final FY 2008-2009 UPWP.

**Transit** - The Subcommittee developed a recommendation for the transit category as shown in Attachment 5A.

**Regional Bicycle and Pedestrian** – Two projects have already been approved that fall into this category. The TCC will develop a recommendation for the remainder based on regional priority corridors. LPA staff intends to formally identify regional connections including soliciting input from the public and local transportation boards. This will be done as part of the 2035 LRTP. A recommendation for this category will be brought to the TAC later this year. The Town of Chapel Hill has proposed a new project for this category – the Morgan Creek Greenway. The Subcommittee recommends considering this project during the process to develop regional priority corridors.

**Local Discretionary** – The Subcommittee developed a recommendation for the local discretionary category as shown in Attachment 5A.

### **Fiscal Year Balance**

NCDOT staff have informed the LPA that the annual FY expenditures and STP-DA funds do not need to be balanced. The MPO can run a deficit and are encouraged to over-program in the early years to use up unobligated funds before they expire. The total programmed over the seven years must not exceed the sum of the federal STP-DA annual apportionments (with the 86% obligation ceiling applied) plus the uncommitted balance from previous years.

There is a limit to the over-programming of funds. The MPO cannot obligate more in any given year than its unobligated balance plus the federal STP-DA annual apportionment. The unobligated balance is not the same as the uncommitted balance because the MPO has committed to projects pre-FY 2009 that have not yet been obligated. Obligation occurs when an agreement has been approved for the project. Currently, the MPO's uncommitted balance is \$3,969,060 and the unobligated balance is \$10,160,257 meaning that there is \$6,191,197 of projects programmed but not obligated yet.

On the first page of Attachment 5A, there are rows showing the MPO's federal STP-DA apportionment, the unobligated balance, and the obligation limit. The Subcommittee's recommendation for FY 09 programs a total of \$9,442,413. The obligation limit is \$14,784,830. The Subcommittee delayed projects so that the programming in FY 09 was safely under the obligation limit since there are many pre-FY 2009 projects that may be obligated this year. The Subcommittee's recommendation DOES NOT meet the obligation limit in FY 10 and 11 as shown in red. Projects will need to be delayed. The Subcommittee deferred addressing this issue at this time.

Another issue to note is that since the STP-DA annual allocation was assumed to be constant, but may increase (following past trends), there may be funding available for additional projects in later fiscal years. The MPO will need to address this issue in future years as additional funding becomes available.

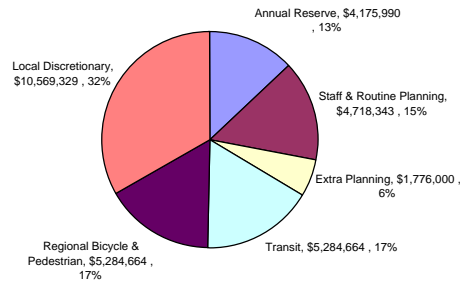
**TCC Action:**

Recommend that the TAC approve STP-DA funding for the Annual Reserve, Transit, and Local Discretionary categories as shown in Attachment 5A.

DCHC MPO -- STP-DA Allocation Table (FY 2009-2015) proposal  
Summary Table

		Prior Years	FY 03	FY 04	FY 05	FY 06	FY 07	FY 08	FY 09	FY 10	FY 11	FY 12	FY 13	FY 14	FY 15	TOTAL	Budgeted	Remaining	
Pre-FY2009	Total	\$14,217,737	\$4,542,360	\$1,877,640	\$475,781	\$2,968,819	\$6,369,478	\$4,363,579								\$34,815,394			
	STP-DA	\$18,059,826	\$2,732,775	\$3,211,059	\$3,632,240	\$3,554,356	\$4,083,112	\$3,977,133								\$39,250,501			
	FY BALANCE	\$0	(\$1,809,585)	\$1,333,419	\$3,156,459	\$584,048	(\$2,286,478)	(\$386,446)											
	Uncommitted Balance	\$3,377,643	\$1,568,058	\$2,901,477	\$6,057,936	\$6,641,984	\$4,355,506	\$3,969,060											
Post-FY2008	Annual Reserve								\$596,570	\$596,570	\$596,570	\$596,570	\$596,570	\$596,570	\$596,570	\$4,175,990	\$4,175,990	\$0	
	Staff & Routine Planning								\$548,625	\$644,956	\$664,173	\$683,964	\$704,344	\$725,333	\$746,948	\$4,718,343	\$4,718,343	\$0	
	Extra Planning								\$1,476,000	\$300,000	\$0	\$0	\$0	\$0	\$0	\$1,776,000	\$1,776,000	\$0	
	Transit								\$3,042,332	\$2,242,332	\$0	\$0	\$0	\$0	\$0	\$5,284,664	\$5,284,664	\$0	
	Regional Bicycle & Pedestrian								\$1,961,500	\$1,961,500	\$0	\$0	\$0	\$0	\$0	\$3,923,000	\$5,284,664	\$1,361,664	
	Local Discretionary								\$1,817,386	\$6,030,257	\$2,382,700	\$46,640	\$67,000	\$0	\$0	\$10,343,983	\$10,569,329	\$225,346	
Actual	Total								\$9,442,413	\$11,775,615	\$3,643,443	\$1,327,173	\$1,367,914	\$1,321,903	\$1,343,518	\$30,221,980			
	STP-DA (with obligation limit)								\$3,977,133	\$3,977,133	\$3,977,133	\$3,977,133	\$3,977,133	\$3,977,133	\$3,977,133	\$27,839,931			
	FY BALANCE								(\$5,465,280)	(\$7,798,482)	\$333,690	\$2,649,960	\$2,609,219	\$2,655,230	\$2,633,615				
	Uncommitted Balance								(\$1,496,220)	(\$9,294,702)	(\$8,961,012)	(\$6,311,052)	(\$3,701,834)	(\$1,046,604)	\$1,587,011				
	Federal STP-DA Apportionment								\$4,624,573	\$4,624,573	\$4,624,573	\$4,624,573	\$4,624,573	\$4,624,573	\$4,624,573				
	Unobligated Balance at beginning of FY								\$10,160,257	\$5,342,417	(\$1,808,625)	(\$827,494)	\$2,469,905	\$5,726,564	\$9,029,233				
	FY Obligation Limit (Federal Apportionment + Unobligated Balance)								\$14,784,830	\$9,966,990	\$2,815,948	\$3,797,079	\$7,094,478	\$10,351,137	\$13,653,806				

FY 2009-2015 STP-DA Summary Budgeted



DCHC MPO -- STP-DA Allocation Table (FY 2007-2013) approved April 9 2008 with new Budget from NCDOT

Projects Pre-FY03 are hidden.

TIP #	Location	Description	Status	Total Cost	Prior Years	FY 03	FY 04	FY 05	FY 06	FY 07	FY 08	Non-Fed Match	Agency
<b>DURHAM COUNTY</b>													
23	-306 C	I-85 C (115-501 to Broad)	Complete	\$1,403,204	\$0	\$1,122,583						\$280,641	Durham
24	-306 C	I-85 C (115-501 to Broad)	Complete	\$588,654	\$0	\$447,723						\$111,931	Durham
25	-306 C	I-85 C (115-501 to Broad)	Complete	\$95,842	\$0	\$75,074						\$18,768	Durham
26	-306 C	I-85 Hillandale Commons	Complete	\$25,000	\$0			\$20,000				\$20,000	Private
27	-306 C	I-85 Islands - Hillandale and Guess Roads	Complete	\$75,000	\$0			\$60,000				\$15,000	Durham
28	-306 DB	I-85 DB (Broad to Camden)	Complete	\$133,300	\$0			\$106,640				\$26,660	Durham
29	U-4009	US 15-501	Complete	\$285,000	\$0	\$228,000						\$57,000	Durham
30	U-3804	Hillandale Rd	Design	\$0	\$0							\$0	State
31	R-2906	MLK ROW/Extension	Complete	\$2,700,000	\$0	\$2,160,000						\$540,000	State
32	R-2906	NC 55 Widening Project	Complete	\$430,000	\$0	\$344,000						\$86,000	State
33	U-4010	NC 98 (Holloway Street)	Construction	\$2,795,000	\$0					\$2,236,000		\$559,000	State
34	U-4011	Miami Blvd.	Design	\$2,342,500	\$0						\$1,874,000	\$468,500	State
<b>ORANGE COUNTY</b>													
17	E-4994	Carrboro	?	\$807,500	\$0						\$56,000	\$161,500	Carrboro
18	E-4828	Carrboro	Design	\$650,000	\$0				\$40,000	\$480,000		\$130,000	Carrboro
19	E-4008	Carrboro	Complete	\$168,695	\$0			\$45,600	\$89,356			\$33,739	Carrboro
20	TD-4711C	Chapel Hill	Complete	\$4,788,330	\$0		\$560,000		\$1,600,000	\$1,670,664		\$957,666	Chapel Hill
21		Chapel Hill	Complete	\$1,000,000	\$0	\$900,000						\$200,000	Chapel Hill
22	E-4601	Chapel Hill/Carrboro	Design	\$900,000	\$0			\$80,000		\$640,000		\$180,000	CH/Carrboro
23	E-4995	Chapel Hill	On-going	\$780,000	\$0					\$64,000	\$560,000	\$156,000	Chapel Hill
24	U-4704	Chapel Hill-Carrboro	Design	\$450,000	\$0					\$360,000		\$90,000	CH/Carrboro
<b>MPO-WIDE</b>													
5	U-4726	MPO/Various Local Gov't.	Urban Area Bike/Ped Allocation	\$1,140,379	\$0	\$0	\$0	\$71,524	\$317,600	\$228,600	\$294,579	\$228,076	Multiple
6	U-4726A	CAR - Hamm Street Sidewalk	Complete	\$60,452	\$0			\$55,564				\$5,888	Carrboro
7	U-4726B	CAR - Bolin Forest Drive Sidewalk	Complete	\$19,950	\$0			\$15,960				\$3,990	Carrboro
8	U-4726C	CH - Culbreth Rd	Complete	\$45,000	\$0							\$9,000	Chapel Hill
9	U-4726D	04 bike/ped allocation	DUR - Bicycle Pedestrian Plan	\$93,750	\$0				\$86,000		\$15,000	\$18,750	Durham
10	U-4726E	05 bike/ped allocation	CH - Airport Road	\$50,000	\$0				\$40,000			\$10,000	Chapel Hill
11	U-4726F	03-04 bike allocation	CH - Chapel Hill Sidewalks	\$250,000	\$0					\$200,000		\$50,000	Chapel Hill
12	U-4726G	05 bike/ped allocation	DUR - Holloway St sidewalks	\$67,000	\$0				\$53,600			\$13,400	Durham
13	U-4726H	05 bike/ped allocation	DUR - Bike Education	\$60,000	\$0						\$48,000	\$12,000	Durham
14	U-4726K	06 bike/ped allocation	DUR - Hillandale/Club to I-85 5' sidewalk on both sides	\$165,484	\$0						\$132,387	\$33,097	Durham
15	U-4726L	06 bike/ped allocation	CH - Fordham Blvd sidewalk NE Fordham/Estes Dr.	\$15,000	\$0				\$12,000			\$3,000	Chapel Hill
16	U-4726M	06 bike/ped allocation	CH - Drainage gate replacement (NC 98)	\$10,000	\$0				\$8,000			\$2,000	Chapel Hill
17	U-4726N	06 bike/ped allocation	Walkable Communities Workshop (MPO)	\$17,000	\$0					\$13,600		\$3,400	MPO
18	U-4726O	07 bike/ped allocation	DUR - Capenter Fletcher Rd/Woodcroft- Alston bike impr	\$142,740	\$0						\$114,192	\$28,548	Durham
19	U-4726P	07 bike/ped allocation	CH - Culbreth Rd/15501-Culbreth Park Dr sidewalk	\$135,000	\$0				\$108,000			\$27,000	Chapel Hill
20	U-4727	MPO -UPWP	MPO Planning	\$3,800,000	\$1,510,000	\$165,000	\$273,000	\$228,657	\$224,380	\$265,963	\$373,000	\$760,000	Multiple
21			UPWP Planning \$165,000										
22			MPO Bike Ped Planner Position \$28,000										
23			TRM Service Bureau \$80,000 (FY 04 - FY 08)										
24	U-3475	MPO -UPWP sp projects	Various Planning Activities	\$2,307,168	\$0	\$0	\$58,000	\$50,000	\$577,483	\$488,251	\$672,000	\$461,434	MPO
25			MPO YDM	\$343,750	\$0				\$85,000	\$85,000	\$105,000	\$68,750	NCDOT
26			Bike/Ped (non-motorized trip) Model Development	\$75,000	\$0						\$60,000	\$15,000	MPO
27			GIS Integration and Automation	\$50,000	\$0						\$40,000	\$10,000	Multiple
28			Concession Management System	\$250,000	\$0					\$100,000	\$100,000	\$50,000	Multiple
29			CH - Chapel Hill Mobility Report Card	\$225,000	\$0		\$58,000		\$122,000			\$45,000	Chapel Hill
30			CAR - Carrboro Downtown Study	\$50,000	\$0				\$40,000			\$10,000	Carrboro
31			Old Durham-CH Rd. bike/ped feasibility study	\$62,500	\$0				\$50,000			\$12,500	Multiple
32			MPO Collector Street Plan	\$50,000	\$0				\$40,000			\$10,000	Multiple
33			Model travel behavior surveys (HH, B&A counts)	\$300,000	\$0				\$160,483	\$79,517		\$60,000	Multiple
34			Model enhancements and major update	\$225,000	\$0				\$30,000		\$150,000	\$45,000	Multiple
35			Model surveys Ph-2 (onboard, travel time, external)	\$243,750	\$0					\$67,000	\$128,000	\$48,750	Multiple
36			TDM additional request (TTA)	\$50,000	\$0				\$40,000			\$10,000	Multiple
37			MPO CMS	\$60,000	\$0				\$48,000			\$12,000	Multiple
38			CH/CAR - Chapel Hill/Carrboro Transit Master plan	\$200,000	\$0				\$160,000			\$40,000	Multiple
39			AQ Planning/Conformity (TJCOG)	\$42,168	\$0				\$8,734		\$25,000	\$8,434	Multiple
40			Chapel Hill YDM	\$50,000	\$0						\$40,000	\$10,000	Chapel Hill
41			STAC	\$30,000	\$0						\$24,000	\$6,000	Multiple
42			L RTP Revenue Projections	\$4,798	\$0						\$3,838	\$960	Multiple
		Durham Total		\$20,801,309	\$7,089,577	\$4,377,380	\$186,640	\$0	\$113,600	\$2,251,000	\$2,168,579	\$4,615,282	Durham
		Orange Total		\$17,884,128	\$0	\$1,418,000	\$197,124	\$197,124	\$2,215,356	\$3,510,664	\$1,190,000	\$3,618,498	Orange
		MPO-Wide Total		\$8,997,168	\$1,510,000	\$165,000	\$273,000	\$278,657	\$639,863	\$607,812	\$1,005,000	\$1,805,434	Other
		Yearly Total		\$14,217,737	\$4,542,360	\$1,877,640	\$475,781	\$2,968,819	\$6,369,478	\$4,363,579	\$3,415,394	\$24,919,414	Total
		STP DIRECT ATTRIBUTABLE			\$18,059,826	\$2,732,775	\$3,211,059	\$3,632,240	\$3,552,867	\$4,083,000	\$3,977,133	\$39,248,900	Total STPDA
		MPO Reserve		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
		FY BALANCE				(\$1,809,585)	\$1,333,419	\$3,156,459	\$584,048	(\$2,286,478)	(\$386,446)		
		Uncommitted Balance				\$3,377,643		\$6,057,936	\$6,641,984	\$4,355,506	\$3,969,060		

Obligated as shown in the table

DCHC MPO -- STP-DA Allocation Table (FY 2009-2015) proposal  
Annual Reserve Table

TIP #	Location	Description	Status	FY 09	FY 10	FY 11	FY 12	FY 13	FY 14	FY 15	Total Federal	Non-Fed Match	Agency	Total Project Funds
		TOTAL AVAILABLE		\$596,570	\$596,570	\$596,570	\$596,570	\$596,570	\$596,570	\$596,570	\$4,175,990			
		City of Durham/DATA												
	Durham	DATA Passenger Amenities	Proposed - New	\$86,274							\$86,274	\$21,569	Durham	\$107,843
	Durham	DATA Sidewalk	Proposed - New	\$15,840							\$15,840	\$3,960	Durham	\$19,800
	Durham	Barbee Rd. (Orindo to Pearsonstown Elem.) Sidewalk	Proposed - New	\$15,680							\$15,680	\$3,920	Durham	\$19,600
		Town of Chapel Hill/CHT												
	Chapel Hill	Transit Study: local trip generation rates	Proposed - New	\$40,000							\$40,000	\$10,000	Chapel Hill	\$50,000
	Chapel Hill	Greenways/bike ped maps	Proposed - New	\$24,000							\$24,000	\$6,000	Chapel Hill	\$30,000
		LPA Planning												
	MPO-wide	Additional Funding for ITS Deployment Plan	Approved 4/08 - Additional	\$16,000							\$16,000	\$4,000	Multiple	\$20,000
	MPO-wide	Commercial Vehicle Study	Approved 4/08 - New	\$100,000							\$100,000	\$25,000	Multiple	\$125,000
	MPO-wide	Parking Study	Approved 4/08 - New	\$100,000							\$100,000	\$25,000	Multiple	\$125,000
		Triangle Transit												
	Regional	1 Replacement Bus (50% share)	Proposed - New	\$136,000							\$136,000	\$34,000	TT	\$170,000
	Regional	4 12-passenger Vans (50% share)	Proposed - New	\$32,752							\$32,752	\$8,188	TT	\$40,940
	MPO-wide	100% of DCHC Area Passenger Amenities	Proposed - New	\$46,400							\$46,400	\$11,600	TT	\$58,000
		Yearly Total		\$596,570	\$0	\$0	\$0	\$0	\$0	\$0	\$596,570			
		FY BALANCE		(\$0)	\$596,570	\$596,570	\$596,570	\$596,570	\$596,570	\$596,570	\$3,579,420			
		Uncommitted Balance		(\$0)	\$596,570	\$1,193,140	\$1,789,710	\$2,386,280	\$2,982,850	\$3,579,420				

Subcommittee Recommendation

Two Year Window for Expenditure of Funds

Requests

TIP #	Location	Description	Status	FY 09	FY 10	FY 11	FY 12	FY 13	FY 14	FY 15	Total Federal	Non-Fed Match	Agency	Total Project Funds
		TOTAL AVAILABLE		\$596,570	\$596,570	\$596,570	\$596,570	\$596,570	\$596,570	\$596,570	\$4,175,990			
		City of Durham/DATA												
	Durham	DATA Passenger Amenities	Proposed - New	\$200,000							\$200,000	\$50,000	Durham	\$250,000
	Durham	DATA Sidewalk	Proposed - New	\$15,840							\$15,840	\$3,960	Durham	\$19,800
	Durham	New Bicycle Map	Proposed - New	\$8,000							\$8,000	\$2,000	Durham	\$10,000
	Durham	LaSalle St. Sidewalk	Proposed - New	\$76,000							\$76,000	\$19,000	Durham	\$95,000
	Durham	Barbee Rd. (Orindo to Pearsonstown Elem.) Sidewalk	Proposed - New	\$15,680							\$15,680	\$3,920	Durham	\$19,600
		Town of Chapel Hill/CHT												
	Chapel Hill	Transit Study: local trip generation rates	Proposed - New	\$40,000							\$40,000	\$10,000	Chapel Hill	\$50,000
	Chapel Hill	Ephesus Church Road Sidewalk	Proposed - New	\$130,000							\$130,000	\$32,500	Chapel Hill	\$162,500
	Chapel Hill	Greenways/bike ped maps	Proposed - New	\$24,000							\$24,000	\$6,000	Chapel Hill	\$30,000
		LPA Planning												
	MPO-wide	Additional Funding for ITS Deployment Plan	Approved - Additional \$	\$16,000							\$16,000	\$4,000	Multiple	\$20,000
	MPO-wide	Commercial Vehicle Study	Approved - New	\$100,000							\$100,000	\$25,000	Multiple	\$125,000
	MPO-wide	Parking Study	Approved - New	\$100,000							\$100,000	\$25,000	Multiple	\$125,000
		Triangle Transit												
	Regional	1 Replacement Bus (50% share)	Proposed - New	\$136,000							\$136,000	\$34,000	TT	\$170,000
	Regional	4 12-passenger Vans (50% share)	Proposed - New	\$32,752							\$32,752	\$8,188	TT	\$40,940
	Regional	2 7-passenger Vans (50% share)	Proposed - New	\$12,600							\$12,600	\$3,150	TT	\$15,750
	MPO-wide	100% of DCHC Area Passenger Amenities	Proposed - New	\$46,400							\$46,400	\$11,600	TT	\$58,000
		Yearly Total		\$953,272	\$0	\$0	\$0	\$0	\$0	\$0	\$953,272			
		FY BALANCE		(\$356,702)	\$596,570	\$596,570	\$596,570	\$596,570	\$596,570	\$596,570	\$3,222,718			
		Uncommitted Balance		(\$356,702)	\$239,868	\$836,438	\$1,433,008	\$2,029,578	\$2,626,148	\$3,222,718				

DCHC MPO -- STP-DA Allocation Table (FY 2009-2015) proposal  
Staff and Routine Planning Table

TIP #	Location	Description	Status	Prior Years	FY 09	FY 10	FY 11	FY 12	FY 13	FY 14	FY 15	Total Federal	Non-Fed Match	Agency	Total Project Funds
		TOTAL AVAILABLE			\$548,625	\$644,956	\$664,173	\$683,964	\$704,344	\$725,333	\$746,948				
U-4727	MPO -UPWP	MPO Planning		\$3,040,000	\$523,000	\$618,690	\$637,251	\$656,368	\$676,059	\$696,341	\$717,231	\$7,564,941	\$1,891,235	Multiple	\$9,456,176
		UPWP Planning \$165,000 in FY 09	Approved - On-going												
		MPO Bike Ped Planner Position \$36,000 in FY 09	Approved - On-going												
		TRM Service Bureau \$120,000 in FY 09	Approved - On-going												
		Grant & MPO Admin \$55,000 beginning in FY09	Approved 4/08 - New												
		GIS/Website Specialist \$75,000 beginning in FY09	Approved 4/08 - New												
		Transportation Engineer/Planner \$72,000 beginning in FY09	Approved 4/08 - New												
		Transportation Technician/Specialist \$40,000 beginning in FY10	Approved 4/08 - New												
		Transportation Technician/Specialist \$40,000 beginning in FY10	Approved 4/08 - New												
U-3475	MPO-wide	AQ Planning/Conformity (TJCOG)	Approved - On-going	\$33,734	\$25,625	\$26,266	\$26,922	\$27,595	\$28,285	\$28,992	\$29,717	\$227,137	\$56,784	Multiple	\$283,921
		TOTAL		\$3,073,734	\$548,625	\$644,956	\$664,173	\$683,964	\$704,344	\$725,333	\$746,948	\$7,792,077	\$1,948,019		\$9,740,097

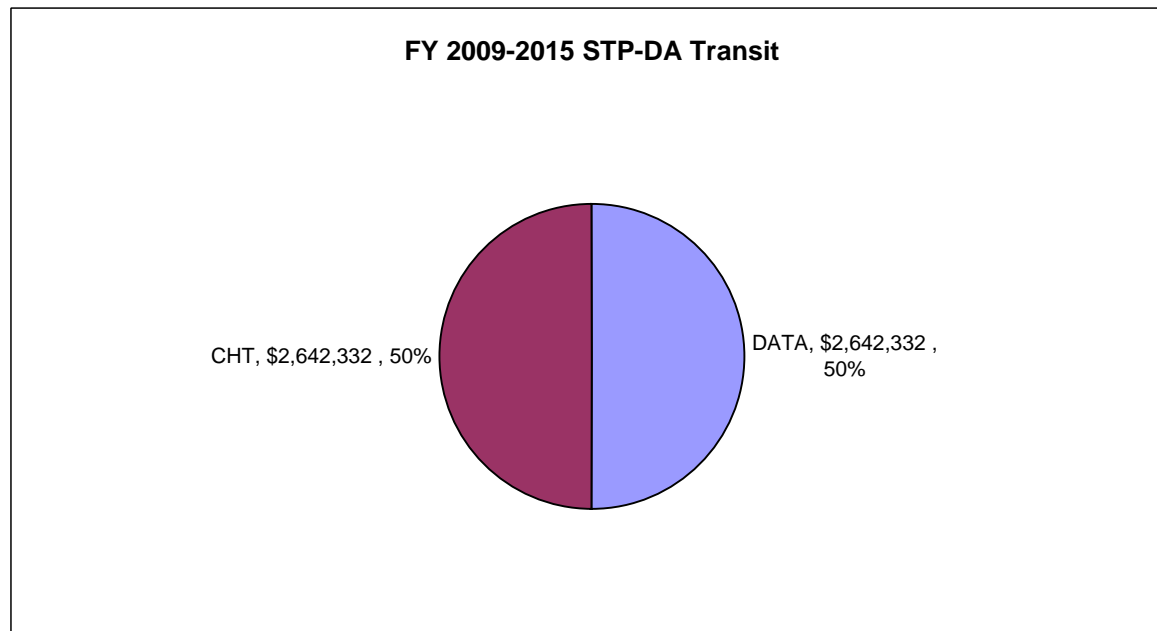
DCHC MPO -- STP-DA Allocation Table (FY 2009-2015) proposal  
 Extra Planning Activities Table

TIP #	Location	Description	Status	Prior Years	FY 09	FY 10	FY 11	FY 12	FY 13	FY 14	FY 15	Total Federal	Non-Fed Match	Agency	Total Project Funds
		<u>TOTAL AVAILABLE</u>			\$1,476,000	\$300,000	\$0	\$0	\$0	\$0	\$0	\$1,776,000			
U-3475	MPO-wide	Model Enhancements and major update	Approved - On-going	\$180,000	\$80,000							\$260,000	\$65,000	Multiple	\$325,000
U-3475	MPO-wide	ITS Deployment Plan Update	Approved - Postponed to FY 09	\$0	\$56,000							\$56,000	\$14,000	Multiple	\$70,000
U-3475	MPO-wide	Bike/Ped (non-motorized trip) Model Development	Approved - On-going	\$60,000	\$140,000							\$200,000	\$50,000	Multiple	\$250,000
U-3475	MPO-wide	GIS Integration and Automation	Approved - On-going	\$40,000	\$160,000							\$200,000	\$50,000	Multiple	\$250,000
U-3475	MPO-wide	Land Use Model Development	Approved - Postponed to FY 09	\$0	\$200,000							\$200,000	\$50,000	Multiple	\$250,000
U-3475	MPO-wide	MPO Collector Street Plan	Approved - On-going	\$40,000	\$40,000							\$80,000	\$20,000	Multiple	\$100,000
U-3475	MPO-wide	Transit Studies	Approved	\$0	\$600,000							\$600,000	\$150,000	Multiple	\$750,000
U-3475	MPO-wide	GIS Integration Phase II	Approved - Additional \$	\$0	\$300,000							\$300,000	\$75,000	Multiple	\$375,000
U-3475	MPO-wide	NC 54 Subarea Study	Approved	\$0	\$200,000							\$200,000	\$50,000	Multiple	\$250,000
		<b>TOTAL</b>		\$320,000	\$1,476,000	\$300,000	\$0	\$0	\$0	\$0	\$0	\$2,096,000	\$524,000		\$2,620,000

DCHC MPO -- STP-DA Allocation Table (FY 2009-2015) proposal  
Transit Table

TIP #	Location	Description	Status	FY 09	FY 10	FY 11	FY 12	FY 13	FY 14	FY 15	Total Federal	Non-Fed Match	Agency	Total Project Funds
		<b>TOTAL AVAILABLE</b>		\$480,737	\$750,654	\$820,850	\$815,902	\$810,807	\$805,560	\$800,156	\$5,284,664			
		DATA									\$2,642,332			
	Durham	6 Hybrid Expansion Buses	Proposed - New	\$2,642,332							\$2,642,332	\$660,583	Durham	\$3,302,915
		DATA Uncommitted Balance									\$0			
		CHT									\$2,642,332			
	Chapel Hi	Miscellaneous Capital/Buses	Proposed - New	\$400,000							\$400,000	\$100,000	Chapel Hill	\$500,000
	Chapel Hi	Purchase 5 Buses	Proposed - New		\$1,650,000						\$1,650,000	\$412,500	Chapel Hill	\$2,062,500
	Chapel Hi	Miscellaneous Capital/Buses	Proposed - New		\$592,332						\$592,332	\$148,083	Chapel Hill	\$740,415
		CHT Uncommitted Balance									\$0			
		Yearly Total		\$3,042,332	\$2,242,332	\$0	\$0	\$0	\$0	\$0	\$5,284,664			
		FY BALANCE		(\$2,561,595)	(\$1,491,678)	\$820,850	\$815,902	\$810,807	\$805,560	\$800,156	\$0			
		Uncommitted Balance		(\$2,561,595)	(\$4,053,273)	(\$3,232,424)	(\$2,416,522)	(\$1,605,715)	(\$800,155)	\$0				

Subcommittee Recommendation



DCHC MPO -- STP-DA Allocation Table (FY 2009-2015) proposal  
Regional Bicycle & Pedestrian Table

TIP #	Location	Description	Status	FY 09	FY 10	FY 11	FY 12	FY 13	FY 14	FY 15	Total Federal	Non-Fed Match	Agency	Total Project Funds
		<u>TOTAL AVAILABLE</u>		\$480,737	\$750,654	\$820,850	\$815,902	\$810,807	\$805,560	\$800,156	\$5,284,664			
E-4707	Old Durham-CH Rd.	Bike Lanes	Approved - In Design	\$1,371,000	\$1,371,000						\$2,742,000	\$685,500	Multiple	\$3,427,500
EL-2921	American Tobacco Tr.	Phase E	Approved - In Design	\$590,500	\$590,500						\$1,181,000	\$295,250	Durham	\$1,476,250
		Yearly Total		\$1,961,500	\$1,961,500	\$0	\$0	\$0	\$0	\$0	\$3,923,000			
		FY BALANCE		(\$1,480,763)	(\$1,210,846)	\$820,850	\$815,902	\$810,807	\$805,560	\$800,156	\$1,361,664			
		Uncommitted Balance		(\$1,480,763)	(\$2,691,609)	(\$1,870,760)	(\$1,054,858)	(\$244,051)	\$561,509	\$1,361,664	\$1,361,664			

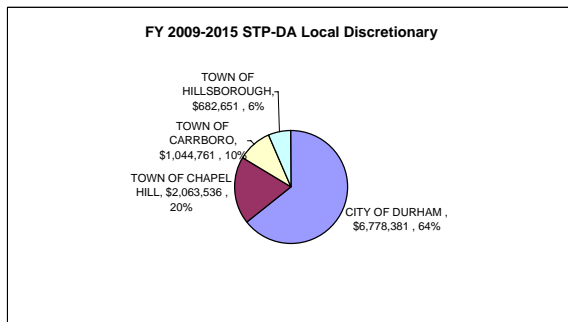
Chapel Hill proposed this project for consideration. The TCC subcommittee recommends considering this at the same time as other potential regional bicycle and pedestrian projects.

	Morgan Creek	Greenway	Proposed - New	\$750,000							\$750,000	\$187,500	Multiple	\$937,500
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DCHC MPO -- STP-DA Allocation Table (FY 2009-2015) proposal  
Local Discretionary Table

TIP #	Location	Description	Status	FY 09	FY 10	FY 11	FY 12	FY 13	FY 14	FY 15	Total Federal	Non-Fed Match	Other Funding	Total Project Funds
		<b>TOTAL AVAILABLE</b>		\$961,473	\$1,501,308	\$1,641,699	\$1,631,804	\$1,621,614	\$1,611,119	\$1,600,312	\$10,569,329			
		<b>CITY OF DURHAM</b>									\$6,778,381			
J-4724	Cornwallis Rd.	Bike/Ped Facilities (S. Roxboro to University or C.H. Rd.)	Approved - No activity		\$1,816,000						\$1,816,000	\$454,000		\$2,270,000
J-4445	NC 147	Bike-Ped Bridge	Proposed - Additional \$	\$800,000							\$800,000	\$200,000	\$2,000,000	\$3,000,000
C-4928	Morreene Rd.	Bike/Ped Facilities (Neal to Erwin)	Proposed - Additional \$		\$1,248,000						\$1,248,000	\$312,000	\$556,000	\$2,116,000
	Avondale Dr.	Sidewalk (Roxboro to Geer)	Proposed - New			\$412,000					\$412,000	\$103,000		\$515,000
J-4726K	Hillandale Rd.	Bike/Ped Facilities (I-85 to Fulton)	Proposed - Additional \$			\$920,000					\$920,000	\$230,000	\$165,484	\$1,315,484
	Cheek Rd.	Bike/Ped Facilities (Geer to Hardee)	Proposed - New			\$556,000					\$556,000	\$139,000		\$695,000
J-4726O	Carpenter-Fletcher	Bike/Ped Facilities (Woodcroft to Alston)	Proposed - Additional \$		\$1,026,381						\$1,026,381	\$256,595	\$142,740	\$1,425,716
		<i>City of Durham Uncommitted Balance</i>									(\$0)			
		<b>TOWN OF CHAPEL HILL</b>									\$2,063,536			
J-5022	Chapel Hill	Upper Booker Creek Greenway	Proposed deletion			\$0					\$0	\$0		\$0
		Old Mason Farm	Pedestrian safety improvements		\$120,000						\$120,000	\$30,000		\$150,000
	NC86/other loc.	Pedestrian safety improvements	Proposed-additional	\$150,000	\$150,000						\$300,000	\$75,000		\$375,000
	Franklin St	Pedestrian access to Bolin Creek Trail	Proposed-new		\$120,000						\$120,000	\$30,000		\$150,000
	Bolin Creek	Greenway construction	Proposed-new		\$750,000						\$750,000	\$187,500		\$937,500
	NC86/US 15-501	BRT improvements	Proposed-new		\$250,000	\$250,000					\$500,000	\$125,000		\$625,000
	Ephesus Church	Ephesus Church Road Sidewalk	Proposed-new		\$72,232						\$72,232	\$18,058		\$90,290
	Systemwide	Transit marketing/Short Range Planning	Proposed-new	\$200,000							\$200,000	\$50,000		\$250,000
		<i>Town of Chapel Hill Uncommitted Balance</i>									\$1,304			
		<b>TOWN OF CARRBORO</b>									\$1,044,761			
	Carrboro	Use Path from Wilson Park to Estes Dr.	Proposed - New		\$168,684						\$168,684	\$42,171		\$210,855
	Rogers Rd.	Use Path (Homestead to Meadow Run)	Proposed - New		\$428,960						\$428,960	\$107,240		\$536,200
	Carrboro	BPW-Westbrook Multi-use Path Feasibility Study	Proposed - New	\$4,000							\$4,000	\$1,000		\$5,000
	Carrboro	Bicycle Loop Detectors	Proposed - New		\$30,000						\$30,000	\$7,500		\$37,500
	Carrboro	Bolin Creek Greenway	Proposed - New		\$214,700						\$214,700	\$53,675		\$268,375
	S. Greensboro St.	Sidewalk	Proposed - New			\$46,640					\$46,640	\$11,660		\$58,300
	Carrboro	Bel Arbor-Plantation Acres Multi-use Path	Proposed - New					\$67,000			\$67,000	\$16,750		\$83,750
		<i>Town of Carrboro Uncommitted Balance</i>									\$84,777			
		<b>TOWN OF HILLSBOROUGH</b>									\$682,651			
	Nash St.	Sidewalk	Proposed - New	\$543,385							\$543,385	\$135,847		\$679,233
		<i>Town of Hillsborough Uncommitted Balance</i>									\$139,265			
		<b>Yearly Total</b>		\$1,817,386	\$6,030,257	\$2,382,700	\$46,640	\$67,000	\$0	\$0	\$10,343,983			
		<b>FY BALANCE</b>		(\$855,913)	(\$4,528,949)	(\$741,001)	\$1,585,164	\$1,554,614	\$1,611,119	\$1,600,312	\$225,346			
		<b>Uncommitted Balance</b>		(\$855,913)	(\$5,384,862)	(\$6,125,862)	(\$4,540,698)	(\$2,986,085)	(\$1,374,966)					

Subcommittee Recommendation



## MEMORANDUM

**TO:** Technical Coordinating Committee (TCC)  
DCHC MPO

**FROM:** Lead Planning Agency

**DATE:** April 23, 2008

**RE:** Job Access Reverse Commute and New Freedom Call for Projects

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The available funds are from two sources – Job Access/Reverse Commute (JARC) and New Freedom (NF). JARC funds are intended to fund “the development and maintenance of transportation services designed to transport welfare recipients and eligible low-income individuals to and from jobs and activities related to their employment”. NF funds are intended to provide improved public transportation services and alternatives to public transportation for people with disabilities beyond those required by the Americans with Disabilities Act of 1990 (ADA). Eligible applicants for both programs include state or local governments, private non-profit organizations, and operators of public transportation services including private operators of public transportation services. Funds may be used for planning, capital, or operating costs. Funds can be used to support up to 80 percent for capital projects, and not more than 50 percent for operating assistance. Up to 10 percent of annual funds are permitted to be spent on administration of the program.

As required by the FTA, the DCHC MPO created a Coordinated Public Transportation - Human Services Transportation Plan to guide the selection and funding of future JARC and NF projects. The TAC approved this plan in March 2007. Subsequently, the DCHC MPO solicited proposals for the remaining FY 2006 funds and the FY 2007 funds from transportation providers. Three applications were awarded JARC or NF funds in June 2007. The DCHC MPO did not allocate all of the FY 2006 and FY 2007 funds. The remainder is available for allocation during this year’s Call for Projects.

### **Schedule**

This is schedule for the Call for Projects:

- 12/12/07 TAC reviews application process and requests that staff solicit for applications
- 12/13/07 - 2/27/08 Solicitation for applications
- 1/16/08 Work session for applicants
- 2/28/08 Application deadline
- 3/1/08 – 3/25/08 Review committee scores the applications

- 4/3/08 Review committee meets to select projects for recommendation to the TCC
- 4/23/2008 TCC action on review committee recommendations
- 5/14/2008 TAC action on TCC recommendations
- 6/2008 Funding recipients receive notification

### **Subcommittee Recommendation**

The DCHC MPO has FY 2006, 2007, and 2008 funding available for New Freedom and FY 2007 and 2008 funding available for JARC. Since the funds lapse after three years, the DCHC MPO must obligate the FY 2006 NF funds by June 30, 2008 or lose them. The tables on the following pages display the funding available, the funding requested, and the subcommittee recommendation. The scoring criteria are also included on the last page of this attachment.

For New Freedom, the subcommittee recommends funding the administration and the Chapel Hill Transit/Orange Public Transit project. The subcommittee does not recommend funding the 2U Transit project because it does not meet the screening criteria. The project is not offering a non-duplicative or expanded service. DATA has not agreed to the partnership and it is not clear that the matching funds are coming from a source other than fares.

For JARC, the subcommittee recommends funding the administration, the Chapel Hill Transit project, and the DATA New Hope Commons project. The subcommittee did not recommend the DATA Silver Line Windows project as originally submitted due to concerns regarding the headways and quality of service. However, the subcommittee saw merit in the service concept and recommended that DATA submit a revised application for consideration by the TCC.

### **TCC Action:**

Recommend that the TAC approve funding projects using New Freedom and Job Access Reverse Commute funds.

**New Freedom**

	<b>FY 2006</b>	\$ 71,878
	<b>FY 2007</b>	\$ 71,810
<b>Appropriations</b>	<b>FY 2008</b>	\$ 77,573
	<b>Total</b>	\$ 221,261

<b>Programmed</b>	<b>Total</b>	\$ 30,433
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<b>Remaining</b>		\$ 190,828
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<b>Applicant</b>	<b>Title</b>	<b>Description</b>	<b>Project Type</b>	<b>Total Cost</b>	<b>Requested Funds</b>	<b>%</b>	<b>TCC Subcommittee Recommendation</b>	
City of Durham	Administration of the NF Program for FY 2008		Planning	\$ 6,206	\$ 6,206	100%	Fully fund	\$ 6,206
CHT and OPT	New Coordinated Service to the Elderly and Handicapped	Financial support to provide feeder service to the elderly population	Operating Only, Mobility Management/ Coordinated Planning	\$ 97,600	\$ 48,800	50%	Fund, but request that CHT and OPT revise their application.	\$ 48,800
2U Transit and DATA	Partnership between 2U Transit and DATA	This project will supplement the services currently provided by DATA and/or replace routes that are no longer cost efficient for them to operate. Durham Tech, DECI, and LCC are the routes in which economies of scale may be achieved.	Mobility Management/ Coordinated Planning	\$ 119,592	\$ 59,796	50%	Do not fund. The application does not meet the screening criteria. It does not offer a non-duplicative service or expanded service. DATA has not agreed to the partnership. It is not clear where the matching funds are coming from.	\$ -
			<b>Requested</b>	<b>Total</b>	<b>\$ 114,802</b>		<b>Recommended Total</b>	<b>\$ 55,006</b>
				<b>Difference</b>	<b>\$ 76,026</b>		<b>Difference</b>	<b>\$ 135,822</b>

**Job Access Reverse Commute**

	<b>FY 2006</b>	\$ 152,453
	<b>FY 2007</b>	\$ 160,702
<b>Appropriations</b>	<b>FY 2008</b>	\$ 174,094
	<b>Total</b>	\$ 487,249

<b>Programmed</b>	<b>Total</b>	\$ 275,526
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<b>Remaining</b>	<b>Total</b>	\$ 211,723
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Applicant	Title	Description	Project Type	Total Cost	Requested Funds	%	TCC Subcommittee Recommendation	
City of Durham	Administration of the JARC Program for FY 2008		Planning	\$ 13,928	\$ 13,928	100%	Fully Fund	\$ 13,928
CHT	HS Route Expansion/Rogers Road	Financial support to expand the HS route to introduce new service to the Rogers Road community and midday service throughout the route. Service would provide transit to a low income neighborhood currently not served and improve access to transit along the current HS route	Operating Only	\$ 169,936	\$ 84,968	50%	Fund, but request that CHT revise the application.	\$ 84,968
DATA	Weeknights, Sunday, and Holiday Service to New Hope Commons	Funding to operate expanded route 10 evening services. The hours of service would be extended to 12 am. The proposed extended hours of service will meet the needs for passengers, employees and employers at New Hope Commons	Operating Only	\$ 145,986	\$ 72,993	50%	Fund, but request that DATA revise the application	\$ 72,993
DATA	Route 15 Service Hours Extension	Funding to operate and publicize expanded route 15 service. The hours of service would be extended to 12 am. The proposed extended hours of service will meet the needs of employers at Brier Creek as well as Silver Line Windows.	Operating Only	\$ 194,392	\$ 97,196	50%	Do not fund as presented in the application. The subcommittee offered several suggestions to DATA to improve the proposal. DATA can submit a revised application to the TCC in April.	
				<b>Requested Total</b>	<b>\$ 269,085</b>		<b>Recommended Total</b>	<b>\$ 171,889</b>

<b>Difference</b>	<b>\$ (57,362)</b>
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<b>Difference</b>	<b>\$ 39,834</b>
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## SCORING CRITERIA

The following information and scoring criteria will be used to score and rate project applications for JARC and New Freedom (NF) funding.

- a. *Project Needs/Goals and Objectives (30 points)*: The project should directly address priority transportation needs identified through the Durham-Chapel Hill-Carrboro MPO's locally developed Coordinated Public Transportation - Human Services Transportation Plan available at [www.dchcmpo.org](http://www.dchcmpo.org) or call 919 560-4366. Project application should clearly state the overall program goals and objectives, and demonstrate how the project is consistent with the objectives of the JARC and NF grant programs. The project application should indicate the number of persons expected to be served, and the number of trips (or other units of service) expected to be provided.
- b. *Implementation Plan and Evaluation (20 points)*: For all projects, applicants must provide a well-defined service operations plan and/or capital procurement plan, and describe implementation steps and timelines for carrying out the plan. The implementation plan should identify key personnel assigned to this project and their qualifications. Project sponsors should demonstrate their institutional capability to carry out the service delivery aspect of the project as described.
- c. *Project Budget (15 points)*: Applicants must submit a clearly defined project budget, indicating anticipated project expenditures and revenues, including documentation of matching funds. Proposals should address long-term efforts and identify potential funding sources for sustaining the service beyond the grant period.
- d. *Partnerships and Program Outreach (20 points)*: Proposed projects will be evaluated based on their ability to coordinate with other public transportation, community transportation and/or social service resources. Project sponsors should clearly identify project stakeholders, and how they will keep stakeholders involved and informed throughout the project. Project sponsors should also describe how they would promote public awareness of the project. Letters of support from key stakeholders and/or customers should be attached to the grant application.
- e. *Program Effectiveness and Performance Indicators (10 points)*: The project will be scored based on the project sponsor's ability to demonstrate that the proposed project is the most appropriate match of service delivery to the need, and is a cost-effective approach. Project sponsors must also identify clear, measurable outcome-based performance measures to track the effectiveness of the service in meeting the identified goals. A plan should be provided for ongoing monitoring and evaluation of the service, and steps to be taken if original goals are not achieved. Sponsor should describe their steps to measure the effectiveness and magnitude of the impact that the project will have on target markets (i.e., persons with low-income for the JARC funds, or persons with disabilities or the elderly for the New Freedom funds).
- f. *Innovation (5 points)*: The project will be examined to see if it contains new or innovative service concepts or facilities that have the potential for improving access and mobility for the target populations and may have future application elsewhere in the region.

**Project Requirements**

The Selection Committee must find that the answer to each of the five following questions is affirmative for a project to be considered eligible for grant funding.

**Project Evaluation Score sheet**

Is the proposed project a non-duplicative service or program?	
Are eligible matching funds identified and available?	
Is the proposed project a new or expanded service or program?	
Is the primary focus of the proposed service or program serving target populations (i.e., persons with low-income for the JARC funds, or persons with disabilities or elders for the New Freedom funds)?	
Does the project provide benefits to the Durham – Chapel Hill – Carrboro urbanized area (see enclosed map)?	

Each proposal will receive a score from the Project Selection Committee according to following criteria.

<b>Project Evaluation Criteria</b>	<b>Possible Points</b>	<b>Project Score</b>
<b>Project Need/Goals &amp; Objectives</b>		
How well does this project address high-priority needs identified in the Coordinated Plan?	20	
How effectively will this project increase the numbers of target market customers served?	10	
<b>Implementation Plan</b>		
What is the quality of the implementation plan?	20	
<b>Project Budget</b>		
How efficiently will the projects provide benefits to the customers (e.g., cost per customer served)	10	
How financially sustainable is the program/service beyond the grant period?	5	
<b>Partnerships and Outreach</b>		
How effectively are partnerships used in provision of the program/service?	5	
How strong is the demonstration of stakeholder support (e.g., survey data, letters from end users)?	5	
What is the quality of marketing/outreach plan?	5	
How widely will the benefits of this project be felt? (more points for region-wide benefits)	5	
<b>Program Effectiveness and Performance Indicators</b>		
What is the quality of the evaluation plan (including customer satisfaction, cost per unit of service, and customers per unit of service)?	10	
<b>Innovation</b>		
Does the project contain innovative ideas that could be applied elsewhere in the region?	5	

JOB ACCESS/REVERSE COMMUTE (JARC)  
AND NEW FREEDOM PROGRAMS  
**APPLICATION FOR FUNDING**

**PART I - TRANSMITTAL**

**Applicant Data**

Legal Name: Town of Chapel Hill, Chapel Hill Transit, Orange County Public Transit

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Contact Person: Steve Spade, Transit Director, Al Terry, Mgr Orange County Public Transit

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Address: 6900 Millhouse Road

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City, State, Zip: Chapel Hill, NC 28516

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Telephone: 919-969-4909 Steve Spade

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Fax: 919-968-2840 Chapel Hill Transit or 919-969-4909

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E-mail: [sspade@townofchapelhill.org](mailto:sspade@townofchapelhill.org) ; aterry@county.orange.nc.us

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**Project Description**

TITLE New Coordinated Service to the Elderly and Handicapped

BRIEF DESCRIPTION Chapel Hill Transit and Orange County Public Transit request financial support to provide feeder service to the elderly population in the Chapel Hill/Carrboro area.

FUNDING PROGRAM: JARC \_\_\_\_\_ New Freedom X

PROJECT TYPE Capital Only \_\_\_\_\_ \_\_\_\_\_Capital and Operating

Operating Only X XMobility Management/Coordinated Planning

SERVICE DAYS/HOURS Service would operate 9 hours daily/255 days/year

ESTIMATED COST PER ONE WAY TRIP \$4.78 (boarded passenger)

ESTIMATED DAILY RIDERS 80 weekday (weekday/weekend)

## **Part II Narrative**

### **Project Need/Goals & Objectives**

Chapel Hill and Orange County Public Transit provide transportation services for the elderly and disabled population throughout Orange County. Orange County Public Transit provides service in the non urban areas of Orange County while Chapel Hill Transit services focus on the urban area. Orange County has social service clients that utilize service provided by Orange County Public Transit and Chapel Hill Transit EZ Rider operation.

EZ Rider provides demand response service to elderly and handicapped persons residing within Chapel Hill, Carrboro and UNC. Combined, the two systems provide approximately 350 daily rides.

With the recent construction of the Seymour Center on Homestead Road in Chapel Hill, a long term problem has become more evident. Many of the senior citizens that reside in Chapel Hill have difficulty using fixed route services to access services such as the Seymour Center throughout the community. While not fully needing the demand response service provided by EZ Rider, these persons still encounter difficulty using the fixed route system because of the length of travel and the need to transfer. The more frail population is comfortable making a more direct trip. The need for a more direct service has been a regular request at public forums.

As a result, many of these persons find themselves utilizing the EZ Rider service resulting in overcrowded schedules and rising costs. Also, seniors who are using EZ Rider find access more difficult than the fixed route system. Finally, the cost to use the EZ Rider system is a significantly higher cost per trip than the \$1.22 cost to the Town of Chapel Hill for providing a fixed route trip.

Working with the Department of the Aging in Orange County and various public forums, the public demand has been strong for a bus route developed specifically to serve senior citizens needs traveling to areas of their primary destinations.

### **Project Description**

Chapel Hill Transit and Orange County Public Transit propose to develop and operate a feeder route system to connect areas of senior citizen concentrations with high demand locations.

This project requests funding to provide additional planning, production of marketing public information tools and the operation of a special senior citizen shuttle to be operated throughout the Chapel Hill-Carrboro area.

Attached as exhibits 1-7 are maps that show the distribution of elderly persons throughout Carrboro and Chapel Hill. In addition, exhibit 1 shows the high frequency boarding and alighting locations.

Under this program, Chapel Hill Transit and Orange County Public Transit would initiate the following activities collaboratively:

1. Analyze senior citizen residences and major boarding locations and traffic generators
2. Develop and plan a senior citizen route in the community
3. Develop marketing materials and use mobility management training to present options to customers. Mobility management training would be conducted by existing Chapel Hill Transit customer service staff.
4. Operate senior citizen shuttle service

Because the service is being designed to primarily target the elderly population, this project does qualify as meeting a target area of the CPT-HSTP in the following ways:

1. This will constitute a transportation outreach to the elderly community.
2. It will target services to the elderly community.
3. There will be a mobility manager portion to this program that will help people understand their options. Mobility management activities will be conducted by existing staff to support this project.

### Project Goals and Objectives

Project Goal: To develop and implement an improved transportation service to provide better mobility to elderly citizens of Carrboro and Chapel Hill.

Objectives:

- Provide an alternative to fixed route transportation for able bodied elderly persons that travel
- To make better use of community resources by providing lower cost trips on a senior shuttle than demand response service
- To effectively use community resources by collaboratively scheduling service between Orange County Public Transit and EZ Rider
- To respond to the community need for transportation alternatives
- Reduce reliance on the single occupancy vehicle

### Community Benefit

The introduction of this service will benefit the community in a number of ways.

1. The analysis of elderly travel needs will provide long term benefits for other transportation planning

2. The introduction of this service will improve services for the elderly and low income elderly population in Chapel Hill and Carrboro
3. Regional benefits will be derived by reduced auto emissions
4. Regional benefit from collaborative service planning by making better use of taxpayer resources

### Projected Ridership

The project budget projects that the equivalent of eight hours of revenue service will be provided daily by the initial operation of the senior shuttle. Traditionally, paratransit operations generate approximately three to three and a half passengers per hour. Because these services will be operating from high demand locations providing limited fixed route service, it is anticipated that the service would carry approximately ten passengers per hour or an estimated eighty passengers per day. In the current fixed route system the most inefficient fixed routes carry 13 passengers per hour. Because this is a new service providing service to a target population, it assumes that route performance will be comparable to lower performing fixed routes. On an annual basis this would mean that the service would provide approximately 20,400 rides.

### Implementation Plan

Chapel Hill and Orange County Public Transit would have the primary responsibility for the design, implementation and operation of the services. The project coordinator from Orange County Public Transit would be Al Terry, Manager of Orange County Public Transit. Steve Spade, Director of Chapel Hill Transit would be the project coordinator for Chapel Hill Transit. Mr. Terry and Mr. Spade would also work collaboratively with Mr. Jerry Passmore, Director of Orange County Department on Aging and Transportation.

It is anticipated that the following schedule will be followed for the development and implementation of services:

- Spring/Summer 2008 – hold public forums and service planning
- June/July – develop route structure and operating procedures
- July/August – develop and provide marketing and schedule information for potential users
- September 1 – begin operation of the senior citizen shuttle

### Project Budget (additional detail see Part III Project Budget)

It is anticipated that the service will provide eight revenue hours of service a day, total platform hours of nine hours per day. Cost factors are shown below.

9 hours daily revenue service x \$21.00/hour =	\$189.00
(hourly labor + benefits costs and \$.65/hour administrative cost	

135 daily revenue miles x \$1.00/mile (maintenance consumable cost) = \$135.00  
 (estimated operating miles is based on the current system average speed of 15  
 miles per hour projected for a 9 hour day.)

Total \$324.00

It is estimated that the annual cost to provide this service for a twelve month period,  
 Monday through Friday service is \$82,600.00

Attached as exhibit 8 is a sample route.

Planning activities including public forums, analysis of data, concept development-  
 \$ 7500.00

Development of marketing materials and outreach \$7500.00

Total project cost \$97, 600.00

Total annual projected ridership is 20,400 rides per year.

Recommended Fare: Free

Estimated cost per boarded passenger is \$4.78 per ride.

**Program Effectiveness and Performance Indicators**

The effectiveness of this program will be measured and evaluated by utilizing several  
 performance indicators including:

- Total Ridership
- Passengers per hour
- Cost per passenger

Service quality will be monitored by utilizing customer satisfaction surveys and  
 monitoring of on time performance.

The performance of this service will be monitored monthly and information will be  
 provided comparing the performance of the route to the expected standards of \$4.78 cost  
 per ride and the following goals:

- Total Ridership – 80 passengers per day
- Cost per boarder passenger - \$4.78
- Passengers per hour – 10

## **Coordination and Program Outreach**

The design of this service will be coordinated by Orange County Public Transit and Chapel Hill Transit. The coordination will include analysis of trips in Chapel Hill with Orange County Public Transit and Chapel Hill Transit. Vehicles will be assigned to make trips based on their scheduled availability and there will also be coordination on the scheduling aspects of the service. It is assumed that services will be operated by Chapel Hill Transit. However, Chapel Hill Transit and Orange Public Transit have agreed that as routes and schedules are developed, if Orange Public Transit vehicles can be provided more efficiently, they can be utilized. Routing and scheduling will be done collaboratively and therefore the transit agencies will be able to identify the most cost effective means to assign vehicles to any trips.

Service development will also be coordinated with the Orange County Department of Aging and Transportation, specifically to identify target markets and to coordinate schedules with activities at traffic generators such as the Seymour Center.

Chapel Hill Transit and Orange County will also work with other agencies that serve the elderly, such as elderly housing complexes like Carol Woods and other high demand destinations.

## **Innovations**

There are several innovative aspects to this service being provided.

1. Cooperation – two independent transit providers will work collaboratively to plan and operate services. Operations including scheduling and vehicle assignment will be done collaboratively.
2. Limited fixed route service provided by small vehicles –will provide a more cost effective service than door to door paratransit services, but provide more flexibility and direct travel than normal fixed route services
3. Travel training will be utilized as part of the mobility manager concept in which targeted markets are identified – Orange County Public Transit and Chapel Hill Transit will provide programs on how to access and utilize the service.
4. Coordinated scheduling – by utilizing both Orange Public Transit and Chapel Hill Transit EZ Rider vehicles, the trips will be assigned and scheduled to the most cost effective service provider, thus providing coordinated scheduling and more effective use of community resources.

**PART III - PROJECT BUDGET**

**Project Funding**

Local matching funds will be required for all application submittals. For projects requiring operating funds, the required match is 50%+ from non-federal transportation funds. For capital projects the required match is 20%+ from non-federal transportation funds.

Please include a certified financial statement from an accountant or bank.

Total Annual Project Budget \$97,600 (operating and capital only)

Capital Federal Share	\$0	_____%
Capital Local Match	\$0	_____%
Operating Federal Share	\$48,800	50%
Operating Local Match	\$48,800	50% Total

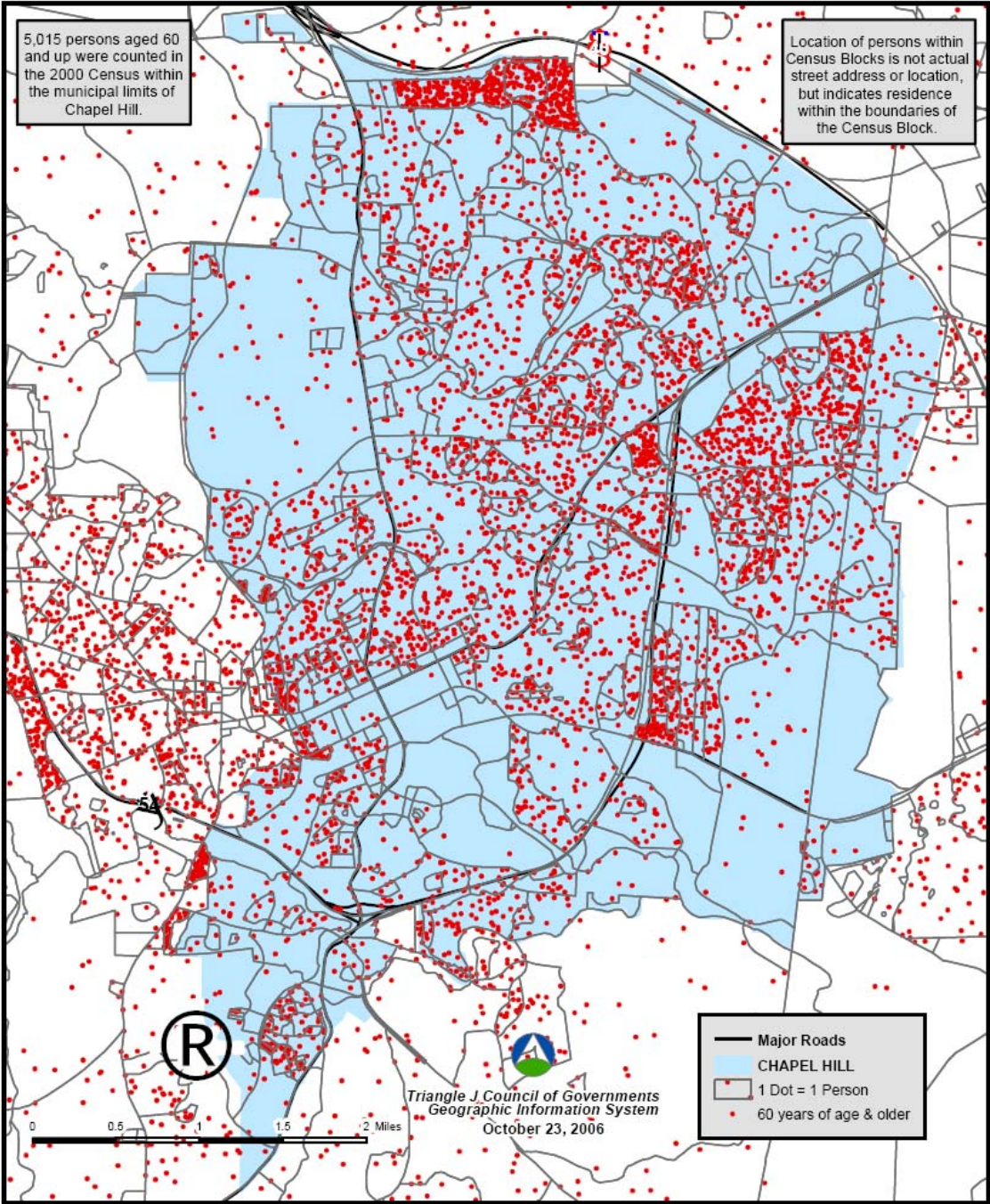
Local Match Funding Source: Funding will be included in the Chapel Hill Transit FY 2008/09 operating budget.

Note: The applicant is required to demonstrate a commitment to providing local match funds. This can be in the form of a letter and/or a copy of an existing grant agreement or supporting documentation where funds will be drawn from. Financial information must be certified by an accountant or financial institution.

Will there be a commitment of funds beyond the grant period?  Yes     No

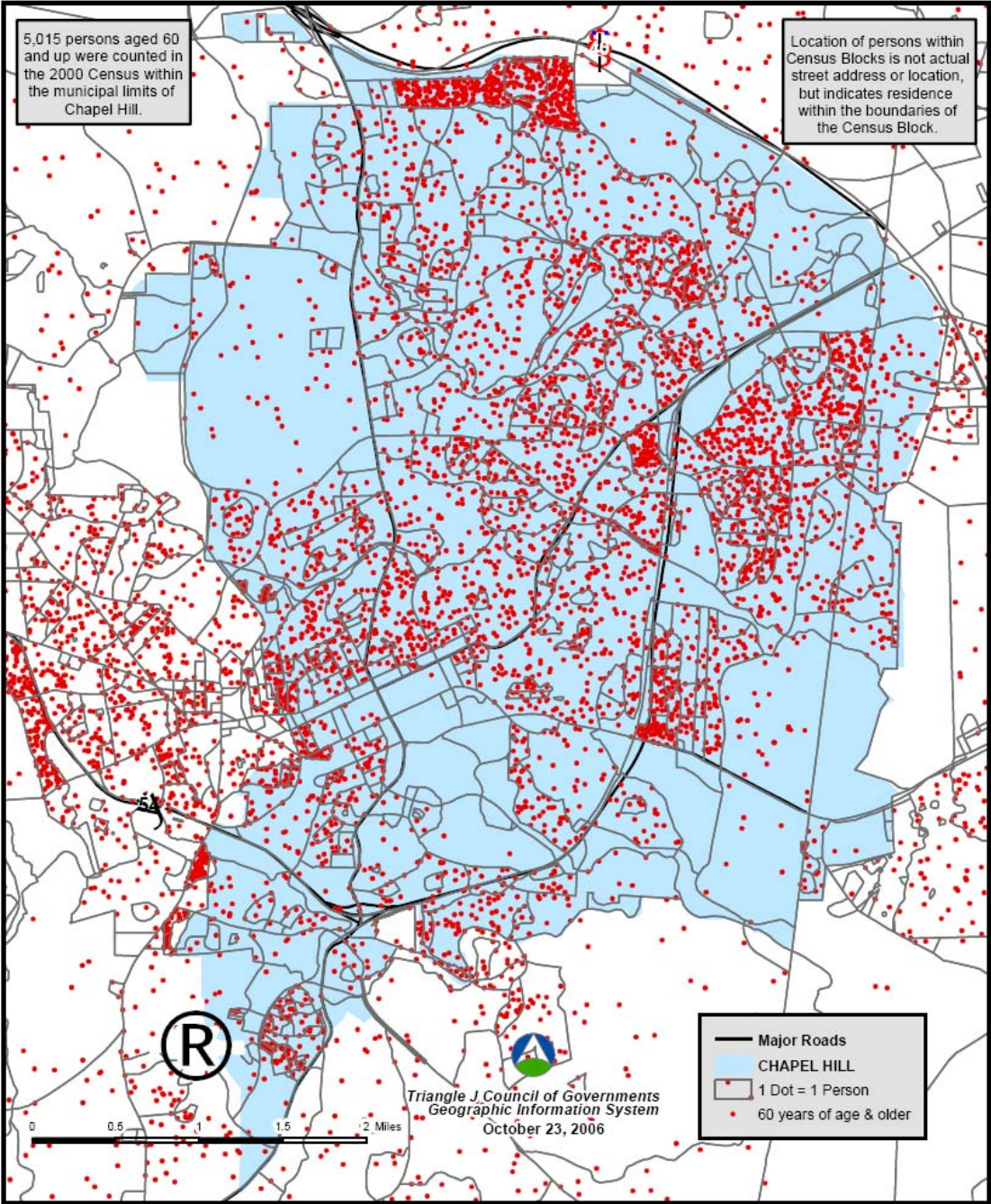
It is assumed that the operating cost for this service will be absorbed in the Chapel Hill Transit operating budget beyond FY 2008/09. In the event that clients of Orange County Public Transit utilize the service, Orange County Public Transit will contract with Chapel Hill Transit to support the service.

### Chapel Hill, NC Census 2000 Blocks Distribution of Persons 60 Years of Age and Older

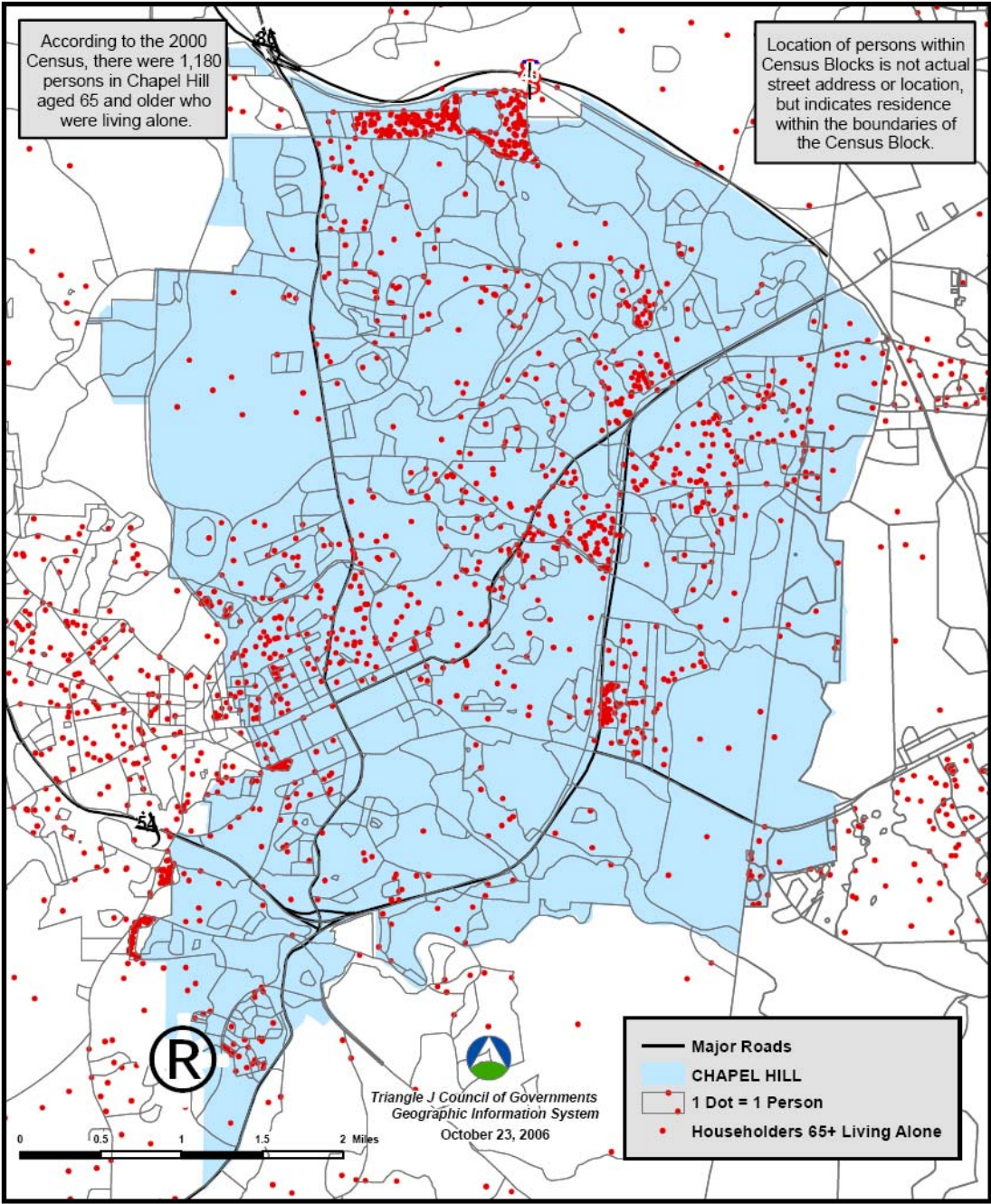


# Chapel Hill, NC Census 2000 Blocks

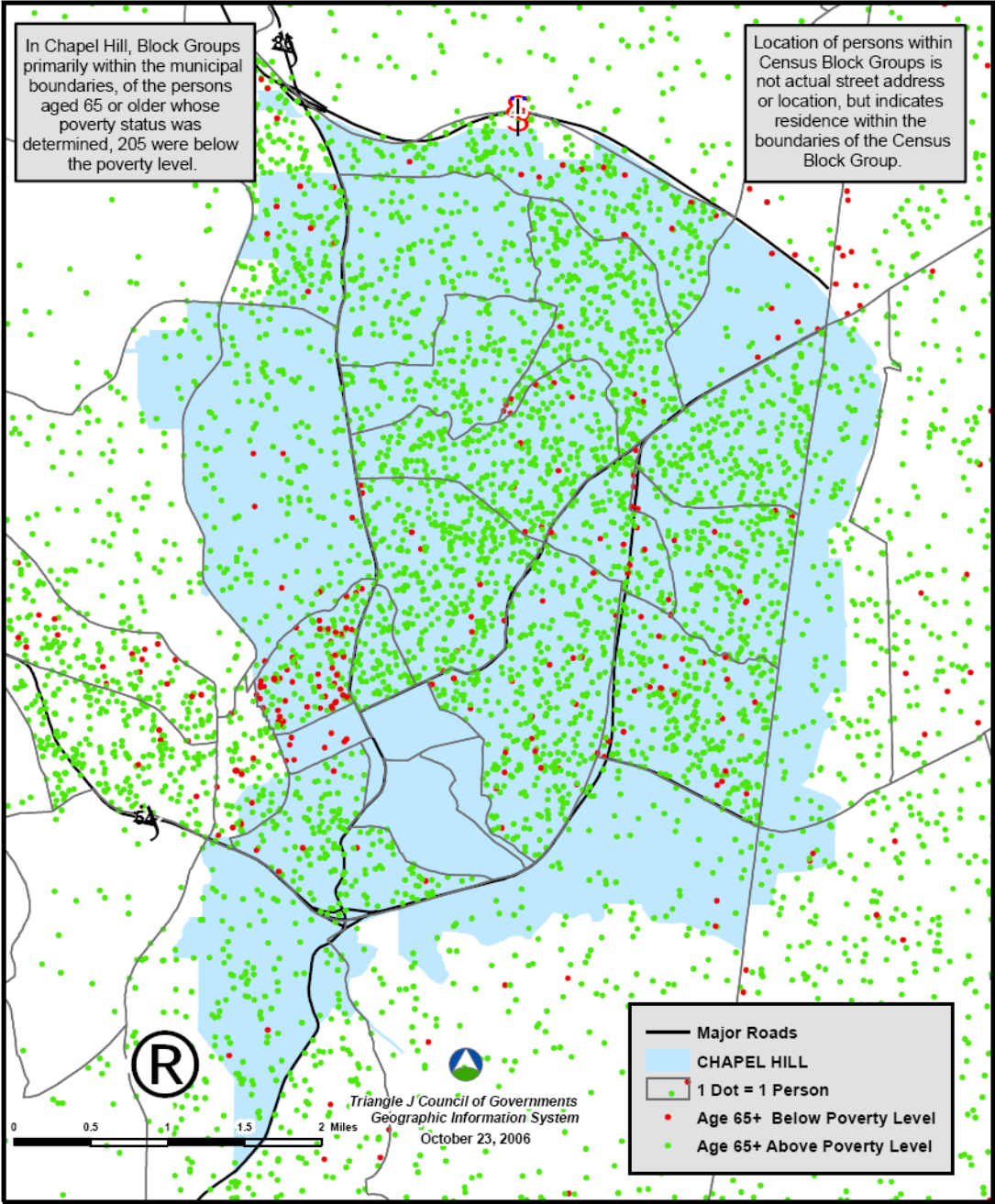
## Distribution of Persons 60 Years of Age and Older



# Chapel Hill, NC Census 2000 Blocks Distribution of Persons 65 Years of Age and Older Living Alone



# Chapel Hill, NC Census 2000 Block Groups Population 65 Years And Older For Whom Poverty Status Is Determined

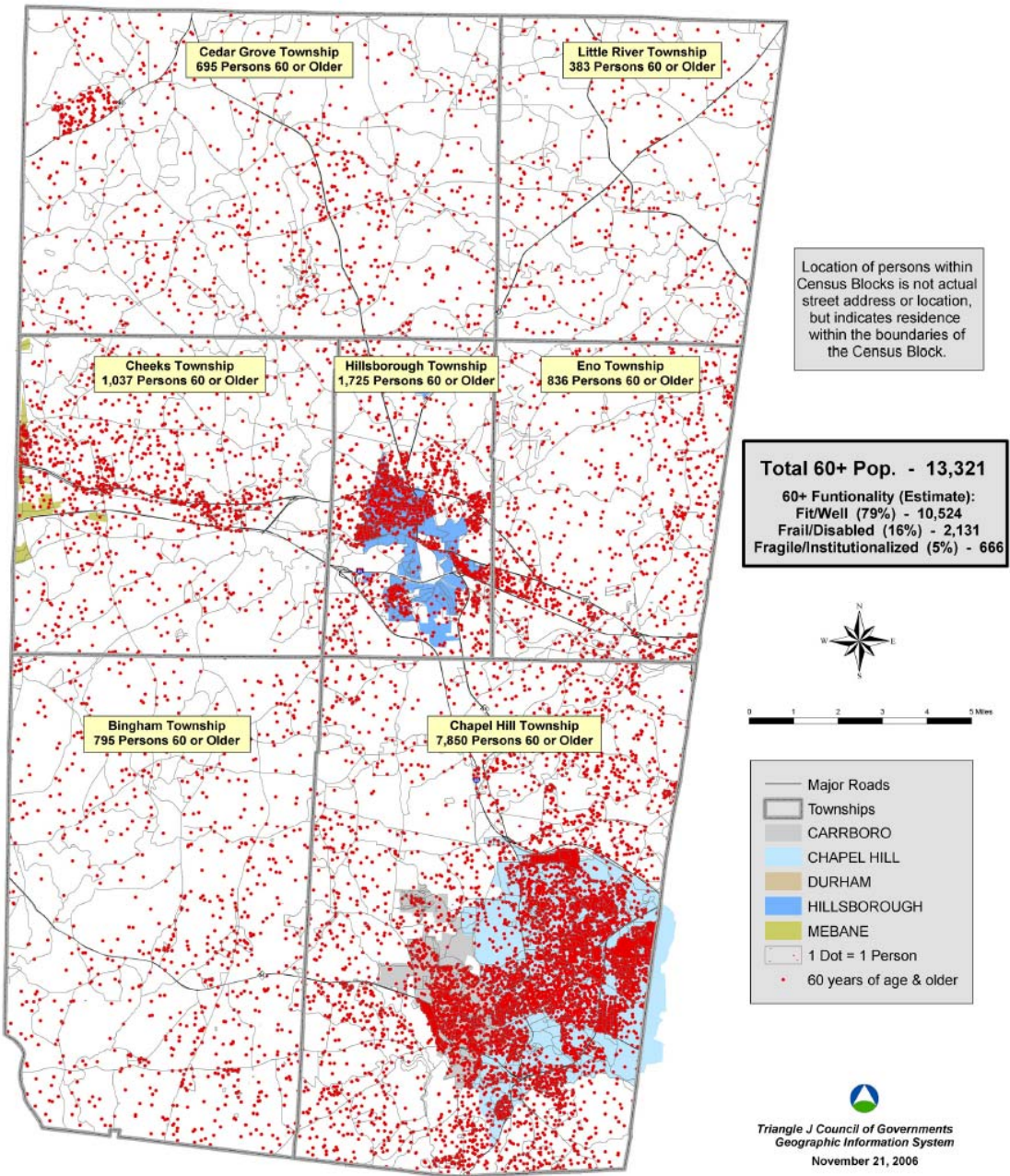


# Town of Chapel Hill, NC Census 2000

## Population Distribution by Older Age and Gender

	<u>Chapel Hill</u>	<u>% of Town Total</u>
<b>Total</b>	<b>48,715</b>	<b>100.0%</b>
<b>Male</b>	<b>21,961</b>	45.1%
M 45-59	2,968	6.1%
M 55+	2,758	5.7%
M 60+	2,011	4.1%
M 65+	1,521	3.1%
M 75+	675	1.4%
M 85 +	130	0.3%
<b>Female</b>	<b>26,754</b>	54.9%
F 45-59	3,404	7.0%
F 55+	3,827	7.9%
F 60+	3,004	6.2%
F 65+	2,400	4.9%
F 75+	1,349	2.8%
F 85 +	412	0.8%
<b>Total</b>	<b>48,715</b>	100.0%
45-59	6,372	13.1%
55+	6,585	13.5%
60+	5,015	10.3%
65+	3,921	8.0%
75+	2,024	4.2%
85 +	542	1.1%
65+ Live Alone	1,180	30.1%
65+ w/ Disability	1,316	33.6%
65+ Below Poverty	205	5.6%
65+ Minority		
65+ Male/Female Ratio =		1 to 1.578
75+ Male/Female Ratio =		1 to 1.999
85+ Male/Female Ratio =		1 to 3.17

# Orange County, NC Census 2000 Blocks Distribution of Persons 60 Years of Age and Older



## Orange County Population Projections By Age, Gender, Race 2007-2030

### July 2007 Projection

	<b>Total</b>	<b>5-17</b>	<b>55+</b>	<b>60+</b>	<b>65+</b>	<b>75+</b>	<b>85+</b>	<b>95+</b>
<b>Orange</b>	125,436	18,549	23,975	16,441	11,143	5,144	1,538	151
<b>Male</b>	65,128	9,062	13,183	9,272	6,527	3,288	1,119	128
<b>Female</b>	60,308	9,487	10,792	7,169	4,616	1,856	419	23
<b>Non-white</b>	24,183	4,311	3,836	2,683	1,871	813	248	29

### July 2010 Projection

<b>Orange</b>	130,719	19,408	27,135	18,916	12,353	5,327	1,631	151
<b>Female</b>	67,550	9,529	14,827	10,536	7,152	3,411	1,213	133
<b>Male</b>	63,169	9,879	12,308	8,380	5,201	1,916	418	18
<b>Non-white</b>	25,290	4,429	4,302	2,992	2,020	833	250	35
<b>% Change from Year 2007</b>	4.2%	4.6%	13.2%	15.1%	10.9%	3.6%	6.0%	0.0%

### July 2015 Projection

<b>Orange</b>	138,272	20,109	32,252	23,645	15,809	5,855	1,825	238
<b>Female</b>	71,098	9,834	17,561	13,064	8,933	3,680	1,296	194
<b>Male</b>	67,174	10,275	14,691	10,581	6,876	2,175	529	44
<b>Non-white</b>	26,794	4,463	5,228	3,663	2,421	941	283	44
<b>% Change from Year 2007</b>	10.2%	8.4%	34.5%	43.8%	41.9%	13.8%	18.7%	57.6%

### July 2020 Projection

<b>Orange</b>	146,769	21,319	36,897	28,340	20,102	7,187	1,951	244
<b>Female</b>	75,048	10,468	20,031	15,621	11,288	4,427	1,409	210
<b>Male</b>	71,721	10,851	16,866	12,719	8,814	2,760	542	34
<b>Non-white</b>	28,616	4,673	6,136	4,512	3,044	1,092	290	52
<b>% Change from Year 2007</b>	17.0%	14.9%	53.9%	72.4%	80.4%	39.7%	26.9%	61.6%

### July 2025 Projection

<b>Orange</b>	153,626	21,559	40,838	32,319	24,122	9,706	2,294	346
<b>Female</b>	78,362	10,546	22,106	17,836	13,578	5,820	1,588	275
<b>Male</b>	75,264	11,013	18,732	14,483	10,544	3,886	706	71
<b>Non-white</b>	30,030	4,792	6,895	5,298	3,747	1,380	360	62
<b>% Change from Year 2007</b>	22.5%	16.2%	70.3%	96.6%	116.5%	88.7%	49.2%	129.1%

### July 2030 Projection

<b>Orange</b>	161,118	22,522	43,811	35,592	27,403	12,589	2,909	318
<b>Female</b>	81,891	11,041	23,629	19,558	15,436	7,575	2,032	270
<b>Male</b>	79,227	11,481	20,182	16,034	11,967	5,014	877	48
<b>Non-white</b>	31,698	5,027	7,549	5,942	4,419	1,758	413	66
<b>% Change from Year 2007</b>	28.4%	21.4%	82.7%	116.5%	145.9%	144.7%	89.1%	110.6%

Source: NC State Data Center

Updated January 25, 2007

Prepared by Jerry Passmore & Yoke Crume





**ORANGE COUNTY DEPARTMENT ON AGING  
POST OFFICE BOX 8181  
600 HIGHWAY 86 NORTH  
HILLSBOROUGH, NORTH CAROLINA 27278**

*JERRY M. PASSMORE, DIRECTOR  
DIRECT TEL. - 919.245.2009*

[WWW.CO.ORANGE.NC.US/AGING](http://WWW.CO.ORANGE.NC.US/AGING)

February 27, 2008

Mr. K. Stephen Spade, Director  
Chapel Hill Transit  
6900 Millhouse Road  
Chapel Hill, NC 27516-8175

Dear Steve:

It is my pleasure to support your joint New Freedom funds application with Orange County to establish a Chapel Hill/Carrboro Cross Town Senior Shuttle that would pick up older adults at high density areas and take them directly to high demand community destinations like the Seymour Senior Center.

With the Older population doubling in Chapel Hill by 2020 and living older lives there will continue to be increase demand for transportation services, especially for frail older adults 75+. The current two tier transit design of providing public fixed routes for everyone and para-transit service (E-Z Rider) for the medically infirmed and disabled will not work for this changing demographic. Many older adults between 55 and 105, can not easily use the fixed route service requiring wait times and transfers nor do they qualify for the specialized para-transit service.

With your proposed new three tier transit design it will ensure more seniors, with a wide range of mobility needs, can access city and county community services. The Cross Town Senior Shuttle would potentially reduced or slow down the demand for the Chapel Hill Transit's expensive door to door E-Z Rider service.

The Department on Aging will be glad to assist in this project in anyway possible. We would be happy to organize focus groups of seniors for input on the initial experimental design as well as advertise in our Senior Times newspaper of this new service.

Thank you for being pro-active in responding to the Transit needs of older adults.

Sincerely,

Jerry M. Passmore, Director  
cc: Al Terry, OPT Manager



New Freedom  
Grant  
Proposal

**JOB ACCESS/REVERSE COMMUTE (JARC)  
AND NEW FREEDOM PROGRAMS  
APPLICATION FOR FUNDING (FFY 2007 and FFY 2008)**

**PART I – TRANSMITTAL**

**Applicant Data**

Legal Name: 2 U Transit, LLC  
Contact Person: Melvin Dixon  
Address: 907 Chalk Level Road  
City, State, Zip: Durham, North Carolina 27704  
Telephone: (919) 479-0929  
Fax: (919) 479-1807  
Email: office@2utransit.com

## **Part II – NARRATIVE**

### **Project Need, Goals and Objectives**

2 U Transit seeks to satisfy the high priority needs as listed below and identified in the Coordinated Plan. They are:

- To provide improved transportation and alternatives to public transportation for people with disabilities and special needs.
- To transport low-income recipients to and from jobs.
- To transport residents of urban, rural and suburban areas to employment opportunities (Reverse Commute).

2U Transit provides transportation services to the mobility impaired, both privately and contractually. The goal is to expand services to provide an alternative solution for those who have traditionally relied upon para-transit and/or public transportation. This benefits individuals as targeted operating schedules which are more closely aligned with individual needs can be developed.

The objective is to partner with DATA, supplementing their services and/or replacing routes that are no longer cost efficient for them to operate. Durham Tech, DECI, and LCC are programs that are currently being considered for participation in this project. This initiative will benefit the transit system as a whole as those entities can concentrate on serving more densely populated areas, which in turn, lowers their overall operational cost. At the same time, 2 U Transit can focus on providing reliable, cost-efficient services to underserved communities and populations.

The project plan calls for 2U Transit to partner with DATA, providing services to approximately 23 individuals on a daily basis. We anticipate 46 round trips per day at a cost of \$32.32 per passenger round trip or \$16.16 per passenger one way trip.

### **Implementation Plan**

#### **Service Operating Plan**

2 U Transit's operating schedule is 5 am to 9 pm Monday through Friday. We will be able to provide services during non-traditional hours (nights and weekends) as demand dictates.

See attached biographical sketch of Melvin Dixon and Elvira Basnight  
See attached summary of qualified personnel

## **Partnerships and Program Outreach**

We will provide DATA with monthly and/or quarterly reports that detail the rider-ship and demographics in order to validate the effectiveness and efficiency of the project.

Marketing materials will be available for key stakeholders and partners in order to heighten public awareness.

## **Program Effectiveness and Performance Indicators**

The most effective measurable outcome will be the detailed daily trip logs that we will maintain. Examples of the data we intend to collect include but are not limited to the following:

- Customer Info: Name, address, contact information
- Pick up and drop off times
- Type of trip/destination

Continuous quality improvement measures as well as constant contact and feedback from our key stakeholders should ensure that we are able to meet and exceed the project expectations

## **Summary of Qualified Personnel**

2U Transit employs drivers that are highly qualified. Under 2U Transit's direction current and future drivers are carefully screened. This includes criminal background check, driving record review, and substance screening. The company looks for caring, compassionate professionals. Drivers are carefully trained in various safety techniques including proper loading/unloading of passengers and wheelchair securement. Procedures and policies to be utilized in the event of an emergency are thoroughly covered.



**PART III - PROJECT BUDGET**

**Project Funding**

Local matching funds will be required for all application submittals. For projects requiring operating funds, the required match is 50%+ from non-federal transportation funds. For capital projects the required match is 20%+ from non-federal transportation funds.

Please include a certified financial statement from an accountant or bank.

Total Annual Project Budget \$ 119,592 (operating and capital only)

Capital Federal Share \$ \_\_\_\_\_ %

Capital Local Match \$ \_\_\_\_\_ %

Operating Federal Share \$ 59,796 50 %

Operating Local Match \$ 59,796 50 % Total

Local Match Funding Source      Operating revenue

*Note: The applicant is required to demonstrate a commitment to providing local match funds. This can be in the form of a letter and/or a copy of an existing grant agreement or supporting documentation where funds will be drawn from. Financial information must be certified by an accountant or financial institution.*

Will there be a commitment of funds beyond the grant period?       Yes       No

Describe: 2 U Transit seeks a long-term relationship with DATA and is committed to providing funds beyond the grant period.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

# 2 U Transit

## Projected Profit & Loss Statement - 2008

	1	2	3	4	5	6	7	8	9	10	11	12	TOTAL
<b>REVENUES</b>													
Normal Operating Budget	23000	23000	23000	23000	23000	23000	23000	23000	23000	23000	23000	23000	276000
Service Revenue	23000	23000	23000	23000	23000	23000	23000	23000	23000	23000	23000	23000	276000
<b>OPERATING EXPENSES</b>													
Payroll Burden	10000	10000	10000	10000	10000	10000	10000	10000	10000	10000	10000	10000	120000
Payroll Taxes	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	12000
Telephone	400	400	400	400	400	400	400	400	400	400	400	400	4800
Maintenance & repair	500	500	500	500	500	500	500	500	500	500	500	500	6000
Accounting/Payroll	400	400	400	400	400	400	400	400	400	400	400	400	4800
Insurance	1700	1700	1700	1700	1700	1700	1700	1700	1700	1700	1700	1700	20400
Office supplies	500	500	500	500	500	500	500	500	500	500	500	500	6000
Fuel	7000	7000	7000	7000	7000	7000	7000	7000	7000	7000	7000	7000	84000
<b>TOTAL OPERATING EXPENSES</b>	<b>21500</b>	<b>21500</b>	<b>21500</b>	<b>21500</b>	<b>21500</b>	<b>21500</b>	<b>21500</b>	<b>21500</b>	<b>21500</b>	<b>21500</b>	<b>21500</b>	<b>21500</b>	<b>258000</b>
<b>PROFIT (OR LOSS)</b>	<b>1500</b>	<b>1500</b>	<b>1500</b>	<b>1500</b>	<b>1500</b>	<b>1500</b>	<b>1500</b>	<b>1500</b>	<b>1500</b>	<b>1500</b>	<b>1500</b>	<b>1500</b>	<b>18000</b>
<b>Grant Project Operating Budget</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>	<b>11</b>	<b>12</b>	<b>TOTAL</b>
OPERATING EXPENSES													
Payroll Burden	4325	4325	4325	4325	4325	4325	4325	4325	4325	4325	4325	4325	51900
Payroll Taxes	347	347	347	347	347	347	347	347	347	347	347	347	4160
Health Insurance	150	150	150	150	150	150	150	150	150	150	150	150	1800
Maintenance & repair	833	833	833	833	833	833	833	833	833	833	833	833	10000
Workers comp	417	417	417	417	417	417	417	417	417	417	417	417	5000
Insurance	1261	1261	1261	1261	1261	1261	1261	1261	1261	1261	1261	1261	15132
Office expense	633	633	633	633	633	633	633	633	633	633	633	633	7600
Fuel	2000	2000	2000	2000	2000	2000	2000	2000	2000	2000	2000	2000	24000
<b>TOTAL OPERATING EXPENSES</b>	<b>9966</b>	<b>9966</b>	<b>9966</b>	<b>9966</b>	<b>9966</b>	<b>9966</b>	<b>9966</b>	<b>9966</b>	<b>9966</b>	<b>9966</b>	<b>9966</b>	<b>9966</b>	<b>119592</b>

**BIOGRAPHICAL SKETCH****ELVIRA BASNIGHT**

Elvira Basnight is the Managing Owner of 2U Transit. She has more than 20 years of exposure to the Paratransit and healthcare industries. She was an active advocate in bringing about the first official Paratransit service in Durham County.

A resident of Durham for approximately 20 years, Ms. Basnight has long been involved in community development and has gained extensive experience over the years working with the City of Durham, its Council, and a variety of community focused programs. She has been a frequent spokesperson for ADA compliance and diversity awareness within the community and the workplace. Ms. Basnight continues to strongly support *the concept of independence and equality for those with special needs*. With her experience and technological skills, Ms. Basnight is often called upon to speak for and demonstrate Assistive Technology and its vital role in the lives of the disabled.

Ms. Basnight received an associate degree in liberal arts from Durham Technical Community College and a bachelors of science in business administration from Mount Olive College, North Carolina. She was also certified as a STAR Mentor for the visually impaired by the North Carolina Department of Services for the Blind.

Ms. Basnight has been employed in the medical arena for more than twenty years. She has participated in civil service employment (City of New York), federal (Durham VA) and, most recently has been employed in the private sector at Duke University Medical Center. Ms. Basnight's resourcefulness and problem-solving abilities have proven essential in her almost 25 years of active employment.

**BIOGRAPHICAL SKETCH****Melvin Dixon**

Melvin Dixon has approximately 5 years of experience working in the Paratransit industry. He was employed by Laidlaw Transit Services, Inc. He began his work there as a paratransit van operator. Mr. Dixon was responsible for safe, dependable, and efficient transport of clients throughout the city, county, and surrounding areas of Durham.

Mr. Dixon quickly advanced through the ranks of driver-road supervisor to Operations Manager at Laidlaw Transit. He was promoted to field/road supervisor with responsibilities including on the road training of new employees, and road monitoring. Mr. Dixon has his CDL License and has been certified as an instructor for Paratransit vehicle operations. Mr. Dixon was also responsible for assisting the Director of District Safety (DDS) manager with incidence/accidents occurring during service hours. Additionally, Mr. Dixon skillfully provided mentoring to new van operators at multiple levels in their employment with Laidlaw. This included classroom/book training, behind the wheel training and continued follow up once released into service.

In April 2004, Mr. Dixon was promoted to Operations Manager. In this role he was responsible for monitoring the reservations and scheduling of passengers. While overseeing scheduling, Mr. Dixon insured there was adequate van operators to provide transportation daily. He managed a dispatching team of four, a reservation team of two, and 29 plus van operators each day.

As Operations manager Mr. Dixon was responsible for handling all public relations. Over the years, he has acquired extensive knowledge and experience in the Paratransit industry and is strongly committed to the further provision of services to the special needs community.

LETTER OF INTENT

To Pierre Owusu:

This letter of intent is to confirm partnership between DATA and 2U Transit,LLC to provide services for LCC, Durham Tech, and DECI. The cost agreed upon in the amount of: \$ 32.32 per passenger (Round-Trip) or \$ 16.16 per (One-Way) passenger trip. Upon finalization of terms and conditions 2U Transit will provide transportation services.

Thank-You  
Melvin Dixon  
Operation Manager

2U Transit  
Durham, NC  
919/479-0929 (office)  
919/824-9410 (cell)  
919/479-1807 (fax)

Org: 001 Serv: DDA Acct: 2000021668746

C/W:

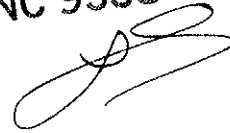
	AVG BAL	NSF/UNC	UAV	ITEMS	RET	OD	OCCUR	CHG	BCK
This Month:	4055.02	0	0	0	0	0	0	0	0
YTD Total :	3115.09	0	0	0	0	0	0	0	0
12M Total :	4131.72	0	0	0	0	0	0	1	0
Jan 2008 :	2539.00	0	0	0	0	0	0	0	0
Feb 2007 :	4073.00	0	0	0	0	0	0	0	0
Mar 2007 :	3697.00	0	0	0	0	0	0	0	0
Apr 2007 :	6820.00	0	0	0	0	0	0	0	0
May 2007 :	11190.00	0	0	0	0	0	0	0	0
Jun 2007 :	5508.00	0	0	0	0	0	0	0	0
Jul 2007 :	3665.00	0	0	0	0	0	0	0	0
Aug 2007 :	2177.00	0	0	0	0	0	0	0	1
Sep 2007 :	4097.00	0	0	0	0	0	0	0	0
Oct 2007 :	2505.00	0	0	0	0	0	0	0	0
Nov 2007 :	2120.00	0	0	0	0	0	0	0	0
Dec 2007 :	1243.00	0	0	0	0	0	0	0	0

NSF/UNC/OD/UAV Tier: 000

Command:

F1=Help F3=Exit

North Duke Branch  
NC 9538



Laura Stone  
Financial Specialist  
919-471-5110.

2 U Transit LLC  
Financial Statements  
For the period ended December 31, 2007

# 2 U Transit

Project Budget

		Share Contribution %
Total Annual Budget (Operating and Capital Only)	\$ 109,292	
Total Operating Budget	\$ 109,292	
Total Capital Budget	-	
Capital Federal Share	\$ -	80%
Capital Local Match	\$ -	20%
Operating Federal Share	\$ 54,646	50%
Operating Local Match	\$ 54,646	50%
Total Annual Budget	\$ 109,292	

Local Matching Fund Source

The local match will come from the operating revenue as documented on the attached bank statements.

## Table of Contents

Balance Sheet	Page 1
Income Statement	Page 2
Statement of Cash Flows	Page 4

**Balance Sheet**  
**December 31, 2007**

Assets

Current assets

Cash

Cash - Wachovia	\$	2,162.30
-----------------	----	----------

Money Market Account		1,756.13
----------------------	--	----------

Other current assets		1,202.55
----------------------	--	----------

Total Current assets		5,120.98
----------------------	--	----------

Property plant and equipment

Automobiles & trucks		8,653.96
----------------------	--	----------

Total Property plant and equipment		8,653.96
------------------------------------	--	----------

Total Assets	\$	<u>13,774.94</u>
--------------	----	------------------

Liabilities and Equity

Current liabilities

Long-term debt - current portion	\$	291.90
----------------------------------	----	--------

Total Current liabilities		291.90
---------------------------	--	--------

Long-term liabilities

Long-term debt		38,458.87
----------------	--	-----------

Total Long-term liabilities		38,458.87
-----------------------------	--	-----------

Equity

Retained earnings		(25,660.93)
-------------------	--	-------------

Capital contributed		685.10
---------------------	--	--------

Total Equity		<u>(24,975.83)</u>
--------------	--	--------------------

Total Liabilities and Equity	\$	<u>13,774.94</u>
------------------------------	----	------------------

See accompanying accountant's compilation report

**Income Statement**  
For the period ended December 31, 2007

	Current	Percent	YTD
Operating revenue			
Sales	\$ 3,316.82	100.00	\$ 64,112.78
Total Operating revenue	3,316.82	100.00	64,112.78
Operating expenses			
Advertising	0.00	0.00	25.12
Employee benefits	0.00	0.00	481.78
Insurance	0.00	0.00	15,974.89
Legal and accounting	180.00	5.43	2,100.00
Meals and entertainment	0.00	0.00	19.28
Office expenses	1,101.37	33.21	14,011.41
Other expenses	0.00	0.00	2,571.60
Other taxes	0.00	0.00	303.37
Payroll taxes	0.00	0.00	4,189.75
Repairs and maintenance	0.00	0.00	6,926.85
Wages and salaries	1,048.71	31.62	14,758.94
Total Operating expenses	2,330.08	70.25	61,362.99
Income From Operations	<u>986.74</u>	<u>29.75</u>	<u>2,749.79</u>
Other income			
Interest income	0.00	0.00	9.77
Other income	0.00	0.00	2.01
Total Other income	0.00	0.00	11.78
Other expenses			
Other expenses	0.00	0.00	120.00
Total Other expenses	0.00	0.00	120.00
Net Income (Loss)	<u>986.74</u>	<u>29.75</u>	<u>2,641.57</u>
Retained earnings, beginning	(26,647.67)		(28,302.50)
Retained earnings, ending	<u>\$ (25,660.93)</u>		<u>\$ (25,660.93)</u>

See accompanying accountant's compilation report

( ) Trustee's Report  
**Supporting Schedule - Income Statement**  
 For the period ended December 31, 2007

	Current	YTD
Office expenses		
Fuel	\$ 999.37	\$ 7,617.07
Mileage reimbursement	0.00	501.91
Office expenses	102.00	5,892.43
Total Office expenses	<u>\$ 1,101.37</u>	<u>\$ 14,011.41</u>
Other expenses		
Bank charges	\$ 0.00	\$ 14.00
Licenses	0.00	648.48
Postage	0.00	33.12
Telephone	0.00	1,876.00
Total Other expenses	<u>\$ 0.00</u>	<u>\$ 2,571.60</u>

See accompanying accountant's compilation report

**Statement of Cash Flows**  
For the period ended December 31, 2007

	Current	YTD
Cash flows from operating activities		
Net income/(loss)	\$ 986.74	\$ 2,641.57
Decrease/(increase) in other current assets	200.00	8,900.55
Net cash provided by (used in) operating activities	<u>1,186.74</u>	<u>11,542.12</u>
Cash flows from investing activities		
Investment in fixed assets	0.00	(5,803.96)
Net cash provided by (used in) investing activities	<u>0.00</u>	<u>(5,803.96)</u>
Cash flows from financing activities		
Proceeds from long-term debt	(494.00)	(10,904.41)
Net cash provided by (used in) financing activities	<u>(494.00)</u>	<u>(10,904.41)</u>
Net Increase/(decrease) in Cash	692.74	(5,166.25)
Cash at Beginning of Period	<u>3,225.69</u>	<u>9,084.68</u>
Cash at End of Period	<u>\$ 3,918.43</u>	<u>\$ 3,918.43</u>

See accompanying accountant's compilation report



# Business Checking

01 2000021868746 001 130 0 32 69,753

WACHOVIA

00015127 02 AT 0.459 02 3DG 54



2 U TRANSIT LLC  
907 CHALK LEVEL ROAD  
DURHAM NC 27704

CB

## Business Checking

12/01/2007 thru 12/31/2007

Account number: 2000021868746  
Account owner(s): 2 U TRANSIT LLC

### Account Summary

Opening balance 12/01	\$1,469.56
Deposits and other credits	3,518.82 +
Checks	1,048.71 -
Other withdrawals and service fees	1,775.37 -
Closing balance 12/31	\$2,162.30

### Deposits and Other Credits

Date	Amount	Description
12/03	200.00	TRNSFR 3000078374121 12/02 ONLINE TRNSFR CONFIRMATION # VY77159897
12/03	1,000.00	DEPOSIT
12/10	107.75	DEPOSIT
12/17	385.00	DEPOSIT
12/20	125.88	DEPOSIT
12/26	487.75	DEPOSIT
12/26	690.44	DEPOSIT
12/31	520.00	DEPOSIT
<b>Total</b>	<b>53,518.92</b>	

### Checks

Number	Amount	Date posted	Number	Amount	Date posted	Number	Amount	Date posted
10071	51.37	12/07	10078	66.50	12/20	10080	282.55	12/28
10072	44.46	12/05	10077	136.31	12/17	<b>Total</b>	<b>\$1,048.71</b>	
10073	114.95	12/04	10078	51.28	12/14			
10075*	166.23	12/17	10079	135.06	12/31			

\* Indicates a break in check number sequence







WACHOVIA

**Business Checking**

01 2000021668746 001 130 0 32 76,971

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

00016949 02 AT 0.459 02 3DG 66



2 U TRANSIT LLC  
907 CHALK LEVEL ROAD  
DURHAM NC 27704

CB

**Business Checking**

9/01/2007 thru 9/28/2007

Account number: 2000021668746  
Account owner(s): 2 U TRANSIT LLC

**Account Summary**

Opening balance 9/01	\$2,486.14
Deposits and other credits	8,154.60 +
Checks	2,118.11 -
Automated Checks	114.95 -
Other withdrawals and service fees	2,827.82 -
Closing balance 9/28	\$5,559.86

**Deposits and Other Credits**

Date	Amount	Description
9/04	1,210.00	DEPOSIT
9/07	30.00	DEPOSIT
9/13	60.00	DEPOSIT
9/13	6,400.00	TRANSFER FROM 511111160795489
9/20	150.00	DEPOSIT
9/28	804.60	DEPOSIT
<b>Total</b>	<b>\$8,154.60</b>	

**Checks**

Number	Amount	Date posted	Number	Amount	Date posted	Number	Amount	Date posted
1175	60.00	9/17	1180	50.00	9/21	10058	550.00	9/20
1177*	67.35	9/17	1181	500.00	9/19	10059	37.40	9/25
1179*	303.37	9/17	:0057*	549.99	9/07	<b>Total</b>	<b>\$2,118.11</b>	

\* Indicates a break in check number sequence (checks could be listed under Automated Checks)



Business Checking

01 2000021668746 001 130 0 32 SAFEKEPT Replacement Statement 001

2 U TRANSIT LLC  
 907 CHALK LEVEL ROAD CB  
 DURHAM NC 27704

Business Checking

6/30/2007 thru 7/31/2007

Account number: 2000021668746  
 Account owner(s): 2 U TRANSIT LLC

Account Summary

Opening balance 6/30 \$7,178.40  
 Deposits and other credits 7,115.25 +  
 Checks 3,471.67 -  
 Automated Checks 115.03 -  
 Other withdrawals and service fees 5,683.35 -  
 Closing balance 7/31 \$5,023.60

Deposits and Other Credits

Date	Amount	Description	
7/12	400.00	DEPOSIT	000003418295642
7/16	2,515.25	DEPOSIT	000003319139248
7/26	110.00	DEPOSIT	000005712611953
7/30	1,500.00	TRNSFR 3000078374121 07/29 ONLINE TRNSFR CONFIRMATION # VY59598241	200707292102045
7/31	2,590.00	DEPOSIT	000005713608950
Total	\$7,115.25		

Checks

Number	Amount	Date	Number	Amount	Date	Number	Amount	Date
1163	230.00	7/24	10049	550.00	7/12	10053	1,245.64	7/16
1165*	501.91	7/31	10050	19.11	7/23	10054	550.00	7/27
10046*	27.43	7/09	10051	196.00	7/16	Total	\$3,471.67	
10048*	83.12	7/09	10052	68.46	7/17			

\*Indicates a break in check number sequence (checks could be listed under Automated Checks)







**Business Checking**

01 2000021668746 001 190 0 32 81,187

WACHOVIA

00017190 02 AT 0.545 02 3DG 65  
 2 U TRANSIT LLC  
 907 CHALK LEVEL ROAD  
 DURHAM NC 27704

CB

**Business Checking**

3/31/2007 thru 4/30/2007

Account number: 2000021668746  
 Account owner(s): 2 U TRANSIT LLC

**Account Summary**

Opening balance 3/31	\$4,549.98
Deposits and other credits	11,626.22 +
Checks	3,800.22 -
Automated Checks	89.51 -
Other withdrawals and service fees	2,801.29 -
Closing balance 4/30	\$9,505.08

**Deposits and Other Credits**

Date	Amount	Description
4/09	200.00	DEPOSIT
4/10	675.00	REFUND U OF W-MIL SCH. OF 04/09 4828801046771 MILWAUKEE WI 1013V771309
4/12	6,971.25	DEPOSIT
4/16	1,904.80	DEPOSIT
4/23	1,765.37	DEPOSIT
4/28	110.00	DEPOSIT
<b>Total</b>	<b>\$11,626.22</b>	

**Checks**

Number	Amount	Date posted	Number	Amount	Date posted	Number	Amount	Date posted
1135	32.40	4/02	10028*	550.00	4/05	10034	550.00	4/20
1136	35.00	4/16	10029	102.95	4/06	10035	86.88	4/25
1138*	72.91	4/16	10030	77.30	4/16	10036	110.53	4/23
1139	40.00	4/17	10031	160.00	4/17	<b>Total</b>	<b>\$3,800.22</b>	
1140	803.38	4/16	10032	1,042.52	4/13			
1141	80.00	4/30	10033	57.02	4/16			

\* Indicates a break in check number sequence (checks could be listed under Automated Checks)



# Business Checking

01 2000021668746 001 130 0 32 77,288

00016354 02 AT 0.545 02 3DG 58



2 U TRANSIT LLC  
907 CHALK LEVEL ROAD  
DURHAM NC 27704

CB

## Business Checking

3/01/2007 thru 3/30/2007

Account number: 2000021668746  
Account owner(s): 2 U TRANSIT LLC

### Account Summary

Opening balance 3/01	\$4,717.71
Deposits and other credits	8,888.52 +
Checks	3,206.11 -
Automated Checks	115.19 -
Other withdrawals and service fees	5,732.95 -
Closing balance 3/30	\$4,549.98

### Deposits and Other Credits

Date	Amount	Description
3/05	345.00	DEPOSIT
3/09	560.00	DEPOSIT
3/14	2,000.00	TRNSFR 20C0029530986 05/14 ONLINE TRNSFR CONFIRMATION # VY41432652
3/15	166.52	DEPOSIT
3/19	4,785.00	DEPOSIT
3/23	150.00	DEPOSIT
3/26	880.00	DEPOSIT
<b>Total</b>	<b>\$8,888.52</b>	

### Checks

Number	Amount	Date posted	Number	Amount	Date posted	Number	Amount	Date posted
1127	40.00	3/07	10018*	119.68	3/01	10025	550.00	3/23
1128	128.71	3/07	10020*	99.75	3/02	10026	159.16	3/23
1130*	692.30	3/20	10021	86.86	3/05	10027	147.54	3/26
1131	22.17	3/21	10022	549.99	3/09	<b>Total</b>	<b>\$3,206.11</b>	
1132	280.61	3/23	10023	78.96	3/23			
1134*	80.00	3/29	10024	170.38	3/13			

\* Indicates a break in check number sequence (checks could be listed under Automated Checks)



# Business Checking

WACHOVIA

01 2000021668746 001 130 0 32 77,202

00016719 02 AT 0.545 02 3DG 59



2 U TRANSIT LLC  
907 CHALK LEVEL ROAD  
DURHAM NC 27706

CB

## Business Checking

2/01/2007 thru 2/28/2007

Account number: 2000021668746  
Account owner(s): 2 U TRANSIT LLC

### Account Summary

Opening balance 2/01	\$5,119.23
Deposits and other credits	6,145.66 +
Checks	2,607.20 -
Automated Checks	70.41 -
Other withdrawals and service fees	3,869.57 -
<b>Closing balance 2/28</b>	<b>\$4,717.71</b>

### Deposits and Other Credits

Date	Amount	Description
2/05	464.90	DEPOSIT
2/12	1,725.51	DEPOSIT
2/13	1,675.00	DEPOSIT
2/20	1,950.25	DEPOSIT
2/26	330.00	COUNTER DEPOSIT
<b>Total</b>	<b>\$6,145.66</b>	

### Checks

Number	Amount	Date posted	Number	Amount	Date posted	Number	Amount	Date posted
1121	73.24	2/07	1126	40.00	2/26	10016	550.00	2/23
1122	22.17	2/14	10013*	1,030.72	2/12	10017	156.02	2/26
1124*	481.78	2/16	10014	192.50	2/12	<b>Total</b>	<b>\$2,607.20</b>	
1125	40.00	2/15	10015	20.77	2/23			

\* Indicates a break in check number sequence (checks could be listed under Automated Checks)

### Automated Checks

Number	Amount	Date	Description
1123	70.41	2/13	AJTOMATED CHECK VERIZON WEST ARC VERIZONTX CO. ID. 100502223D 070213 ARC MISC 1123
<b>Total</b>	<b>\$70.41</b>		



# Business Checking

01 2000021668746 001 130 0 32 77,486

WACHOVIA

00016400 02 AT 0.545 02 3DG 57  
 2 U TRANSIT LLC  
 907 CHALK LEVEL ROAD  
 DURHAM NC 27704

CB

## Business Checking

12/30/2006 thru 1/31/2007

Account number: 2000021668746  
 Account owner(s): 2 U TRANSIT LLC

### Account Summary

Opening balance 12/30	\$4,038.32
Deposits and other credits	3,942.74 +
Checks	733.52 -
Automated Checks	67.27 -
Other withdrawals and service fees	2,061.04 -
Closing balance 1/31	\$5,119.23

### Deposits and Other Credits

Date	Amount	Description
1/08	79.46	DEPOSIT
1/08	112.00	DEPOSIT
1/11	206.52	DEPOSIT
1/19	1,472.00	DEPOSIT
1/25	315.00	DEPOSIT
1/29	1,757.76	DEPOSIT
<b>Total</b>	<b>\$3,942.74</b>	

### Checks

Number	Amount	Date posted	Number	Amount	Date posted	Number	Amount	Date posted
1086	25.00	1/10	1118	70.00	1/17	10011	149.68	1/16
1114*	73.19	1/12	1119	208.00	1/23	10012	9.79	1/16
1116*	27.00	1/16	1120	119.12	1/19	<b>Total</b>	<b>\$733.52</b>	
1117	40.00	1/12	10010*	11.74	1/12			

\* Indicates a break in check number sequence (checks could be listed under Automated Checks)

JOB ACCESS/REVERSE COMMUTE (JARC) TCC 4/23/08 Attachment 6C  
AND NEW FREEDOM PROGRAMS  
**APPLICATION FOR FUNDING**

**PART I - TRANSMITTAL**

**Applicant Data**

Legal Name: Town of Chapel Hill, Chapel Hill Transit

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Contact Person: Steve Spade, Transit Director

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Address: 6900 Millhouse Road

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City, State, Zip: Chapel Hill, NC 27516

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Telephone: 919-969-4909

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Fax: 919-968-2840

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E-mail: [sspade@townofchapelhill.org](mailto:sspade@townofchapelhill.org)

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## Project Description

TCC 4/23/08 Attachment 6C

TITLE Chapel Hill Transit HS Route Expansion/Rogers Road

BRIEF DESCRIPTION Chapel Hill Transit requests financial support to expand the HS Route to introduce new service to the Rogers Road community and midday service throughout the route. Service would provide transit to a low income neighborhood currently not served and improve access to transit along the current HS Route.

FUNDING PROGRAM: JARC  New Freedom

PROJECT TYPE Capital Only   Capital and Operating

Operating Only   Mobility Management/Coordinated  
Planning

SERVICE DAYS/HOURS Service would operate 13 hours daily/255 days/year

ESTIMATED COST PER ONE WAY TRIP \$1.22 (boarded passenger)

ESTIMATED DAILY RIDERS 544 weekday (weekday/weekend)

## **Project Need/Goals & Objectives**

For nearly 150 years African-American families have lived in what is now known as the Rogers-Eubanks community. In the late 1800's, Rogers Road was a wagon track through black owned family farmland and sawmills that stretched from Homestead to Eubanks and Millhouse Roads. Today, the Rogers Road community lies on the northern edge of Chapel Hill and Carrboro. The predominantly minority community experiences inferior public transit options compared to the rest of the community.

Currently, the Rogers Road community is serviced by the HS and the NS/Eubanks Park and Ride lot. (see system map – attachment 1). The Eubanks Park and Ride lot is approximately 1.7 miles from Rogers Road and Purefoy Lane, while the nearest HS bus stop, at Homestead and Rogers Road, is more than half a mile away from Rogers Road and Purefoy Lane. The HS only runs during school peak hours, at 30 minute headways, providing very limited quality of service. The NS has headways ranging from 20 minutes to 1 hour in length, again providing limited service to this community.

Census 2000 data indicates that especially within the Purefoy Lane community, there is a significant minority, low income population, in need of quality transit options. There are limited employment opportunities within the zone, making it necessary to provide appropriate transportation alternatives for work trips as well as non-work trips.

The need for transit service for the Rogers Road community is a priority for Chapel Hill and Carrboro. Public input at community forums in both Carrboro and Chapel Hill confirm this priority. Residents of the Rogers Road community have requested extension of public transit services for the past three years.

Because the area is predominately minority and low income, it is an area targeted by the CPT-HSTP. 2000 census data (see attachments 2, 3 & 4) indicates that the Rogers Road community is a significant minority low income population. While Chapel Hill as a whole is 22% minority and 44% low income (defined as having a household income less than 50% of the AMI), the census block directly east of Rogers Road is 60% minority and the TAZ directly east is 55% low income. This population has no quality transit options. There are limited employment areas within the Rogers Road community, making it necessary for persons seeking employment to rely on transportation alternatives other than public transit for work trips. This is also the case for non work trips, as the lack of transit service limits access to other community activities for the elderly, young and other persons unable to drive.

## **Service Description**

The current HS route provides service from downtown Chapel Hill along Martin Luther King Jr. Blvd., Estes and Seawell School Road to Chapel Hill High School (see attachment 5). The service operates approximately every 30 minutes during the rush hour only. There is no midday service (see attachment 5).

Today the HS Route serves approximately 200 riders daily. The majority of these riders are students traveling to Chapel Hill High School. Thus, this route is serving a reverse commute activity. There is little travel to downtown Chapel Hill and the University on the HS Route. Chapel Hill Transit proposes to modify the HS route extending service north on Rogers Road to serve the heart of the Rogers Road community (see attachment 6). In addition, midday service

would be implemented providing access to work trips during the rush hour, and midday service for the elderly population in the area. TGG 4/23/08 Attachment 6C

The HS Route will then serve three new markets.

1. The Rogers Road community
2. University of North Carolina students who work or volunteer at the schools
3. Residents along the current HS route that want to travel to UNC

The lack of midday service has been cited by UNC as a reason students cannot be assigned to Chapel Hill High School. Midday service will provide flexibility to UNC students as well as Chapel Hill High students. More flexible schedules will also make inbound trips more attractive to consumers.

### Project Goals and Objectives

Project goal: Improve mobility of Carrboro and Chapel Hill citizens residing in the Rogers Road community.

Objectives:

- Provide access to jobs, recreation and other community activities for low income residents of Rogers Road community
- Provide access to volunteer, work and learning opportunities at Chapel Hill High School for UNC students
- Reduce reliance on the single occupancy vehicle
- Respond to community need for transportation alternatives

### Community Benefit

Expansion of the HS Route benefits the community and meets human service transportation priorities in several ways.

- Service will be provided to target populations of low income and minority populations
- Introduction of service on Rogers Road constitutes transportation outreach to a segment of the community previously unserved
- Improved travel options to Chapel Hill High School giving students more flexibility
- Regional benefits of reduced auto emissions and reduced reliance on the single occupancy vehicle

### Projected Ridership

Chapel Hill Transit projects that the expanded HS route will generate 544 daily rides – 138,720 annually. The current HS Route service provides about 200 daily rides. The vast majority of these riders are traveling to Chapel Hill High School. It is estimated that 150 of the new daily riders will be from the Roger's Road neighborhood. Ridership will be primarily low income workers targeted by the JARC program. Chapel Hill Transit estimates that as many as 90% of the Rogers Road riders will be low income workers.

The expansion of service will provide transit options to new markets of Rogers Road residents, campus oriented work trips and midday needs to travel on the HS Route.

Currently, the Chapel Hill Transit system average passengers per hour is 47.8 passengers per hour. Performance on routes with frequency levels similar to the HS Route, such as the V, A, G and N are approximately 32 passengers per hour.

It is anticipated that the HS Route will maintain a similar performance level. Assuming productivity of 32 passengers per hour, the HS Route should generate 544 daily riders or 138,720 annual riders.

It is projected that the cost per ride will be \$1.22.

### **Implementation Plan**

Chapel Hill Transit is the public transit provider for the towns of Chapel Hill, Carrboro and the University of North Carolina. Chapel Hill Transit has the responsibility to provide public transit service throughout the jurisdictions of Carrboro and Chapel Hill. The extension of service and the operation of fixed route service falls within the normal activities of the transit agency.

The development and implementation of this project will be coordinated by existing Chapel Hill Transit staff.

Henry DePietro – Operations Manager.

Responsibility: oversight of operators, planning and daily route operation

Mr. DePietro has over nine years experience in transit operations.

Nick Pittman – Scheduling Coordinator

Responsibility: Schedule building and production of public information materials

Mr. Pittman has 7 years experience in transit operations.

The project will not require the purchase of additional capital equipment, but will require an estimated addition of thirteen hours of service daily.

Staff has selected introduction of service to the Rogers Road community as a key budget priority for 2008/2009. In anticipation, an implementation plan has been developed. As an initial step, Chapel Hill Transit staff has analyzed demographic data for this area and sought public input from residents of the Rogers Road community. In addition, discussions have been held with the Chapel Hill Town Council and the Carrboro Board of Alderman soliciting their support for the project.

It is anticipated that the following schedule would be followed for the development and implementation of services.

Spring 2008 – Service planning and public meetings

May 2008 – Develop new HS Route schedules

July 2008 – Provide marketing/schedule information distributed throughout the community

August 21, 2008 – Begin operation of the Rogers Road transit service

### **Project Budget** (additional detail see Part III Project Budget)

The expansion of the HS Route would extend service north of Homestead Road on Rogers Road and introduce midday service throughout the route.

### **Current Operation**

Currently, the HS Route operates for 2 hours in the morning and afternoon peak providing 4.1 daily hours of revenue service (see attachment 4).

Operating Statistics – Current HS Route

4.1 daily revenue hours	\$15.51 hourly labor & benefits cost
75.8 daily revenue miles	\$1.81 maintenance & consumable cost/mile

Operating Costs	Annual Cost
4.1 hours X \$15.51= \$63.59 X 235	\$16,215
75.8 miles X 1.81 per mile= \$137.20 X 255	<u>\$34,984</u>
	\$51,201 Annual Cost
	Current HS Route

Expansion Operating Costs

Expanded service on the HS Route would extend service to Rogers Road and introduce midday service.

Operating Statistics (expansion only)

New daily operating hours	13	\$15.51 hourly labor & benefits cost
New daily operating miles	227	\$1.81 maintenance & consumable cost/mile

Operating Costs

13 hours X \$15.51= \$201.63 X 225	Annual Cost
227 miles X \$1.81= \$410.87 X 225	\$51,415
	<u>\$104,771</u>
Annual Operating Cost	\$156,186

Marketing Cost

Schedule design layout printing	
25,000 at \$.25 each	\$6,250
Direct mail/public outreach	
10,000 households at \$.75	<u>\$7,500</u>
	\$13,750
 Total Project Cost	 \$169,936

Efforts to Ensure Cost Effectiveness

Project effectiveness will be measured and evaluated by utilizing several system performance indicators including:

- Total Ridership
- Passengers per hour
- Cost per passenger

Service quality will also be monitored utilizing the following:

- Customer satisfaction surveys

Route performance activities will be monitored monthly. Performance standards for passengers per hour and cost per passenger require that each route meet or exceed 50% of the system average.

Performance of the HS Route will be compared to similar routes in the system. Automated passenger counters will enable staff to evaluate the service on a trip by trip basis. If route performance falls below the system standard, trip specific modifications can be made to improve performance.

### **Coordination and Program Outreach**

Chapel Hill Transit will coordinate the provision of service with other transportation providers and social service agencies. The only other transportation provider in the area is Orange County Public Transit which provides service to elderly and disabled persons throughout rural Orange County. There are some trips provided by Orange County to clients who reside in the Rogers Road area. Chapel Hill Transit and Orange County will coordinate transportation to ensure that residents of the area have the maximum number of travel options afforded them.

Chapel Hill Transit will also coordinate with Orange County Aging and the Seymour Center. The Seymour Center is a facility located on Homestead Road that serves the elderly population. Chapel Hill Transit will work with the Seymour Center to identify transportation needs for persons living in the Rogers Road area traveling to the Seymour Center. Chapel Hill Transit will deviate midday trips in response to demand to ensure residents of the area are able to access this valuable social service.

Chapel Hill Transit will also work with area social service agencies working with low income populations to make them aware of the service and potential job opportunities. Chapel Hill Transit coordinates its services through the EZ Rider Advisory Committee. This committee will be made aware of service improvements and efforts to identify disabled persons who live in the Rogers Road neighborhood. Chapel Hill Transit will then work with the EZ Rider Advisory Committee and Disabilities Awareness Council to introduce travel training to disabled residents in order that they may take advantage of this service. Travel training will be conducted by current Chapel Hill Transit customer service staff to support this project.

Chapel Hill Transit will actively market the project. Public awareness of a general nature will be provided through media and news releases regarding the extension of service. Specific efforts will be made to reach target markets. Direct mail and door to door campaigns will provide schedules and maps for all residents affected by the project. Chapel Hill Transit will work with UNC to identify University students that will travel to Chapel Hill High School, Middle School and Elementary Schools for student teaching and volunteer work. Chapel Hill Transit will make educational and volunteer programs at the University aware of the fact that there is now transit access for these students.

### **Program Effectiveness and Performance Indicators**

Chapel Hill Transit utilizes a number of performance indicators that help measure and ensure program effectiveness. The indicators that will be applied to evaluation of this service will include an analysis of the following:

- total riders
- riders per mile

- riders per hour
- cost per mile
- cost per hour

Chapel Hill Transit currently has a standard that all services operated must meet at least 50% of the system average in order to be viable. The system averages for passengers per mile, passengers per hour and cost per hour are shown below.

Measure	System Average
Passengers per mile	<u>3.2</u>
Passengers per hour	<u>40.0</u>
Cost per mile	<u>5.3</u>
Cost per hour	<u>66.0</u>

The performance measures will be analyzed on a monthly basis, if standards are not met necessary changes may be made to the routing and scheduling to improve effectiveness. Ridership data will be gathered through the use of Automated Passenger Counters that are installed on approximately one third of the Chapel Hill Transit fleet.

### **Innovations**

There following are transit innovations being employed as part of this project:

Route Deviation will be used to extend service from the Rogers Road community to the Seymour Center which is about one mile from the established route. Route deviation will provide access to the Center for residents but not increase operating cost.

Travel Training will be used to educate disabled residents of the Rogers Road community about how to use fixed route transit. Access to fixed route service will provide improved mobility for the disabled and be more cost effective for the system by providing fewer demand response trips.

# PART III - PROJECT BUDGET

## Project Funding

Local matching funds will be required for all application submittals. For projects requiring operating funds, the required match is 50%+ from non-federal transportation funds. For capital projects the required match is 20%+ from non-federal transportation funds.

Please include a certified financial statement from an accountant or bank.

Total Annual Project Budget \$169,936 (operating and capital only)

Capital Federal Share	\$0	_____%
Capital Local Match	\$0	_____%
Operating Federal Share	\$84,968	50%
Operating Local Match	\$84,968	50% Total

Local Match Funding Source: Funding will be included in the Chapel Hill Transit FY 2008/09 operating budget.

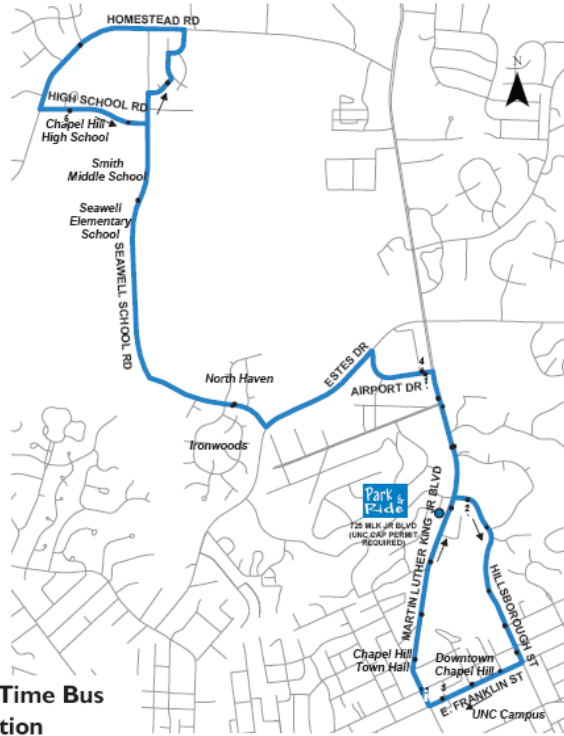
Note: The applicant is required to demonstrate a commitment to providing local match funds. This can be in the form of a letter and/or a copy of an existing grant agreement or supporting documentation where funds will be drawn from. Financial information must be certified by an accountant or financial institution.

Will there be a commitment of funds beyond the grant period?  Yes  No

/Describe: Continued funding for the expanded HS Route will be included in the FY 2009/10 operating budget. The level of service and service hours on the HS Route could be modified to assure the best quality of service and that operations meet performance standards.

# HS Route - High School / Airport Dr. at MLK Jr. Blvd / Downtown

Weekday Schedule  
Year Round



 = Stop with Real-Time Bus Arrival Information

Southbound			Northbound		Southbound	
Airport Dr at MLK Jr Blvd	Hillsborough St at MLK Jr Blvd	E Franklin St at Varsity Theatre	Airport Dr at MLK Jr Blvd	Chapel Hill High School	Chapel Hill High School	Airport Dr at MLK Jr Blvd
①	②	③	④	⑤	⑤	①
7:05	7:10	7:15	7:21	7:28	7:30	7:35
7:35	7:40	7:45	7:51	7:58	8:00	8:05
8:05	8:10	8:15	8:21	8:28	8:30	8:35
8:35	8:40	8:45	8:51	8:58	9:00	9:05
SERVICE BREAK						
4:05	4:10	4:15	3:51	3:58	4:00	4:05
4:35	4:40	4:45	4:21	4:28	4:30	4:35
5:05	5:10	5:15	4:51	4:58	5:00	5:05
5:35	5:40	5:45	5:21	5:28	5:30	5:36

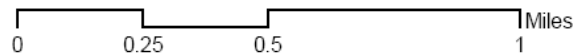
HS Weekday 19

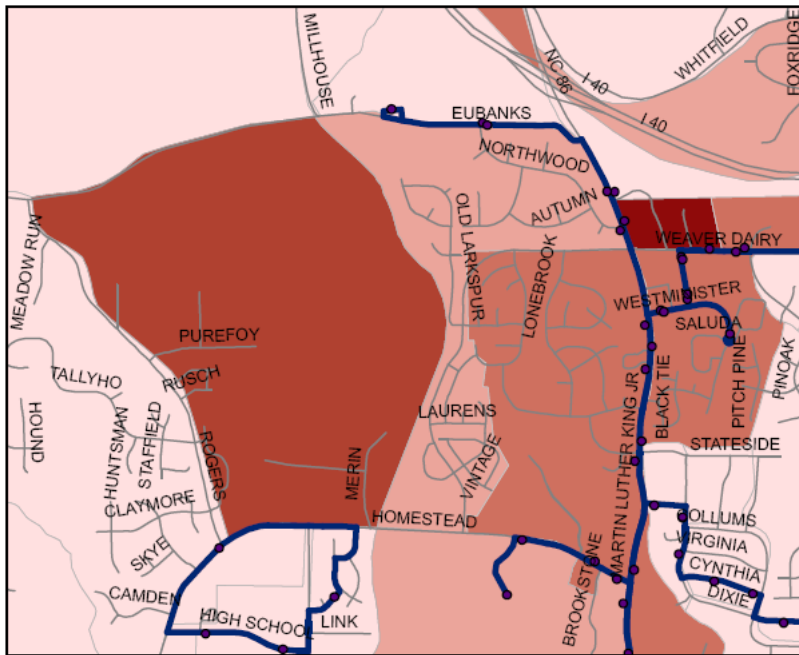
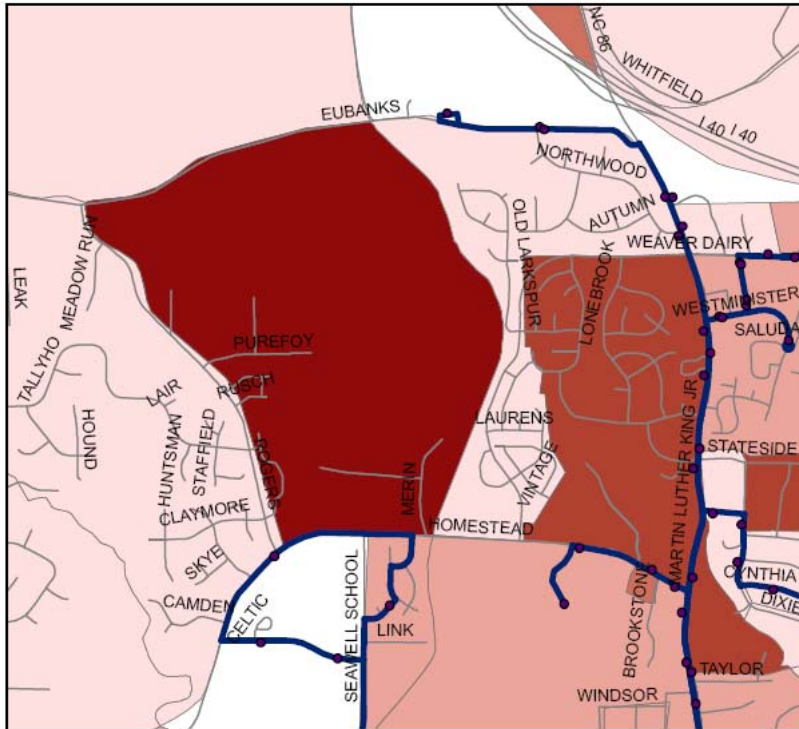
## Rogers Rd. Demographic Information By Block

	Census Blocks		
	1000	1001	1037
Total Population	232	779	50
White alone	93	698	50
Black or African American alone	138	40	0
Asian alone	1	27	0
Other		14	0
Hispanic/Latino	8	15	0
Households	91	246	13
Average household size	2.55	3.17	3.85
Total Housing Units	106	250	13
Occupied	91	246	13
Vacant	15	4	0
Owner occupied	63	230	13
Renter occupied	28	16	0

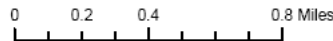


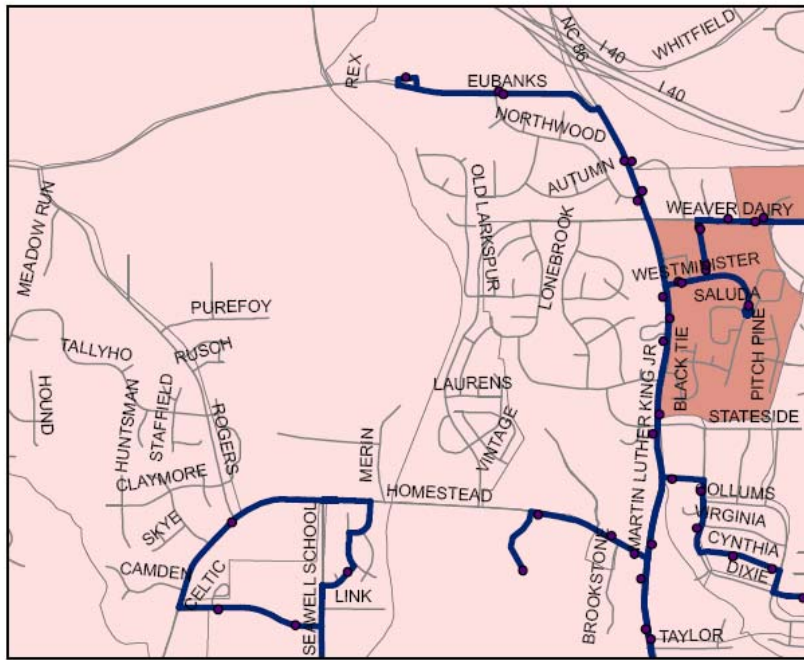
2008 February  
 Sources: 2000 U.S. Census  
 Prepared by Chapel Hill Planning Department



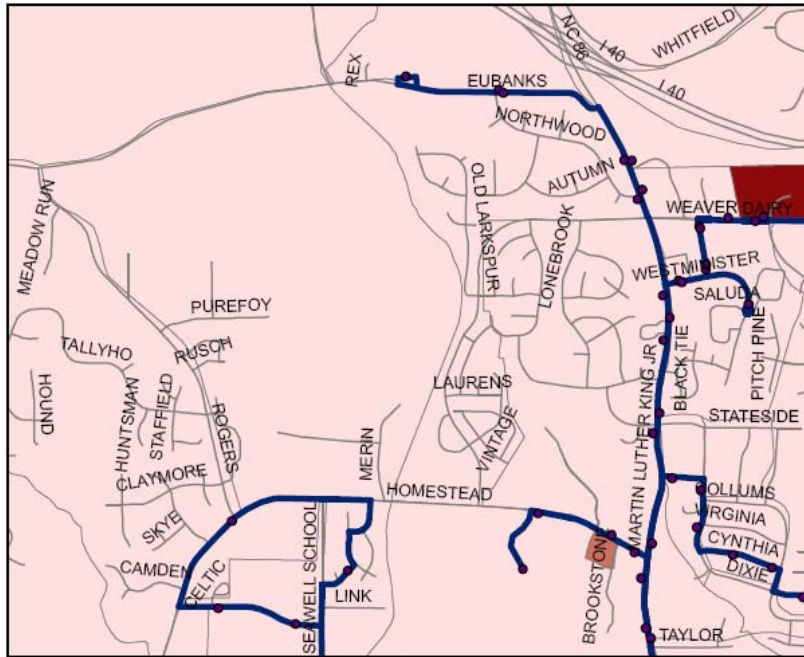


2008 February  
 Sources: Chapel Hill Transit & 2000 U.S. Census



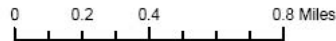


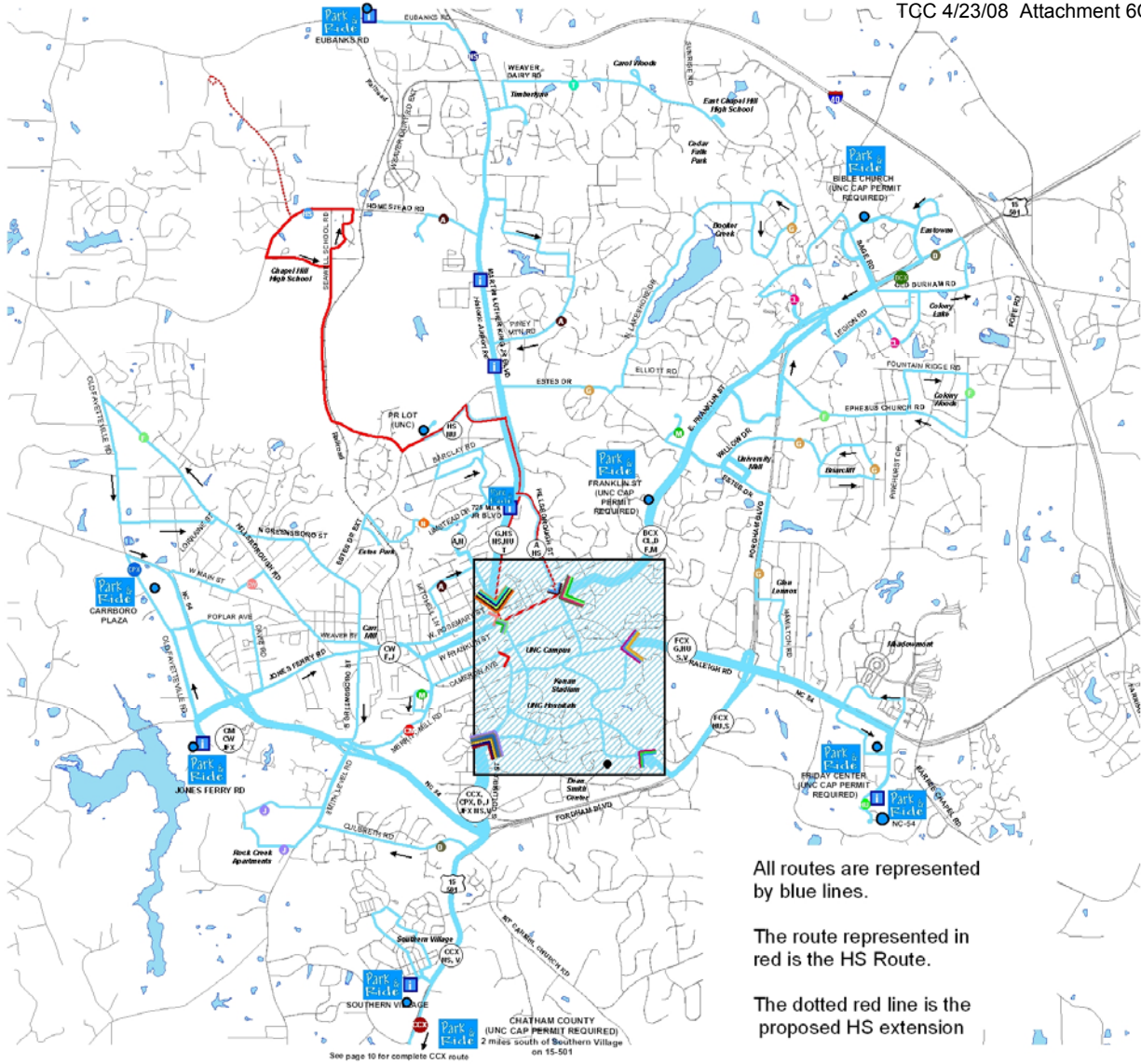
- Bus Stop
- Weekday Bus Route
- Streets



- (Lightest Red) 0 - 3%
- (Light Red) 4 - 5%
- (Dark Red) 6 - 8%
- (Darkest Red) 9 - 12%
- (Very Dark Red) 13 - 100%

2008 February  
 Sources: Chapel Hill Transit & 2000 U.S. Census



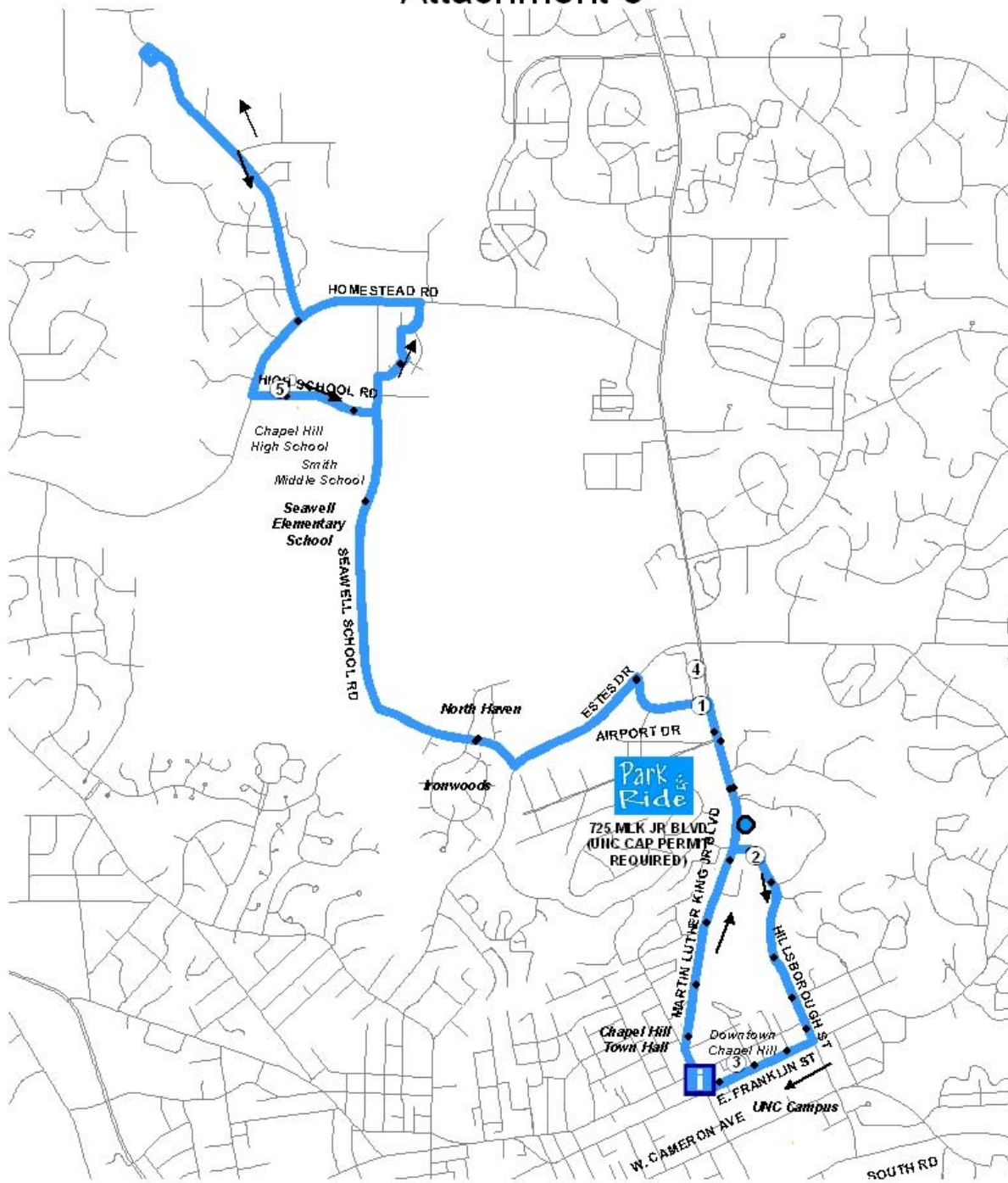


All routes are represented by blue lines.

The route represented in red is the HS Route.

The dotted red line is the proposed HS extension

# HS Route Proposed Service Attachment 6





**TOWN OF CARRBORO**

NORTH CAROLINA

WWW.TOWNOFCARRBORO.ORG

February 20, 2008

Steve Spade, Director  
Chapel Hill Transit  
6900 Millhouse Road  
Chapel Hill, NC 27516

Dear Mr. Spade,

I am writing on behalf of the Town of Carrboro to support the Chapel Hill Transit application of Job Access Reverse Commute funding. The project being requested in this grant is the extension of the HS route to serve the Rogers Road community.

A portion of the persons who live on Rogers Road are residents of Carrboro. This is a community of lower income citizens who have for the past several years requested the introduction of bus service to the area. This is a high priority for the Town of Carrboro and if this grant is approved, Carrboro will share in a portion of the local match.

The extension of service to the Rogers Road community will improve access to jobs, education, medical and recreational opportunities offered throughout our community. Thank you for your efforts to help provide this service.

Sincerely,

Steve Stewart, Town Manager  
Carrboro, NC

February 29, 2008

Dear Madam or Sir:

Chapel Hill Transit is submitting an application for Job Access Reverse Commute funds to extend service to the Rogers Road neighborhood. The residents of Rogers Road, who are lower income citizens, have consistently expressed the need for transit services to the Chapel Hill Town Council.

Job Access Reverse Commute funds are critical to the Town because these funds would enable us to provide such Transit services to members of the Roger's Road neighborhood. Chapel Hill takes pride in its commitment in providing transportation options for individuals in our community and the addition of the Job Access Reverse Commute funds would enable us to extend this option to those in the Rogers Road neighborhood.

This application has my full support and commitment to work with the Town Manager, Roger Stancil, and staff to make this project a success.

Thank you for your consideration of this application. Please feel free to contact Stephen Spade, Transit Director at (919) 969- 4900, or the Mayor's Office at (919) 968-2714 if you have comments or questions.

Kevin C. Foy  
Mayor

**February 29, 2008**

MEMORANDUM TO: Felix Nwoko, TSP Manager  
101 City Hall Plaza  
Durham, NC 27701

FROM: Steve Mancuso, Transit Administrator  
Durham Area Transit Authority  
1907 Fay Street  
Durham, NC 27701

Subject: APPLICATION FOR JARC FUNDING FOR SERVICE EXPANSION  
TO NEW HOPE COMMONS AT NIGHT, SUNDAYS AND  
HOLIDAYS

I am pleased to submit this application on behalf of the Durham Area Transit Authority (DATA) for Job Access Reverse Commute (JARC) funding to enable the transit system to provide night, Sunday and holiday service to New Hope Commons on route 10. The total cost of the service is \$145,986. DATA is asking for \$72,993 (50%) in JARC funding assistance. If approved, DATA would amend route 10 service operation in July of 2008. The balance of \$72,993 is expected to be requested from City Council.

The attached proposal is in response to the announcement from DCHC-MPO calling for transportation projects in the region to be funded using FY 09 Job Access Reverse Commute (JARC) funds. This proposal has been prepared following the guidelines set forth in the project announcement.

The Durham Area Transit Authority would be very grateful if this funding request us approved.

Any issues/questions related to this application should be directed to me (x209) or to Pierre Owusu at (x214) (919) 560-1535.

Attachments

DURHAM AREA TRANSIT AUTHORITY  
JOB ACCESS /REVERSE COMMUTE (JARC)  
APPLICATION FOR FUNDING

PART 1 - TRANSMITTAL

APPLICANT DATA

Transit System:	Durham Area Transit Authority
Contact Person:	Pierre Osei-Owusu
Address:	1907 Fay Street, Durham NC 27704
Telephone:	919-560-1535
Fax:	919- 560-1534
E-mail:	Pierre.osei-owusu@durhamnc.gov

**Project Description**

**TITLE** Weeknights, Sunday and Holiday Service to New Hope Commons

**BRIEF DESCRIPTION** DATA is requesting funding to operate expanded route 10 evening services. The hours of service would be extended from 6:pm. to 12 am. The proposed extended hours of service will meet the needs of passengers, employees and employers at New Hope Commons.

**FUNDING PROGRAM:** JARC  X  New Freedom \_\_\_\_\_

**PROJECT TYPE** Capital Only \_\_\_\_\_ Capital and Operating \_\_\_\_\_

Operating Only  X  Mobility Management/Coordinated Planning \_\_\_\_\_

**SERVICE DAYS/HOURS**

306 Weekdays and Saturdays x 5.25 hours per weekday and Saturday = 1,606.5 hours per year. 58 Sundays x 12.25 hours per Sunday= 710.5 hours per year

Total hours per year of extended service is = 2,317

**ESTIMATED COST PER ONE WAY TRIP** \$1.00 per one-way rider trip

**ESTIMATED DAILY RIDERS** 47 (weekday)

## **PART 1 FUNDING REQUEST**

### **Project Overview**

The Durham Area Transit Authority is pleased to submit this application in response to the DCHC-MPO's recent request for projects to be funded using Job Access Reverse Commute (JARC) funds. This proposal is to obtain JARC funds to enable DATA to provide night service to help improve current night service to several patrons. Currently, New Hope Commons is not served at night, Sundays, and holidays. The cost of the service is \$145,986 and DATA is requesting **\$72,993 (50%)** in JARC assistance for the implementation of the service. The balance of \$72,993 will be requested from City Council.

### **Background**

The Durham Chapel Hill Carrboro Metropolitan Planning Organization (DCHC-MPO) recently announced solicitation of proposals for funding under the Job Access and Reverse Commute (JARC) program. DCHC-MPO is the regional organization responsible for transportation planning for the western part of the Research Triangle area in North Carolina. DATA operates fixed route service within a portion of the DCHC jurisdiction. JARC funds provide financial assistance to improve mobility and economic opportunities through a local/regional collaborative transportation planning process. A Job Access project provides transportation services that, among other things, are designed to transport welfare recipients and other low-income individuals to jobs and job-related activities. A significant number of patrons of the DATA system are considered low income and are currently provided fixed route services that qualify for JARC funding.

According to a customer survey conducted by DATA in 2006, approximately 72% of DATA's customers earn less than \$20,000 a year. Therefore, a significant number of patrons of the DATA bus system are considered low income and qualify for transit service as outlined by the JARC grant.

## **PART II PROJECT NARRATIVE**

### **Night Service Improvement to New Hope Commons on Route # 10**

A number of complaints have been made by bus riders about the # 10 bus not serving New Hope Commons at night, and on Sundays and Holidays. The Service Planning and Efficiency Committee (SPEC) and DATA's PRIDE Ambassadors examined the complaint and evaluated the night, Sunday and Holiday service on the route at the affected areas. After an extensive boarding and alighting count around the named corridor staff has determined from the survey results that there would be sufficient ridership to New Hope Commons to merit service at night and on Sundays and Holidays.

For the past two-years staff has tried to have this problem resolved as part of the overall annual budget. Unfortunately, the City's budget has not been able to accommodate this request therefore staff is using this JARC funding opportunity to look for other means of

paying for the expanded service to help passengers with their job access commute needs related to the route. This service request has gone all the way to the Durham City Council.

### **Project Goals and Objectives**

The goal of the project is to provide more opportunities for workers who use DATA. DATA provides on average over 14,000 passengers trips daily. The service improvement project is consistent with the goals of JARC in regards to being able to offer transportation needs to low-income workers with nontraditional work schedules.

Objectives:

- Provide job access opportunities for low income residents in Durham to work in the New Hope Commons area
- Provide enhanced job access opportunity for low income and Latino residents along Garrett Road, who have been requesting for this service for the past two years
- Encourage people to use buses and thus reduce the single occupancy vehicle use

### **Estimation of Additional Passengers**

It is estimated, based on the average passenger/trip (28) system-wide, that this project will provide approximately 9 passengers per hour or **20,963** additional passengers annually. Calculation of the estimates is shown below:

9 pass/hr x 5.25 rev hr per weekday = 47.25 additional passengers per weekday x 254 weekdays = **12,001** annually, + 9 pass/hr x 5.25 rev hr per Sat = 47.25 additional passengers per Saturday x 52 Saturdays = **2,457** passengers annually, + 9 pass/hr x 12.25 rev hr per Sunday = 110.25 additional passenger per Sunday x 59 Sundays & Holidays = **6505** passenger annually). Total additional passengers from the service =

### **Implementation Plan**

The timeline for the implementation of the project will depend upon the award of the funds. However, this request is for FY2009 that begins on July 1, 2008. It is anticipated that the service change would begin no later than 30 days after the award of the funds. This would allow the planning staff would work with the Public Affairs Specialist to provide notice to passengers and to make changes to printed media regarding night service and also educate riders about the service change.

The actual implementation plan will include an announcement of the award of the funding to the target groups including an implementation timeline as noted below:

- July 2008-Internal review of the route amendment process
- July-2008 Schedule design and dissemination and review by all stakeholders

- August 2008 – final draft schedule plan goes to DATA Board for approval
- August 2008- announcement of service start date to all stakeholders including bus riders, Latino community, and merchants at New Hope Commons.
- September/October 2008-service begins

### **Program Outreach/Marketing**

In working with the PRIDE (People Ride in Durham Everyday) Ambassadors and the SPEC (Service Planning and Efficiency Committee), DATA has received input from both the community and operators of the system. Passengers have expressed their concerns about the absence of night service to New Hope Commons making it difficult for low income workers to work at this retail outlet. Also DATA will work with the Triangle Transit Authority, DATA ACCESS, and WORK FIRST program coordinators of the Durham County, to reach out to many potential clients who would need the service.

Listed below are program outreach strategies:

- Assess the transportation requirements of WORK FIRST program participants and identify transportation-related barriers to obtaining and retaining work at the retail outfit;
- Identify strategies to increase availability, affordability and effectiveness of extended transportation service;
- Establish agreements among the transportation providers, employers and the Social Services Agency (SSA) to ensure the availability of this transportation options;
- Step up outreach programs to the Latinos and other low income communities in the Garrett Road area to publicize the service;
- Include announcements on buses, brochures and flyers to major buses in the New Hope Common Area

### **Demographic Profile of the Service Area**

The target population for the service consists largely of Latinos who live along Route # 10 in the Garrett Road area, and work at New Hopes Commons. Many of these residents qualify as low income residents. Please refer to the attached Map based for the demographic profile of the service area, based on 2000 Census Tracts for Durham.

### **Program Effectiveness/Evaluation**

Transportation is clearly a key barrier to those moving from welfare to work. Providing a variety of affordable or expended transportation options for low-income workers, especially those who receive welfare benefits will increase the likelihood that those workers will get and retain jobs. This is a critical objective of DATA.

There is no doubt that this service extension would benefit a number of low income clients. This is because a number of citizens have taken the matter to the Durham City Council requesting for extended service to the named place in order to enable them hold on to jobs in the New Hope Commons shopping center.

DATA is working with a number of community organizations to improve access to jobs and to fill gaps in the region's employment-related transportation services. This initiative is increasing collaboration between DATA and local stakeholders. The program offers transportation to job opportunities beyond the reach of many workers, especially those making the transition from public assistance to jobs and economic self-sufficiency.

### **Program Evaluation**

The proposed service will be evaluated based on ridership per hour. The expectation is that the service will perform at a minimum 30% in passenger ridership compared to the systems average ridership for the first year. This is the standard set by the DATA Board for all new routes. Currently the average ridership (system-wide) =28 passengers per hour. Therefore it is anticipated that the additional service would generate a minimum of 9 passengers per hours to guarantee continued provision of the service. DATA will monitor the route and the service performance and take appropriate measures established by the DATA Board to ensure that the service meets the minimum required productivity measure.

### **Part III. PROPOSED PROJECT BUDGET**

The total cost of the service is \$145,986. DATA is requesting \$72,993 (50%) in JARC assistance to help cover the cost of the service. DATA plans to make a formal request for the remaining balance from City Council once the JARC portion is approved. Also, for subsequent years, DATA hopes to include the entire amount as part of its annual budget.

**Current and Future (JARC funded) Route 10 Weeknights, Saturday Nights and Sunday Schedule**

**Current Route  
10 (Weekday)**

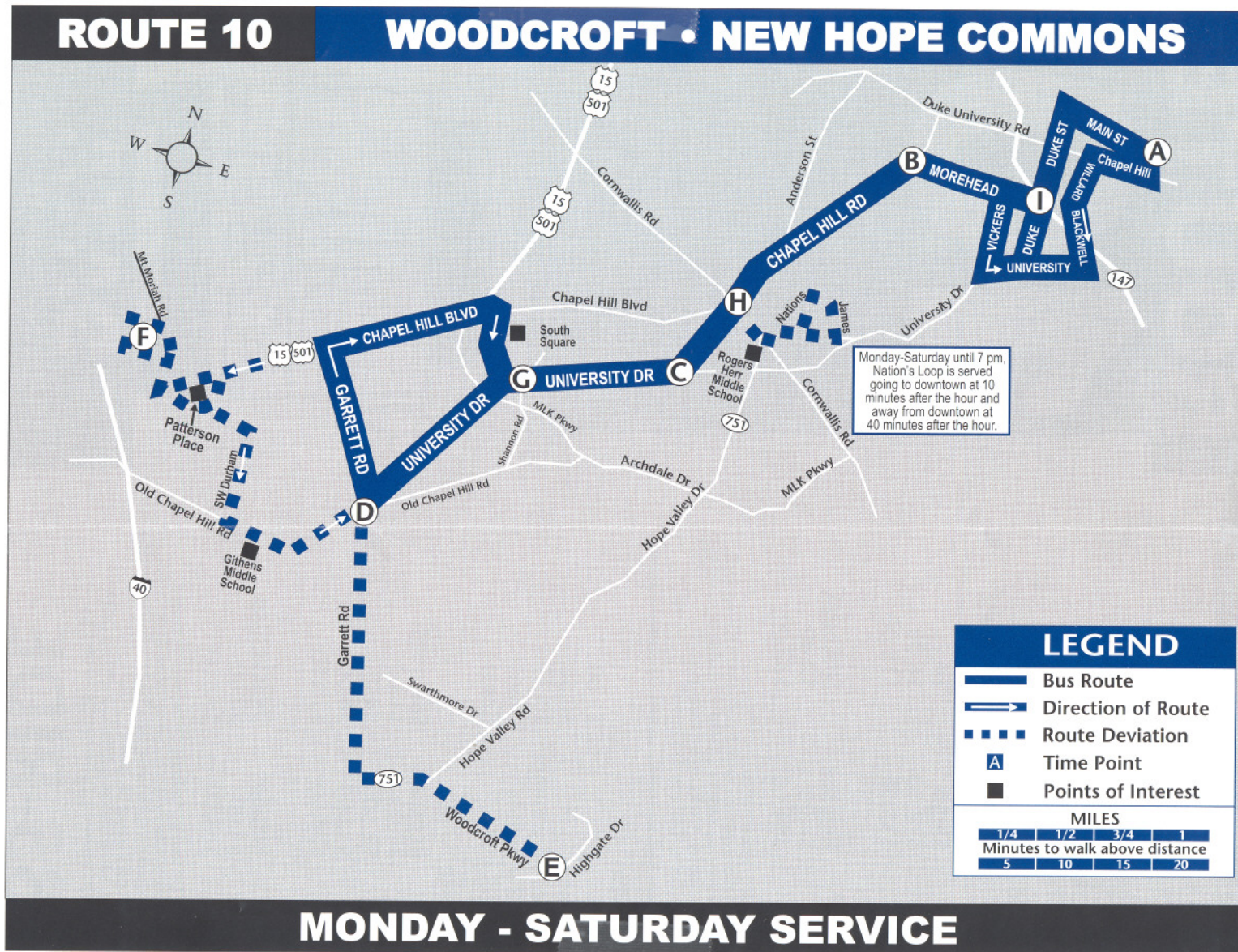
Downtown Terminal	Morehead & Chapel Hill Rd	Chapel Hill Rd & University	Old Chapel Hill & Garrett	Woodcroft & Highgate	New Hope Commons	University & Shannon	Chapel Hill Rd & Cornwallis	Duke St & Morehead	Downtown Terminal
—	—	—	—	—	5:15	5:30	5:40	5:50	5:55
—	—	—	—	5:45	—	6:00	6:10	6:20	6:25
—	—	—	—	—	6:15	6:30	6:40	6:50	6:55
6:00	6:10	6:20	6:30	6:45	—	7:00	7:10	7:20	7:25
6:30	6:40	6:50	7:00	—	7:15	7:30	7:40	7:50	7:55
7:00	7:10	7:20	7:30	7:45	—	8:00	8:10	8:20	8:25
7:30	7:40	7:50	8:00	—	8:15	8:30	8:40	8:50	8:55
8:00	8:10	8:20	8:30	8:45	—	9:00	9:10	9:20	9:25
8:30	8:40	8:50	9:00	—	9:15	9:30	9:40	9:50	9:55
9:00	9:10	9:20	9:30	9:45	—	10:00	10:10	10:20	10:25
9:30	9:40	9:50	10:00	—	10:15	10:30	10:40	10:50	10:55
10:00	10:10	10:20	10:30	10:45	—	11:00	11:10	11:20	11:25
10:30	10:40	10:50	11:00	—	11:15	11:30	11:40	11:50	11:55
11:00	11:10	11:20	11:30	11:45	—	12:00	12:10	12:20	12:25
11:30	11:40	11:50	12:00	—	12:15	12:30	12:40	12:50	12:55
12:00	12:10	12:20	12:30	12:45	—	1:00	1:10	1:20	1:25
12:30	12:40	12:50	1:00	—	1:15	1:30	1:40	1:50	1:55
1:00	1:10	1:20	1:30	1:45	—	2:00	2:10	2:20	2:25

1:30	1:40	1:50	2:00	—	2:15	2:30	2:40	2:50	2:55
2:00	2:10	2:20	2:30	2:45	—	3:00	3:10	3:20	3:25
2:30	2:40	2:50	3:00	—	3:15	3:30	3:40	3:50	3:55
3:00	3:10	3:20	3:30	3:45	—	4:00	4:10	4:20	4:25
3:30	3:40	3:50	4:00	—	4:15	4:30	4:40	4:50	4:55
4:00	4:10	4:20	4:30	4:45	—	5:00	5:10	5:20	5:25
4:30	4:40	4:50	5:00	—	5:15	5:30	5:40	5:50	5:55
5:00	5:10	5:20	5:30	5:45	—	6:00	6:10	6:20	6:25
5:30	5:40	5:50	6:00	—	6:15	6:30	6:40	6:50	6:55
6:00	6:10	6:20	6:30	6:45	—	—	—	—	—
6:30	6:40	6:50	7:00	—	7:15	—	—	—	—

**JARC FUNDED WEEKNIGHTS, SAT NIGHT AND SUNDAY SERVICE**

7:00	7:10	7:20	7:30	7:45	8:00	8:30	8:40	8:50	7:55
8:00	8:10	8:20	8:30	8:45	9:00	9:30	9:40	9:50	8:55
9:00	9:10	9:20	9:30	9:45	10:00	10:30	10:40	10:50	9:55
10:00	10:10	10:20	10:30	10:45	11:00	11:30	11:40	11:50	10:55
11:00	11:10	11:20	11:30	11:45	12:00	12:30	--	--	11:55
12:00	12:10	12:20	12:30	—	—	—	—	—	—

Note: Currently, there is one bus running hourly headway and 60 minutes roundtrip time. With JARC funding, the service will increase to two buses each running 120 minutes roundtrip on hourly headway. Sunday and Holiday Schedule will involve the same two buses operating from 7:00 a.m. until 7: p.m.





**February 29, 2008**

MEMORANDUM TO: Felix Nwoko, TSP Manager  
101 City Hall Plaza  
Durham, NC 27701

FROM: Pierre Osei-Owusu  
Durham Area Transit Authority  
1907 Fay Street  
Durham, NC 27701

Subject: APPLICATION FOR JARC FUNDING TO EXTEND SERVICE ON  
ROUTE 12B TO SILVERLINE WINDOWS COMPANY AT 2223  
NORTHEAST CREEK PARKWAY

I am pleased to submit this application on behalf of the Durham Area Transit Authority (DATA) for Job Access Reverse Commute (JARC) funding to enable the transit system to expand service on route 12B. The cost for the expanded service is \$73,835. DATA is asking for \$36,918 (50%) in JARC funding assistance. If approved, DATA will amend route 12B and begin the service by September of 2008. The balance of \$36,918 (50%) local match is expected to be requested from the Durham City Council.

The attached proposal is in response to the recent announcement from DCHC-MPO calling for transportation projects in the region to be funded using FY 09 Job Access Reverse Commute (JARC) funds. This proposal has been prepared following the guidelines set forth in the project announcement.

The Durham Area Transit Authority will be very grateful if this funding request is approved.

Any issues/questions related to this application should be directed to me (x209) or to Pierre Owusu at (x214) (919) 560-1535.

**PART 1 - TRANSMITTAL  
APPLICANT'S INFORMATION**

Transit System:	Durham Area Transit Authority
Contact Person:	Pierre Osei-Owusu
Address:	1907 Fay Street, Durham NC 27704
Telephone:	919-560-1535
Fax:	919- 560-1534
E-mail:	Pierre.osei-owusu@durhamnc.gov

**Project Description**

**TITLE** Weekday Service expansion to SilverLine Windows Company

**BRIEF DESCRIPTION** DATA is requesting funding to operate expanded service on route 12B to SilverLine Windows Company located at 2223 Northeast Creek Parkway, near Cornwallis and S. Alston Avenue. The service expansion will be three trips per day, Monday-Friday and 3 trips on Saturdays. The proposed service will meet the needs of Durham residents, and low income employees of SilverLine Windows Company. The Company has agreed to purchase 20 monthly passes to offer as free passes to 20 employees of the company to guarantee the service.

**FUNDING PROGRAM:** JARC  X  New Freedom \_\_\_\_\_

**PROJECT TYPE** Capital Only \_\_\_\_\_ Capital and Operating \_\_\_\_\_

Operating Only  X  Mobility Management/Coordinated Planning \_\_\_\_\_

**SERVICE DAYS/HOURS**

254 Weekdays x 3 hours + 3hours x 52 Saturdays = 918 hours per year.

**ESTIMATED COST PER ONE WAY TRIP** =\$1.00 per one-way rider trip

**ESTIMATED NEW YEARLY RIDERS 25,000**

**PART 1 FUNDING REQUEST**

**Project Overview**

The Durham Area Transit Authority is pleased to submit this application in response to the DCHC-MPO's recent request for projects to be funded using Job Access Reverse Commute (JARC) funds. This proposal is to obtain JARC funds to enable DATA to expand service hours on the route for current patrons and also to provide transportation opportunity for employees at SilverLine Windows, located at 2223 Northeast Creek Parkway, as part of an amended route 12B. Currently, DATA offers only 5 hours of service on route 12B, and there is no service on Northeast Creek Parkway. By this request DATA will increase the service on this route from 5 hours to 8 hours during the weekday and additional 3 hours of new service on Saturdays at a cost of \$73,835 to enable the route 12B to deviate to SilverLine Windows Company. DATA is requesting \$36,918 (50%) in JARC assistance for the implementation of the service. The balance of \$36,918 (50%) will be requested from City Council.

## **PART II PROJECT NARRATIVE**

### **Program Overview**

The Durham Chapel Hill Carrboro Metropolitan Planning Organization (DCHC-MPO) recently announced solicitation of grant proposals for funding under the Job Access and Reverse Commute (JARC) program. DCHC-MPO is the regional organization responsible for transportation planning for the western part of the Research Triangle area in North Carolina. DATA operates fixed route service within a portion of the DCHC jurisdiction. JARC funds provide financial assistance to improve mobility and economic opportunities through a local/regional collaborative transportation planning process. A Job Access project provides transportation services that, among other things, are designed to transport welfare recipients and other low-income individuals to jobs and job related activities. A significant number of patrons of the DATA system are considered low income and are currently provided fixed route services that qualify for JARC funding.

According to a customer survey conducted by DATA in 2006, approximately 72% of DATA's customers earn less than \$20,000 a year. Therefore, a significant number of patrons of the DATA bus system are considered low income and qualify transit service as outline by the JARC grant.

Also, the City of Durham's Office of Economic and Workforce Development contacted DATA in December 2007 in regards to providing public transportation to SliverLine Windows Inc. located on Northeast Creek Parkway.

Unfortunately, the City's budget has not been able to accommodate this request therefore staff is using this JARC funding opportunity to look for other means of funding to help passengers with their job access commute in the city.

This proposal is to obtain JARC funds to enable DATA to expand service hours on the route for current patrons and also to provide transportation opportunity for employees at SilverLine Windows, located on 2223 Northeast Creek Parkway, along an amended route 12B.

### **Project Needs/Goals and Objectives**

DATA at the present moment has limited and infrequent service on Route12B, does not serve the SilverLine Windows Company, and majority of the low income workers of this company, who are low income residents of the city of Durham, continue to call and complain about the inadequate service and their inability to find employment. Therefore, the goal of the project is to extend service on Route12B in order to address the transportation needs of these and other low income residents of Durham.

To achieve this goal, DATA has agreed to amend the current Route12B by adding a new segment to the route in order to serve employees of the SilverLine Windows Company,

located on Northeast Creek Parkway. The proposed service expansion is expected to add 40 guaranteed (paid) passenger trips daily to the service. SilverLine has agreed to assist its low-income workers transportation needs by purchasing 20 monthly passes for these employees. Additionally, the extended segment of the route is also expected to attract new patrons.

An additional goal of the project is to provide more opportunities for workers who use DATA to provide an easy commute to and from their work. DATA provides on average over 14,000 passengers trips daily, 70% of these trips are job-related. Therefore the overall objective of this project would be to increase the daily job-related passenger-trips

### **Ridership Estimation**

Current # of daily rev hrs = 5	Proposed # of daily rev hrs = 11 (5+6)
Current average passengers/hr =8	Proposed # of passengers based on
Current daily total ridership $5 * 8 = 40$ pass/day	$7+8 = 15$ pass/day
Currently yearly ridership $= 40 * 254 = 10,160$	Anticipated weekday ridership = $15 * 8 * 254 = 30,480$
	Anticipated Saturday ridership = $15 * 3 * 52 = 2,340$
	Yearly ridership expected = 35,160 annual passengers

Net passenger increase from the proposed service change =  $35,160 - 10,160 = 25,000$

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Other goals for the service initiative include:

- Modify existing bus routes and schedules to increase the frequency of service, add new destinations, and also provide connections to other services.
- Increase distribution of public transportation information to users, including trip-planning services.
- Provide job access opportunities to low income residents in Durham to work at new and emerging companies that are designed for low-income residents.
- Increase DATA's partnership with companies to expand and improve transportation opportunities to needy residents.
- Encourage people to use transit and thus reduce the single occupancy vehicle use.
- Eventually, and through partnerships, implement DATA's TransPass program and other transit benefit programs to employers and employees at SilverLine and similar employment outlets adjoining areas on the route.

## **Implementation Plan**

The timeline for the implementation of the project will depend upon the award of the funds. However, this request is for FY 2009 which begins on July 1, 2008. It is anticipated that the service change would begin no later than 30 days after the award of the funds including the additional matching funds. Once all funds have been secured the planning staff would work with the Public Affairs and Marketing unit at DATA to provide information to passengers, and to make changes to the printed media regarding the service change. Also public notices about the service change will go out several days before the actual service start date.

Another implementation process will include an announcement of the award of the funds to all stakeholders including SilverLine Company and plans for the start of the service. Specific timelines are noted below:

- July 2008-internal review of the route amendment process
- July 2008-schedule design and dissemination to all stakeholders
- August 2008- final draft plan goes before the DATA Board of Trustees
- August 2008- announcement of service start date to all stakeholders
- August 2008- final preparation including installation of passenger amenities along the route
- September/October 2008 -service begins

## **Program Outreach/Marketing**

DATA hopes to work with its PRIDE (People Ride in Durham Everyday) Ambassadors and the SPEC (Service Planning and Efficiency Committee), committees to market the service and also receive input from both the community and also from Silver Line on matters related to the service.

SilverLine currently has an excellent community partnership program for low-income employment through diversified hiring practices, utilizing the recruitment services of the Durham JobLink. Unfortunately, retention and recruiting efforts have suffered as a result of lack of public transportation to their facility. DATA hopes to meet the transportation need through this partnership.

Listed below are program outreach strategies:

- Assess the transportation requirements of JobLink program participants and identify transportation-related barriers to obtaining and retaining work elsewhere in the City;
- Identify strategies to increase availability, affordability and effectiveness of this and other transportation services provided by DATA;
- Establish agreements among the transportation providers, employers and the Social Services Agency (SSA) to ensure the availability of transportation options;

- Make periodic announcements on buses, prepare and distribute brochures and flyers about the service expansion.

**Program Effectiveness**

Transportation is clearly a key barrier to those moving from welfare to work. Providing a variety of affordable or expanded transportation options for low-income workers, especially those who have received welfare benefits will increase the likelihood that those workers will get and retain jobs. This is a critical objective of DATA.

Durham Area Transit Authority recognizes the strong need for a regional Job Access and Reverse Commute program in order to fill gaps where existing public transportation services cannot always transport low-income people and welfare recipients from their homes to entry-level jobs they would likely qualify.

**Program Effectiveness/Evaluation**

The effectiveness of the service will be evaluated based on the additional ridership that it generates. Based on the current service standards set by the DATA Board of Trustees, the expectation is that the service will, at the least, perform at 50% ridership level compared to the system average. Currently the system’s average ridership =28 passengers per hour. It is anticipated that ridership level will be at least14 passengers per hour to guarantee continued service on the route. DATA will monitor the route and the service performance and also work with SilverLine Windows Company to ensure that the agreed number of tickets paid for are not only purchased but used by the employees to guarantee continued service to the company. DATA will also contact businesses located along the North Creek Parkway to inform them about the service.

**Part III. PROPOSED PROJECT BUDGET**

The total cost of the service is \$73,835. DATA is requesting \$36,918 (50%) in JARC assistance to help cover the cost of the service. DATA plans to make a formal request for the remaining balance in the amount of \$36,918 (50%) from Durham City Council, once the JARC portion is approved. Also, for subsequent years, DATA hopes to include the entire amount as part of its annual budget.

**Schedule showing current Route 12B**

			Lowe's Grove			
Downtown Terminal	Hwy 55 & Cecil Rd.	Cornwallis & Hwy 55	Middle School	Cornwallis & Hwy 55	Hwy 55 & Cecil Rd.	Downtown Terminal
7:30	7:40	7:50	8:00	8:10	8:20	8:25
8:30	8:40	8:50	9:00	9:10	9:20	9:25
—	—	—	—	—	—	—
3:30	3:40	3:50	4:00	4:10	4:20	4:25
4:30	4:40	4:50	5:00	5:10	5:20	5:25

5:30      5:40      5:50      6:00      6:10      6:20      6:25

**Schedule Showing additional service to SilverLine Windows Company**

**MONDAY-FRIDAY**

Downtown Terminal	Hwy 55 & Cecil Rd.	Cornwallis & Hwy 55	Lowe's Grove Middle School	SilverLine Windows	SilverLine Windows	Cornwallis & Hwy 55	Hwy 55 & Cecil Rd.	Downtown Terminal
<b>*6:30</b>	<b>6:40</b>	<b>6:50</b>	---	<b>6:55</b>	<b>6:55</b>	<b>7:00</b>	<b>7:20</b>	<b>7:25</b>
7:30	7:40	7:50	8:00	--	--	8:10	8:20	8:25
8:30	8:40	8:50	9:00			9:10	9:20	9:25
<b>* 2:30</b>	<b>2:40</b>	<b>2:50</b>	—	<b>2:55</b>	<b>2:55</b>	<b>3:10</b>	<b>3:20</b>	<b>3:25</b>
3:30	3:40	3:50	4:00	--	--	4:10	4:20	4:25
4:30	4:40	4:50	5:00	--	--	5:10	5:20	5:25
5:30	5:40	5:50	6:00	--	--	6:10	6:20	6:25
<b>*6:30</b>	<b>6:40</b>	<b>6:50</b>	--	<b>6:55</b>	<b>7:05</b>	<b>7:10</b>	<b>7:20</b>	<b>7:25</b>

**\* Service to SilverLine Windows Company**

**Saturday Service Only to SilverLine Windows**

Downtown Terminal	Hwy 55 & Cecil Rd.	Cornwallis & Hwy 55	Lowe's Grove Middle School	SilverLine Windows	SilverLine Windows	Cornwallis & Hwy 55	Hwy 55 & Cecil Rd.	Downtown Terminal
<b>6:30</b>	<b>6:40</b>	<b>6:50</b>	---	<b>6:55</b>	<b>6:55</b>	<b>7:00</b>	<b>7:20</b>	<b>7:25</b>
<b>11:30</b>	<b>11:40</b>	<b>11:50</b>	—	<b>11:55</b>	<b>12:00</b>	<b>12:10</b>	<b>12:20</b>	<b>12:25</b>
<b>6:30</b>	<b>6:40</b>	<b>6:50</b>	--	<b>6:55</b>	<b>7:05</b>	<b>7:10</b>	<b>7:20</b>	<b>7:25</b>

**Map of Durham Showing Silverline**



**REPORT OF THE INTERMODAL COMMITTEE AND  
EXPLANATION OF  
CONGESTION RELIEF AND INTERMODAL TRANSPORTATION  
21<sup>ST</sup> CENTURY FUND**

The Intermodal Committee recommends legislation to:

1. Create the Congestion Relief and Intermodal Transportation 21<sup>st</sup> Century Fund,
2. Set out a framework for grants for intermodal transit capital projects out of this fund, including standards for eligibility. These projects include urban transit and rail freight.
3. Authorize local option revenue options for major urban areas to match these grants
4. Authorize local option revenue options for other urban counties or counties contiguous to urban counties to allow them to raise additional revenues for public transportation systems.
5. Extend the State Ports Tax Credit for five years.

These recommendations allow the State's urban regions to remain good places to live, environmentally sound and economically viable. They allow new urban growth to be absorbed in an environmentally friendly manner, reducing demands on highways and infrastructure, and helping localities target and benefit from economic development. They will also allow strengthening the State's rail freight infrastructure, reducing demand on the highway system, allowing energy efficient movement of goods, and aiding development of the State's ports.

**BACKGROUND**

The Intermodal Committee has at its previous meetings heard from the State's two major Class I railroads (CSX and Norfolk Southern), the North Carolina Railway Association which represents short line railroads, and the North Carolina State Ports Authority all relating to needs for improving freight rail capacity, as well as from three major urban regions (Charlotte, Triangle, and Triad) as to their needs for urban transit capital projects to help reduce and mitigate congestion in an environmentally sound manner. The committee has looked at the potential expenditures on these projects, and estimates State capital needs to match local, and possibly federal, funding at \$1.976 billion over the next 12 fiscal years. This includes \$120 million for state aid for rail access to the State ports, \$119 million for Class 1 railroads, \$65 million for short line railroads, \$30 million for statewide bus grants to local governments, \$34 million for expansion of intercity passenger rail, and \$1.594 billion for urban transit capital grants in the Triangle, Triad, and Charlotte regions. The committee recommends capping the maximum amount of urban transit capital grants for any one region at 33% of the fund.

**NEEDS**

On an annualized basis, looking at projected capital improvement plans for local governments and educated projections, the annual needs would be \$100 million in Fiscal Year 2009-2010, \$112 million in 2010, between \$151 and \$173 million annually for the four years beginning 2011 through 2014, \$189 million in 2015, between \$154 million and

\$180 million annually beginning 2016 through 2019, and \$229 million in 2020. This averages \$161 million per year. The committee recommends this level of funding on an ongoing basis with a continuing source of revenue because if not, grantees will be unable to plan and successfully carry out the programs. These figures are all in 2007 dollars, so any state revenues provided the fund will need to be adjusted over time to match inflationary increases. It should be noted that the actual allocations to the various regions and other applicants will be made by the Board of Transportation based on grant applications, the listed needs are merely illustrative about what could be funded.

The full committee has seen the transit plans for Charlotte and the Intermodal Committee has seen and discussed the plans for the Triangle and Triad. As these are ramping up over the next four fiscal years beginning 7/1/2009, early emphasis will be placed on grants for acquisition of buses by transit systems across the state (including \$12.5 million the first year to cover the state share of \$50 million in bus purchase). Other projects anticipated for funding during the first three years include between \$10 and \$12 million annually for intercity passenger rail, potential uses including a third daily AMTRAK frequency from Charlotte to Raleigh or Selma and a demonstration project by the North Carolina Railroad in Eastern North Carolina.

### **FINDINGS**

The Committee draft legislation makes a number of findings based on facts presented to and researched by the committee. Those findings, which will help you put this in perspective, are:

- (1) Most of North Carolina's growth is in its urban regions. According to the State Data Center, during the first decade of the 21<sup>st</sup> Century, 66% of the projected 1,270,000 growth in population is in 15 urban counties surrounding Charlotte, Raleigh, and the Triad, while 40% is in just six counties: Mecklenburg, Wake, Durham, Orange, Forsyth, and Guilford.
- (2) This large urban population growth greatly taxes resources. Despite the visionary creation of the Highway Trust fund by the 1989 General Assembly and the funding of urban loop highways, congestion continues to grow at an exponential rate. Creation of a special fund to help meet urban transportation needs with alternatives such as rail transit and buses, coupled with land use planning, will spur and guide economic development in a more economically and environmentally sound manner. Charlotte's recent success in opening the first phase of its light rail system, with ridership significantly over projections, shows that North Carolinians are willing to use alternates.
- (3) Accelerated use of rail for transport of freight will reduce highway congestion as well as allow economic expansion in a way that lessens the impact on the State highway system.
- (4) Public transportation, in addition to a program of urban loops and toll roads will enable North Carolina to have a balanced 21<sup>st</sup> Century transportation system.
- (5) As part of its initial program of internal improvements, the State capitalized the North Carolina Railroad in the 1840s, and invested in other railroads, and those internal improvements led to North Carolina's rapid economic development. The North Carolina Railroad, with a 317-mile corridor from Charlotte to Morehead City is still owned by the State.
- (6) Improved rail facilities and restoration of abandoned rail lines can allow increased access to the North Carolina State Ports and military installations located within the State.

- (7) Session Law 2005-222 found that expanding and upgrading passenger, freight, commuter, and short line rail service is important to the economy of North Carolina; and provided that the State would seek to provide matching funds so in part it can leverage the maximum federal and private participation in funding needed rail initiatives, such as the restoration of the rail corridor from Wallace to Castle Hayne, a rail connection between north-south and east-west routes in the vicinity of Pembroke.
- (8) Rail freight plays a vital role in economic development throughout the State. Intermodal service depends on partnerships with trucking companies, seaports, and others in the transportation logistics chain. North Carolina has 3,250 main line miles of track, with Class I railroads holding 79% of the trackage rights, the remainder controlled by local railroads and switching and terminal railroads. The 2006 Mid-Cycle Update to the North Carolina Statewide Intermodal Transportation Plan identified \$799 million in freight rail needs over the next 25 years, including maintenance and preservation, modernization, and expansion.
- (9) North Carolina's short line railroads play a key role in the State's economic development and transportation service and are needed to provide essential services to other modes of transportation and the North Carolina port system. North Carolina agriculture is dependent upon essential service by short line railroads. North Carolina economic development and commerce is dependent upon essential service by short line railroads; and grant funds may be used to improve and restore tracks and lines. State funds are needed to maintain short line railroads as a viable contributor to economic development, agriculture, and transportation in this State in order to prevent the loss of regional rail service. The Department of Transportation reported that 44,992 rail cars handled by short lines kept 179,688 trucks off North Carolina highways.
- (10) Intermodal facilities and inland ports can greatly reduce freight traffic on North Carolina's highway system, reducing demand, congestion, and damage.
- (11) The proposed North Carolina International Port would need high capacity Intermodal access.
- (12) Significant local revenues are needed to match state funds so that a major portion of the expenses are borne by the localities receiving the majority of the benefits. A local option sales tax for public transportation was approved by a 58% favorable vote in Mecklenburg County in 1998, and reaffirmed by a 70% favorable vote in 2008. Extending this authority to additional jurisdictions, along with other revenue options will enable localities to demonstrate local support for additional transit options.
- (13) Surveys have indicated broad public support for both providing additional public transportation options and allowing localities to generate revenue to match State grants.

### **RECOMMENDATIONS**

Based on these findings and demonstrated needs, the legislation:

1. Establishes the framework of the Congestion Relief and Intermodal Transportation 21<sup>st</sup> Century Fund.

#### **LOCAL GOVERNMENT GRANTS**

2. Allows for local government grants from the fund for public transportation purposes to cities, counties, and the state's two transportation authorities (PART in the Triad and Triangle Transit in the Research Triangle.)
3. Provides that grants to local government can not exceed 25% of the project cost, and must be matched by an equal or greater amount of funds by the applicant.
4. Sets the following preconditions for the local government grants: (i) the grant application is approved by all Metropolitan Planning Organizations whose jurisdiction includes any of the service area of the grant applicant; (ii) The

- applicant has approved a transit plan that includes local planning politics and adopted plans that reasonably support transit ridership and appropriate land use; and (iii) The applicant has an adequate and sustainable source of funding established for its share of project costs.
5. Allows grants from the fund may be committed for a multi-year basis to stabilize the phased implementation of a plan.
  6. Provides that Board of Transportation shall approve, and amend from time to time, a rolling 15-year plan projection for allocation of funds under this section.
  7. Provides that no applicant may receive more than 33% of the total funds in a 15-year period.
  8. Requires that qualification for federal funding shall be considered in the review and approval process

#### **SHORT LINE RAILROAD GRANTS**

9. Provides grants from the fund may also be made to state agencies and railroads for assistance to short line railroads to continue and enhance rail service in the State so as to assist in economic development and access to ports and military installations. Short line railroad grants shall not exceed 50% of the nonfederal share, and must be matched by equal or greater funding from the applicant. Total shortline railroad grants under this subdivision may not exceed five million dollars (\$5,000,000) per fiscal year.

#### **RAILROAD GRANTS**

10. Provides grants from the fund may also be made to state agencies and railroads for assistance to any railroad in construction of (i) rail improvements and restorations and intermodal or multimodal facilities to serve ports and military installations; and (ii) inland ports to reduce truck traffic on the highway system. Grants shall not exceed 50% of the nonfederal share, and must be matched by equal or greater funding from the applicant. Total grants under may not exceed ten million dollars (\$10,000,000) per fiscal year.

#### **STATE PORTS RAILROAD GRANTS**

11. Provides grants from the fund may also be made for assistance to the state ports in terminal railroad facilities and railroad operations. Grants under shall not exceed 50% of the nonfederal share, and must be matched by equal or greater funding from the applicant.. Total grants may not exceed fifteen million dollars (\$10,000,000) per fiscal year.

#### **INTERCITY PASSENGER RAIL SERVICE**

12. Provides that grants from the fund may also be made for expansion of intercity passenger rail service, including increased frequency and additional cities served.

#### **LOCAL REVENUE SOURCES**

The committee finds that local government financial participation in urban transit grants is required. Currently, Mecklenburg, the Triangle, and the Triad have different authorizations to raise such funding. Mecklenburg has authority for a sales tax, the Triangle and the Triad for a vehicle registration fee, and all three regions a levy on motor vehicle rentals. Other urbanized or urbanizing counties also have significant needs for

new revenues for public transportation. The committee has examined the existing revenue options and the legislation will provide the following:

#### LOCAL OPTION SALES TAX WITH REFERENDUM

The 1997 General Assembly granted Mecklenburg County the option of levying a ½% sales tax for public transportation purposes. The legislation required a referendum Mecklenburg held its initial referendum in 1998, with voter approving the levy by a 58% to 42% margin. In 2007, a second referendum was held, with voters approving by a 70% to 30% margin continuation of the tax. The legislation will:

13. Make several technical corrections in the Mecklenburg transit tax.
14. Allow a 1/2% sales tax for public transportation purposes to be levied after a favorable referendum in one or more of the Triangle counties (Wake, Durham, and Orange) with approval of the applicable county board or boards of commissioners and the board of Triangle Transit.
15. Allow a 1/2% sales tax for public transportation purposes to be levied after a favorable referendum in one of more of the major counties in the Triad (Forsyth or Guilford), who are likely to finance a major urban transit project. The tax will also require approval of the applicable county board or boards of commissioners and the Piedmont Authority for Regional Transportation (PART).
16. Allow a ¼% sales tax for public transportation purposes to be levied after a favorable referendum in the remaining counties in the Triad: (Davidson, Randolph, Alamance, Davie, Rockingham, Surry, Stokes, and Yadkin) with approval of the applicable county board or boards of commissioners and the Piedmont Authority for Regional Transportation (PART). These eight counties are expected to have major needs for public transportation services, but not to the same extent as Forsyth and Guilford Counties. Programs in these counties might include significant expansion of bus service, including express bus service to employment centers, or extension of a commuter rail line.
17. In any multi-county referendum within either the Triangle or Triad, the total vote in all the counties voting determines the result. In both cases, if the initial favorable referendum is conducted in less than all the counties eligible, counties can be added later with approval of the applicable county board of commissioners, the applicable transportation authority, and the voters of the county or counties being added.
18. Allows a single county ¼% sales tax for public transportation purposes to be levied after a favorable referendum in any county contiguous to Mecklenburg County (Cabarrus, Gaston, Iredell, Lincoln and Union), in any county contiguous to Durham, Orange, or Wake Counties (Caswell, Chatham, Franklin, Granville, Harnett, Johnston, Lee, Nash, and Person), and in any county with a population of 160,000 or over according to the most recent decennial federal census (Buncombe, Cumberland and New Hanover as of 2008) These counties have substantial needs for urban transit, but not to the same level as those counties suggested to have a ½% limit. Programs in these counties might include significant expansion of bus service, or commuter rail links to other urban counties.

#### LOCAL VEHICLE REGISTRATION FEE AND MOTOR VEHICLE RENTAL FEE

The 1991 General Assembly allowed Triangle Transit to levy in Wake, Durham, and Orange County a vehicle registration fee of not to exceed five dollars (\$5.00) per motor vehicle. That tax has been levied in all three counties. The 1997 General Assembly allowed PART to adopt a similar levy in the Triad Counties, but thus far this has been levied only in Randolph County.

19. The committee recommends raising the cap on vehicle registration fee for Triangle and Triad from five dollars (\$5.00) to seven dollars (\$7.00) to reflect inflation since it was first approved in 1991. The actual current rate of inflation would actually take the levy to \$7.82, but the committee at this time recommends the increase to the even dollar amount.
20. The committee recommends extending the motor vehicle registration fee authority to Mecklenburg County. This action, coupled with recommendations 13 through 17 will give all three major urban areas the same local option authority.
21. The committee recommends extending the motor vehicle registration fee authority to any county contiguous to Mecklenburg County (Cabarrus, Gaston, Iredell, Lincoln and Union), in any county contiguous to Durham, Orange, or Wake Counties (Caswell, Chatham, Franklin, Granville, Harnett, Johnston, Lee, Nash, and Person), and in any county with a population of 160,000 or over according to the most recent decennial federal census (Buncombe, Cumberland, and New Hanover as of 2008) In addition, to the extent that any of those counties does not levy the full permitted seven dollars, and city located wholly within that county will be authorized to levy a full dollar rate to the extent that the city and county rate added together does not exceed the seven dollar cap. It is felt that the extension of the motor vehicle registration fee to counties contiguous to urban areas will allow them to add additional public transportation services, especially commuter and express bus service to help improve air quality and commuting. Extension of this fee to large counties such as Buncombe, Cumberland, and New Hanover will allow them to provide enhanced public transportation services.
22. The committee also recommends extending the authority to levy a motor vehicle rental charge of not to exceed five percent which is now authorized in the Triad, Triangle and Mecklenburg to the same counties and municipalities that paragraph 21 proposes to extend the motor vehicle registration fee and for the same purposes and rationale.

### **STATE PORTS TAX CREDIT**

The state ports tax credit encourages businesses to use the two State-owned port terminals at Wilmington and Morehead City. The committee recommends extending the credit from its current 2009 expiration out five years to 2014. This extension has been requested by the North Carolina Ports Authority. The five-year extension of the Ports Tax Credit would allow the Ports to continue offering this business incentive to existing and potential customers and to stimulate economic growth for the State. Extending the NC Ports tax credit costs the State's general fund less than one million dollars each year, and allows companies such as Goodyear, CK International, JB International, Drexel Heritage Furniture, QVC, Martin Marietta, EN Beards Hardwoods Lumber, Edwards Wood Products, Culp, Inc., Broyhill, Kilop USA, Thomasville Furniture, Cormetech, Stein Fibers, Ltd., New South International, and Sonoco to be competitive in world markets.

The NC Ports tax credit supports these and other industries and the thousands of jobs and millions of dollars in tax revenues that they contribute to our State.

The state ports tax credit, originally enacted in 1992, encourages exporters and importers to use State-owned port terminals. This credit, extended in 1995, 1997, 2001, 2002 and 2004 expires January 2009.

The tax credit equals the amount of wharfage, handling, and throughput charges paid to the North Carolina State Ports Authority in the taxable year that exceeds the average amount of charges paid to the Authority for the current tax year and the two previous tax years. The credit is limited to 50% of the tax imposed on the taxpayer for the taxable year and has a five-year carry forward on excess credit. The maximum cumulative credit that one taxpayer may claim is \$2 million. The estimated cost to the General Fund is less than one million annually.

Adopted by Intermodal Committee March 24, 2008

F:/MyDocuments/21<sup>st</sup> Century Intermodal Committee Report 03242008.doc

GENERAL ASSEMBLY OF NORTH CAROLINA  
SESSION 2007

H

D

BILL DRAFT 2007-LBx-401P [v.1] (1/22)

(THIS IS A DRAFT AND IS NOT READY FOR INTRODUCTION)  
3/24/2008 11:56:16 AM

Short Title: Congestion Relief/Intermodal Transport Fund. (Public)

Sponsors: Representative.

Referred to:

1 A BILL TO BE ENTITLED  
2 AN ACT TO ESTABLISH A CONGESTION RELIEF AND INTERMODAL  
3 TRANSPORTATION 21<sup>ST</sup> CENTURY FUND, TO PROVIDE FOR  
4 ALLOCATION OF THOSE FUNDS TO: (1) LOCAL GOVERNMENTS AND  
5 TRANSPORTATION AUTHORITIES FOR PUBLIC TRANSPORTATION  
6 PURPOSES, (2) SHORT LINE RAILROADS, FOR ASSISTANCE IN  
7 MAINTAINING AND EXPANDING FREIGHT SERVICE STATEWIDE (3)  
8 RAILROADS FOR INTERMODAL FACILITIES, MULTIMODAL FACILITIES,  
9 AND INLAND PORTS, (4) MAKE CAPITAL IMPROVEMENTS ON RAIL  
10 LINES TO ALLOW INCREASED FREIGHT SERVICE TO THE PORTS AND  
11 MILITARY INSTALLATIONS, (5) EXPAND INTERCITY PASSENGER RAIL  
12 SERVICE, AND TO EXTEND COMMON LEVELS OF LOCAL TRANSIT  
13 FUNDING AUTHORIZATION TO THREE URBAN REGIONS, AND ALLOW  
14 OTHER LOCAL GOVERNMENTS SIMILAR OPTIONS FOR LOCAL TRANSIT  
15 FUNDING, AND TO EXTEND THE STATE PORTS TAX CREDIT

16 The General Assembly of North Carolina enacts:

17

18 INTERMODAL COMMITTEE DRAFT ADOPTED 3/24/2008

19

20 CHAPTER I. Fund Created.

21

22 SECTION 1. Chapter 136 of the General Statutes is amended by adding a  
23 new Article to read:

24

ARTICLE 19.

25

Congestion Relief and Intermodal 21<sup>st</sup> Century Transportation Fund

26

**"§ 136-250. Congestion Relief and Intermodal Transportation 21<sup>st</sup> Century Fund.**

27

There is established in the State Treasury the Congestion Relief and Intermodal  
Transportation 21st Century Fund, hereinafter referred to as the fund. The fund shall

1 consist of all revenues appropriated and allocated to it. Interest on earnings of the fund  
2 shall remain within the fund.

3 **"§ 136-251. Findings of fact.**

4 The General Assembly finds that:

- 5 (1) Most of North Carolina's growth is in its urban regions. According to  
6 the State Data Center, during the first decade of the 21<sup>st</sup> Century, 66%  
7 of the projected 1,270,000 growth in population is in 15 urban counties  
8 surrounding Charlotte, Raleigh, and the Triad, while 40% is in just six  
9 counties: Mecklenburg, Wake, Durham, Orange, Forsyth, and  
10 Guilford.
- 11 (2) This large urban population growth greatly taxes resources. Despite  
12 the visionary creation of the Highway Trust fund by the 1989 General  
13 Assembly and the funding of urban loop highways, congestion  
14 continues to grow at an exponential rate. Creation of a special fund to  
15 help meet urban transportation needs with alternatives such as rail  
16 transit and buses, coupled with land use planning, will spur and guide  
17 economic development in a more economically and environmentally  
18 sound manner. Charlotte's recent success in opening the first phase of  
19 its light rail system, with ridership significantly over projections,  
20 shows that North Carolinians are willing to use alternates.
- 21 (3) Accelerated use of rail for transport of freight will reduce highway  
22 congestion as well as allow economic expansion in a way that lessens  
23 the impact on the State highway system.
- 24 (4) Public transportation, in addition to a program of urban loops and toll  
25 roads will enable North Carolina to have a balanced 21<sup>st</sup> Century  
26 transportation system.
- 27 (5) As part of its initial program of internal improvements, the State  
28 capitalized the North Carolina Railroad in the 1840s, and invested in  
29 other railroads, and those internal improvements led to North  
30 Carolina's rapid economic development. The North Carolina Railroad,  
31 with a 317-mile corridor from Charlotte to Morehead City is still  
32 owned by the State.
- 33 (6) Improved rail facilities and restoration of abandoned rail lines can  
34 allow increased access to the North Carolina State Ports and military  
35 installations located within the State.
- 36 (7) Session Law 2005-222 found that expanding and upgrading passenger,  
37 freight, commuter, and short line rail service is important to the  
38 economy of North Carolina; and provided that the State would seek to  
39 provide matching funds so in part it can leverage the maximum federal  
40 and private participation in funding needed rail initiatives, such as the  
41 restoration of the rail corridor from Wallace to Castle Hayne, and a rail  
42 connection between north-south and east-west routes in the vicinity of  
43 Pembroke.

- 1           (8) Rail freight plays a vital role in economic development throughout the  
2 State. Intermodal service depends on partnerships with trucking  
3 companies, seaports, and others in the transportation logistics chain.  
4 North Carolina has 3,250 main line miles of track, with Class I  
5 railroads holding 79% of the trackage rights, the remainder controlled  
6 by local railroads and switching and terminal railroads. The 2006  
7 Mid-Cycle Update to the North Carolina Statewide Intermodal  
8 Transportation Plan identified \$799 million in freight rail needs over  
9 the next 25 years, including maintenance and preservation,  
10 modernization, and expansion.
- 11           (9) North Carolina's short line railroads play a key role in the State's  
12 economic development and transportation service and are needed to  
13 provide essential services to other modes of transportation and the  
14 North Carolina port system. North Carolina agriculture is dependent  
15 upon essential service by short line railroads. North Carolina economic  
16 development and commerce is dependent upon essential service by  
17 short line railroads; and grant funds may be used to improve and  
18 restore tracks and lines. State funds are needed to maintain short line  
19 railroads as a viable contributor to economic development, agriculture,  
20 and transportation in this State in order to prevent the loss of regional  
21 rail service. The Department of Transportation reported that 44,992  
22 rail cars handled by short lines kept 179,688 trucks off North Carolina  
23 highways.
- 24           (10) Intermodal facilities and inland ports can greatly reduce freight traffic  
25 on North Carolina's highway system, reducing demand, congestion,  
26 and damage.
- 27           (11) The proposed North Carolina International Port would need high  
28 capacity Intermodal access.
- 29           (12) Significant local revenues are needed to match state funds so that a  
30 major portion of the expenses are borne by the localities receiving the  
31 majority of the benefits. A local option sales tax for public  
32 transportation was approved by a 58% favorable vote in Mecklenburg  
33 County in 1998, and reaffirmed by a 70% favorable vote in 2008.  
34 Extending this authority to additional jurisdictions, along with other  
35 revenue options will enable localities to demonstrate local support for  
36 additional transit options.
- 37           (13) Surveys have indicated broad public support for both providing  
38 additional public transportation options and allowing localities to  
39 generate revenue to match State grants.

40 **"§ 136-252. Grants to local governments and transportation authorities.**

41           (a) Cities, counties, regional public transportation authorities under Article 26 of  
42 Chapter 160A of the General Statutes, and regional transportation authorities under  
43 Article 27 of Chapter 160A of the General Statutes may receive grants from the fund for  
44 public transportation purposes.

1 (b) No grant may be approved from the fund unless:

2 (1) The application is approved by all Metropolitan Planning  
3 Organizations under Article 16 of this Chapter whose jurisdiction  
4 includes any of the service area of the grant applicant.

5 (2) The applicant has approved a transit plan that includes local planning  
6 policies and adopted plans that reasonably support transit ridership and  
7 appropriate land use.

8 (3) The applicant has an adequate and sustainable source of funding  
9 established for its share of project costs.

10 (c) Grants from the fund may be committed for a multi-year basis to stabilize the  
11 phased implementation of a plan. The Board of Transportation shall approve, and  
12 amend from time to time, a rolling multi-year projection of up to 15 years for allocation  
13 of funds under this section. No applicant is eligible under the 15-year plan projection for  
14 more than one-third of the total funds to be granted under this Article during that  
15 15-year period.

16 (d) No grant under this section may exceed twenty-five percent (25%) of the cost  
17 of the project, and must be matched by an equal or greater amount of funds by the  
18 applicant. In evaluating projects, qualification for federal funding shall be considered.

19 **"§ 136-253. Grants to other units.**

20 Grants from the fund may also be made to state agencies and railroads for the  
21 following purposes:

22 (1) Assistance to short line railroads to continue and enhance rail service  
23 in the State so as to assist in economic development and access to ports  
24 and military installations. This may involve both the Rail Industrial  
25 Access program and the Short Line Infrastructure Access Program, as  
26 well as other innovative programs. Grants under this subdivision shall  
27 not exceed 50% of the nonfederal share, and must be matched by equal  
28 or greater funding from the applicant. Total grants under this  
29 subdivision may not exceed five million dollars (\$5,000,000) per fiscal  
30 year.

31 (2) Assistance to any railroad in construction of (i) rail improvements and  
32 restorations and intermodal or multimodal facilities to serve ports and  
33 military installations; and (ii) inland ports to reduce truck traffic on  
34 the highway system. Grants under this subdivision shall not exceed  
35 50% of the nonfederal share, and must be matched by equal or greater  
36 funding from the applicant. Total grants under this subdivision may  
37 not exceed ten million dollars (\$10,000,000) per fiscal year.

38 (3) Assistance to the state ports in terminal railroad facilities and  
39 operations, and to improve access to military installations, and to the  
40 North Carolina International Port. Grants under this subdivision shall  
41 not exceed 50% of the nonfederal share, and must be matched by equal  
42 or greater funding from the applicant.. Total grants under this  
43 subdivision may not exceed ten million dollars (\$10,000,000) per  
44 fiscal year.



- 1 (4) Transportation authority. A regional public transportation authority or  
2 a regional transportation authority created pursuant to Article 26 or  
3 Article 27 of Chapter 160A of the General Statutes.

4 **"§ 105-506.1. Exemption of food.**

5 A tax levied under this Article does not apply to the sales price of food that is not  
6 otherwise exempt from tax pursuant to G.S. 105-164.13 but would be exempt from the  
7 State sales and use tax pursuant to G.S. 105-164.13 if it were purchased with coupons  
8 issued under the Food Stamp Program, 7 U.S.C. § 2011.

9  
10 Part 2. Mecklenburg County.

11 **"§ 105-507. Limitations.**

12 A county may not levy a tax under this ~~Article-Part~~ unless the county or at least one  
13 unit of local government in the county operates a public transportation system. In  
14 addition, a county may not levy a tax under this ~~Article-Part~~ unless it has developed a  
15 financial plan and distributed it to each unit of local government in the county that  
16 operates a local public transportation system. The financial plan must provide for  
17 equitable allocation of the net proceeds distributed to the county in consideration of the  
18 identified needs of local public transportation systems in the county, countywide human  
19 service transportation systems, and expansion of public transportation service to  
20 unserved areas in the county.

21 **"§ 105-508. Local election on adoption of sales and use tax.**

22 (a) Resolution. – The board of commissioners of a county may direct the county  
23 board of elections to conduct an advisory referendum within the county on the question  
24 of whether a local sales and use tax at the rate of one-half percent (1/2%) may be levied  
25 in accordance with this ~~Article-Part~~. The election shall be held on a date jointly agreed  
26 upon by the boards and shall be held in accordance with the procedures of  
27 G.S. 163-287. The board of commissioners shall hold a public hearing on the question  
28 at least 30 days before the date the election is to be held.

29 (b) Ballot Question. – The form of the question to be presented on a ballot for a  
30 special election concerning the levy of a tax authorized by this Article shall be:

31 **'[ ] FOR [ ] AGAINST**

32 **One-half percent (1/2%) local sales and use taxes, in addition to the current ~~two percent~~**  
33 **(~~2%~~) local sales and use taxes, to be used only for public transportation systems.'**

34 **"§ 105-509. Levy and collection of sales and use tax.**

35 If the majority of those voting in a referendum held pursuant to this ~~Article-Part~~ vote  
36 for the levy of the tax, the board of commissioners of the county may, by resolution,  
37 levy one-half percent (1/2%) local sales and use taxes in addition to any other State and  
38 local sales and use taxes levied pursuant to law. Except as provided in this ~~Article-Part~~,  
39 the adoption, levy, collection, administration, and repeal of these additional taxes shall  
40 be in accordance with Article 39 of this Chapter. In applying the provisions of Article  
41 39 of this Chapter to this ~~Article-Part~~, references to 'this Article' mean 'Part 1 of Article  
42 43 of Chapter 105 of the General Statutes'.

43 ~~A tax levied under this Article does not apply to the sales price of food that is not~~  
44 ~~otherwise exempt from tax pursuant to G.S. 105-164.13 but would be exempt from the~~

1 ~~State sales and use tax pursuant to G.S. 105-164.13 if it were purchased with coupons~~  
2 ~~issued under the Food Stamp Program, 7 U.S.C. § 51.~~

3  
4 **"§ 105-510. Distribution and use of taxes.**

5 (a) Distribution. – The Secretary shall, on a quarterly basis, allocate to each  
6 taxing county the net proceeds of the tax levied under this ~~Article-Part~~ by that county. If  
7 the Secretary collects taxes under this ~~Article-Part~~ in a month and the taxes cannot be  
8 identified as being attributable to a particular taxing county, the Secretary shall allocate  
9 these taxes among the taxing counties, in proportion to the amount of taxes collected in  
10 each county under this ~~Article-Part~~ in that month and shall include them in the quarterly  
11 distribution.

12 The Secretary shall distribute the net proceeds of the tax levied by a county on a per  
13 capita basis among the county and the units of local government in the county that  
14 operate public transportation systems. No proceeds shall be distributed to a county that  
15 does not operate a public transportation system or to a unit of local government that  
16 does not operate a public transportation system.

17 (b) Use. – A county must allocate the net proceeds distributed to it in accordance  
18 with its financial plan adopted pursuant to G.S. 105-507 and use the net proceeds only  
19 for financing, constructing, operating, and maintaining local public transportation  
20 systems. Any other unit of local government may use the net proceeds distributed to it  
21 under this ~~Article-Part~~ only for financing, constructing, operating, and maintaining  
22 local public transportation systems. Every unit of government shall use the net proceeds  
23 to supplement and not to supplant or replace existing funds or other resources for public  
24 transportation systems.

25 **"§ 105-510.1. Applicability.**

26 This ~~section-Part~~ applies only to Mecklenburg County.

27 Part 3. Transportation Authorities.

28 **"§ 105-510.5. Limitations.**

29 A transportation authority may not levy a tax under this Part unless:

- 30 (1) It operates a public transportation system.  
31 (2) It has developed a financial plan and distributed it to each unit of local  
32 government located within its territorial jurisdiction. The financial plan  
33 must provide for equitable use of the net proceeds within the special  
34 district created under this Part. The plan may be revised from time to  
35 time.  
36 (3) The tax is approved by the voters.

37 **"§ 105-510.6. Local election on adoption of sales and use tax- regional public**  
38 **transportation authority.**

39 (a) Special district. A transportation authority may create a special district that  
40 consists of the entire area of one or more counties within its territorial jurisdiction and  
41 may levy on behalf of the special district the tax authorized in this section. A special  
42 district created pursuant to this subsection is a body corporate and politic and has the  
43 power to carry out the purposes of this subsection. The board of trustees of the  
44 transportation authority shall serve, ex officio, as the governing body of a special

1 district it creates pursuant to this subsection. The proceeds of a tax levied under this  
2 section may be used only for the benefit of the special district and only for the purposes  
3 provided in this Article. In the case of a regional transportation authority created  
4 pursuant to Article 27 of Chapter 160A of the General Statutes, the special district may  
5 not include counties other than Forsyth and Guilford Counties.

6 (b) Resolution. –The board of trustees of the authority, with the concurrent vote  
7 of:

8 (1) In the case of a single-county special district, a majority of the county  
9 board of commissioners within the special district

10 (2) In the case of a multi-county special district, a majority vote of all the  
11 county boards of commissioners within the special district

12 may direct the respective county board or boards of elections to conduct an advisory  
13 referendum within the special tax district on the question of whether a local sales and  
14 use tax at the rate of one-half percent (1/2%) may be levied within the district in  
15 accordance with this Part. The election shall be held on a date jointly agreed upon by  
16 the authority and the county board or boards of elections and shall be held in accordance  
17 with the procedures of G.S. 163-287. The board or boards of commissioners shall hold a  
18 public hearing on the question at least 30 days before the date the election is to be held.

19 (c) Ballot Question. – The form of the question to be presented on a ballot for a  
20 special election concerning the levy of a tax authorized by this Article shall be:

21 '[ ] FOR [ ] AGAINST

22 One-half percent (1/2%) local sales and use taxes, to be used only for public  
23 transportation systems.'

24 **"§ 105-510.7. Levy and collection of sales and use tax – regional public**  
25 **transportation authority.**

26 If the majority of those voting in a referendum held pursuant to G.S. 105-510.6 vote  
27 for the levy of the tax, the transportation authority may, by resolution, levy one-half  
28 percent (1/2%) local sales and use taxes within the special district, in addition to any  
29 other State and local sales and use taxes levied pursuant to law. In determining the  
30 results of the election in a multi-county district, all the counties of the district shall be  
31 considered to be one unit. Except as provided in this Part, the adoption, levy, collection,  
32 administration, and repeal of these additional taxes shall be in accordance with Article  
33 39 of this Chapter. In applying the provisions of Article 39 of this Chapter to this  
34 Article, references to 'this Article' mean 'Part 2 of Article 43 of Chapter 105 of the  
35 General Statutes'. Any repeal of the tax shall be done by the same procedure as its  
36 enactment under section, and a petition for repeal under G.S. 105-473 shall be judged  
37 by the total votes in all three counties.

38 **"§ 105-510.8. Expansion of district.**

39 If a special district established under this Part does not include all the counties in the  
40 territorial jurisdiction of a transportation authority, it may be expanded to include an  
41 additional whole county or counties by joint action of the board of trustees of the  
42 transportation authority and the board of commissioners of the county or boards of  
43 commissioners of the counties to be added, with the approval of the voters in the county  
44 or counties to be added. The procedure for addition of a county or counties shall be the

1 same as for the initial creation of the district, but the referendum shall be held separately  
2 within each of the counties to be added.

3 **"§ 105-510.9. Distribution and use of taxes.**

4 (a) Distribution. – The Secretary shall, on a quarterly basis, allocate to each  
5 transportation authority the net proceeds of the tax levied under this Part within the  
6 special tax district, to be used for the benefit of that district.

7 (b) Use. – A transportation authority must expend the net proceeds distributed to  
8 it in accordance with its financial plan adopted pursuant to G.S. 105-510.5 and use the  
9 net proceeds only for financing, constructing, operating, and maintaining local public  
10 transportation systems. The transportation authority shall use the net proceeds to  
11 supplement and not to supplant or replace existing funds or other resources for public  
12 transportation systems.

13 Part 4. Other Counties.

14 **"§ 105-510.12. Limitations.**

15 A county may not levy a tax under this Part unless the county or at least one unit of  
16 local government in the county operates a public transportation system, or contracts  
17 with a transportation authority to provide a public transportation system. In addition, a  
18 county may not levy a tax under this Part unless it has developed a financial plan and  
19 distributed it to each unit of local government in the county that operates a local public  
20 transportation system. The financial plan must provide for equitable allocation of the net  
21 proceeds distributed to the county in consideration of the identified needs of local public  
22 transportation systems in the county, countywide human service transportation systems,  
23 and expansion of public transportation service to unserved areas in the county.

24 **"§ 105-510.13 Local election on adoption of sales and use tax.**

25 (a) Resolution. – The board of commissioners of a county may direct the county  
26 board of elections to conduct an advisory referendum within the county on the question  
27 of whether a local sales and use tax at the rate of one-quarter percent (1/4%) may be  
28 levied in accordance with this Part. The election shall be held on a date jointly agreed  
29 upon by the boards and shall be held in accordance with the procedures of  
30 G.S. 163-287. The board of commissioners shall hold a public hearing on the question  
31 at least 30 days before the date the election is to be held.

32 (b) Ballot Question. – The form of the question to be presented on a ballot for a  
33 special election concerning the levy of a tax authorized by this Article shall be:

34 **'[ ] FOR [ ] AGAINST**

35 One-quarter percent (1/4%) local sales and use taxes, in addition to the current local  
36 sales and use taxes, to be used only for public transportation systems.'

37 **"§ 105-510.14. Levy and collection of sales and use tax.**

38 If the majority of those voting in a referendum held pursuant to this Part vote for the  
39 levy of the tax, the board of commissioners of the county may, by resolution, levy  
40 one-quarter percent (1/4%) local sales and use taxes in addition to any other State and  
41 local sales and use taxes levied pursuant to law. Except as provided in this Part, the  
42 adoption, levy, collection, administration, and repeal of these additional taxes shall be in  
43 accordance with Article 39 of this Chapter. In applying the provisions of Article 39 of

1 this Chapter to this Part, references to 'this Article' mean 'Part 1 of Article 43 of Chapter  
2 105 of the General Statutes'.

3 **"§ 105-510.15. Distribution and use of taxes.**

4 (a) Distribution. – The Secretary shall, on a quarterly basis, allocate to each  
5 taxing county the net proceeds of the tax levied under this Part by that county. If the  
6 Secretary collects taxes under this Part in a month and the taxes cannot be identified as  
7 being attributable to a particular taxing county, the Secretary shall allocate these taxes  
8 among the taxing counties, in proportion to the amount of taxes collected in each county  
9 under this Part in that month and shall include them in the quarterly distribution.

10 The Secretary shall distribute the net proceeds of the tax levied by a county on a per  
11 capita basis among the county and the units of local government in the county that  
12 operate public transportation systems. No proceeds shall be distributed to a county that  
13 does not operate a public transportation system or to a unit of local government that  
14 does not operate a public transportation system.

15 (b) Use. – A county must allocate the net proceeds distributed to it in accordance  
16 with its financial plan adopted pursuant to G.S. 105-507 and use the net proceeds only  
17 for financing, constructing, operating, and maintaining local public transportation  
18 systems. Any other unit of local government may use the net proceeds distributed to it  
19 under this Part only for financing, constructing, operating, and maintaining local public  
20 transportation systems. Every unit of government shall use the net proceeds to  
21 supplement and not to supplant or replace existing funds or other resources for public  
22 transportation systems.

23 **"§ 105-510.16. Applicability.**

24 (a) This Part only applies in counties that meet one or more of the following  
25 criteria:

- 26 (1) Have a population of 160,000 or over according to the most recent  
27 decennial federal census.  
28 (2) Are members of a regional transportation authority created pursuant to  
29 Article 27 of Chapter 160A of the General Statutes.  
30 (3) Are contiguous to Mecklenburg County.  
31 (4) Are contiguous to Wake, Durham, or Orange County.

32 (b) This part does not apply to Durham, Forsyth, Guilford, Mecklenburg, Orange,  
33 or Wake Counties."

34  
35 CHAPTER III. Extension of Vehicle Registration Charge to Mecklenburg County.

36 SECTION 3. Section 6.2 of S.L. 1997-417, as added by Section 30 of S.L.  
37 2006-162 reads as rewritten:

38 "SECTION 3.1. (a) A county authorized to impose a tax under Part 2 of Article 43  
39 of Chapter 105 of the General Statutes, as enacted by Part 1 of this act, Statutes is  
40 considered an authority ~~under~~ under:

- 41 (1) Article 50 of Chapter 105 of the General Statutes, as enacted by  
42 Section 3 of this act, and the board of commissioners of that county is  
43 considered the board of trustees of the authority under Article 50.  
44 G.S. 105-554 of Article 50 does not apply to the proceeds of a tax

1 imposed by a county considered an authority under this section. The  
2 proceeds of a tax imposed by a county considered an authority under  
3 this section must be transferred to the largest city in that county  
4 operating a public transportation system and used only for financing,  
5 constructing, operating, and maintaining a public transportation  
6 system. The proceeds may supplant existing funds allocated for a  
7 public transportation system. The term 'public transportation system'  
8 has the same meaning as defined in ~~G.S. 105-506~~ of Article 43.  
9 G.S. 105-506.

10 (2) Article 51 of Chapter 105 of the General Statutes, as enacted by  
11 Section 4 of this act, and the board of commissioners of that county is  
12 considered the board of trustees of the authority under Article 51. The  
13 proceeds of a tax imposed by a county considered an authority under  
14 this section must be transferred to the largest city in that county  
15 operating a public transportation system and used only for financing,  
16 constructing, operating, and maintaining a public transportation  
17 system. The term 'public transportation system' has the same meaning  
18 as defined in G.S. 105-506."

19  
20 CHAPTER IV. Local Vehicle Registration Charge Adjusted for Inflation.

21 SECTION 4.(a) Effective July 1, 2008, G.S. 105-561(a) reads as rewritten:

22 "(a) Tax Authorized. – The board of trustees of an Authority may, by resolution,  
23 levy an annual license tax in accordance with this Article upon any motor vehicle with a  
24 tax situs within its territorial jurisdiction. The purpose of the tax levied under this

25 Article is to raise revenue for capital and operating expenses of an Authority in  
26 providing public transportation systems. The rate of tax levied under this Article must  
27 be a full dollar amount, but may not exceed ~~five dollars (\$5.00)~~ seven dollars (\$7.00) a

28 SECTION 4.(b) Effective July 1, 2008, G.S. 105-561(d) reads as rewritten:

29 "(d) Special Tax District. – If a regional transportation authority created under  
30 Article 27 of Chapter 160A of the General Statutes has not levied the tax under this  
31 section or has levied the tax at a rate of less than ~~five dollars (\$5.00)~~ seven dollars  
32 (\$7.00) it may create a special district that consists of the entire area of one or more  
33 counties within its territorial jurisdiction and may levy on behalf of the special district  
34 the tax authorized in this section. The rate of tax levied within the special district may  
35 not, when combined with the rate levied within the entire territorial jurisdiction of the  
36 authority, exceed ~~five dollars (\$5.00)~~ seven dollars (\$7.00). The regional transportation  
37 authority may not levy or increase a tax within the special district unless the board of  
38 commissioners of each county in the special district has adopted a resolution approving  
39 the levy or increase.

40 A special district created pursuant to this subsection is a body corporate and politic  
41 and has the power to carry out the purposes of this subsection. The board of trustees of  
42 the regional transportation authority created under Article 27 of Chapter 160A of the  
43 General Statutes shall serve, ex officio, as the governing body of a special district it  
44 creates pursuant to this subsection. The proceeds of a tax levied under this subsection

1 may be used only for the benefit of the special district and only for the purposes  
2 provided in G.S. 105-564. Except as provided in this subsection, a tax levied under this  
3 subsection is governed by the provisions of this Article.

4  
5 CHAPTER V. Extension of Vehicle Registration Charge and Motor Vehicle Rental  
6 Charge to Counties Contiguous to the Triangle and Mecklenburg County and to Other  
7 Urban Counties  
8

9 SECTION 5. Subchapter IX of Chapter 105 of the General Statutes is  
10 amended by adding a new Article to read:

11 "Article 52. Urban County Vehicle Rental Tax and Registration Tax.

12 **"§ 105-557. Urban County Vehicle Rental Tax.**

13 (a) A county authorized to impose a tax under Part 4 of Article 43 of  
14 Chapter 105 of the General Statutes is considered an authority under Article 50 of this  
15 Chapter, and the board of commissioners of that county is considered the board of  
16 trustees of the authority under Article 50.

17 (b) To the extent that any county does not levy the full percentage  
18 authorized by Article 50 of this Chapter, any city located wholly within that county is  
19 considered an authority under Article 50 of this Chapter, and may levy a percentage  
20 under that Article as if it were an authority, such that the total gross levy of the county  
21 and city does not exceed the maximum permitted by law. For that purpose, the  
22 governing board of that city is considered the board of trustees of the authority under  
23 Article 50.

24 If thereafter the county levies a tax at a rate that, combined with the city rate,  
25 would exceed the maximum, then the new county rate shall become effective on the  
26 first day of the next fiscal year beginning at least 60 days after adoption, and that levy  
27 automatically reduces the city rate on that date so the combined rate does not exceed the  
28 maximum.

29 (c) The proceeds of a tax imposed by a county or city considered an  
30 authority under this section may be used by that county or city to operate or contract for  
31 the operation of a public transportation system and used only for financing,  
32 constructing, operating, and maintaining a public transportation system. The term  
33 'public transportation system' has the same meaning as defined in G.S. 105-506.

34 **"§ 105-558; Urban County Vehicle Registration Tax.**

35 (a) A county authorized to impose a tax under Part 4 of Article 43 of  
36 Chapter 105 of the General Statutes is considered an authority under Article 51 of this  
37 Chapter, and the board of commissioners of that county is considered the board of  
38 trustees of the authority under Article 51.

39 (b) To the extent that any county does not levy the full amount authorized  
40 by Article 51 of this Chapter, any city located wholly within that county is considered  
41 an authority under Article 51 of this Chapter may levy an amount under that Article (in  
42 whole dollars) as if it were an authority, such that the total gross levy of the county and  
43 city does not exceed the maximum permitted by law. For that purpose, the governing  
44 board of that city is considered the board of trustees of the authority under Article 51.

1           If thereafter the county levies a tax at a rate that, combined with the city rate,  
2 would exceed the maximum, then the new county rate shall become effective on the  
3 first day of the next fiscal year beginning at least 60 days after adoption, and that levy  
4 automatically reduces the city rate on that date so the combined rate does not exceed the  
5 maximum.

6           (c) The proceeds of a tax imposed by a county or city considered an  
7 authority under this section may be used by that county or city to operate or contract for  
8 the operation of a public transportation system and used only for financing,  
9 constructing, operating, and maintaining a public transportation system. The term  
10 'public transportation system' has the same meaning as defined in G.S. 105-506. Any  
11 levy by a city under this section is in addition to any authority granted by G.S. 20-97 or  
12 any other local act.

13  
14                           CHAPTER V. Extension of State Ports Tax Credit.

15  
16           **SECTION 6.(a)** G.S. 105-130.41(d) reads as rewritten:

17           "(d) Sunset. – This section is repealed effective for taxable years beginning on or  
18 after January 1, ~~2009~~ 2014."

19           **SECTION 6.(b)** G.S. 105-151.22(d) reads as rewritten:

20           "(d) Sunset. – This section is repealed effective for taxable years beginning on or  
21 after January 1, ~~2009~~ 2014."

22           **SECTION 7.** This act is effective when it becomes law.

**DURHAM – CHAPEL HILL – CARRBORO METROPOLITAN PLANNING ORGANIZATION**

**DRAFT POSITION PAPER**

**DRAFT LEGISLATION BILL 2007**

**CONGESTION RELIEF/INTERMODAL TRANSFER FUND**

In 2007 the 21<sup>st</sup> Century Transportation Committee was formed by North Carolina Governor Michael Easley. The committee was charged with the responsibility to study the transportation infrastructure needs of the state. Some of the activities the committee was required to report on include:

- Innovative methods to fund transportation needs of the state including an examination of the traditional and non traditional methods of financing transportation infrastructure
- Local funding options for transportation.

One outcome of the 21<sup>st</sup> Century Transportation Committee is the draft proposed legislation that creates a fund for congestion relief to be distributed to eligible local governments and transportation authorities in the form of grants. The draft legislation authorizes and outlines the procedures for local elections to adopt a sales and use tax with proceeds being used to support transportation authorities and systems. It also extends the authority for motor vehicle registration fees as well as the motor vehicle rental charge to additional counties. It is expected that if approved by the 21<sup>st</sup> Century Transportation Committee, this draft legislation will be introduced in the short session of the legislature.

The Durham-Chapel Hill-Carrboro Metropolitan Planning Organization supports legislation that provides funding or encourages public transportation initiatives at the federal, state or local level. This draft legislation is seen as a positive step for meeting the adopted missions and goals of the 21<sup>st</sup> Century Committee and is deserving of support.

The basic provisions of the bill authorize several funding options at the local level and the creation of a capital fund at the state level for congestion mitigation. Under the proposed legislation the capital fund would be available to transit systems in the Triangle region of the state. Local funding options include:

1. Increasing vehicle registration fees from the current \$5.00 to \$7.00.
2. Authorizing a motor vehicle rental charge not to exceed 5% in several counties.
3. Authorizing a ½ cent sales tax to be introduced in the three largest urban areas of the state, one of them being the Triangle.
4. The authority to call for a referendum to level a ¼ cent sales tax in selected counties that are contiguous to the three urban areas in the state.

If this legislation is enacted in its current form, the regional transit provider in the triangle area (Triangle Transit) would have the authority to seek a referendum to implement a ½ cent sales tax in the counties of Wake, Orange and Durham. It would be necessary to receive the concurrence of the County Boards of Commissioners in each county in order to offer the referendum. The legislation also requires that a detailed financial plan for the use of the sales tax be prepared. The sales tax will be levied on only non essential items excluding food and medicine.

While the Metropolitan Planning Organization applauds the efforts to develop this legislation and supports the overall philosophy of the legislation, we believe that the legislation could be improved to ensure that the legislation is a positive step for all transit systems in the Triangle area. Predictable, consistent sources of funding are necessary for transit systems to adequately plan for growth and service improvements for the future. The implementation of this significant legislation should be concerned with the needs of all transit systems in the region.

The following points are offered for consideration as potential improvements to ensure that there is benefit to regional and local transit systems from this legislation.

1. identify a portion of funding for local transit operation that ensures steady, dependable levels of funding to support local bus operations
2. that this source of alternative funding not be used to supplant local funding already committed for public transit
3. include provisions that local jurisdictions that operate public transit systems be required to approve the financial plan.
4. The current structure of this legislation provides opportunities for all transit systems in urban areas to generate a steady stream of predictable funds except for the urban transit systems operating within a regional urban system. As a result the urban systems within the Triangle Transit region find themselves at a disadvantage in that they don't have the ability to introduce legislation to provide long term predictable funding. This is seen as a short fall in the legislation that needs correction.

The Congestion/Intermodal Transfer Fund is a significant piece of legislation that could take great steps to provide long term predictable funding to our state's public transportation systems. We do not have an opportunity to support this type of legislation very often. It is imperative that this legislation be drafted in such a way that it provides a benefit to all transit systems.

27 Part 3. Transportation Authorities.

28 **"§ 105-510.5. Limitations.**

29 A transportation authority may not levy a tax under this Part unless:

- 30 (1) It operates a public transportation system.
- 31 (2) It has developed a financial plan; distributed it to each unit of local  
32 government located within its territorial jurisdiction; and obtained approval of the  
33 financial plan from each unit of local government located within its territorial  
34 jurisdiction that operates a public transportation system. The financial plan  
35 must provide for equitable use of the net proceeds within the special  
36 district created under this Part. The plan may be revised from time to  
37 time with approval of the transportation authority and each unit of local government  
38 located within its territorial jurisdiction that operates a public transportation system.
- 36 (3) The tax is approved by the voters.

37 **"§ 105-510.6. Local election on adoption of sales and use tax- regional public**  
38 **transportation authority.**

39 (a) Special district. A transportation authority may create a special district that  
40 consists of the entire area of one or more counties within its territorial jurisdiction including each county  
41 with a unit of local government that approved the financial plan pursuant to G.S. 105-510.5, and  
42 may levy on behalf of the special district the tax authorized in this section. A special  
43 district created pursuant to this subsection is a body corporate and politic and has the  
44 power to carry out the purposes of this subsection. The board of trustees of the  
transportation authority shall serve, ex officio, as the governing body of a special

1 district it creates pursuant to this subsection. The proceeds of a tax levied under this  
2 section may be used only for the benefit of the special district and only for the purposes  
3 provided in this Article. In the case of a regional transportation authority created  
4 pursuant to Article 27 of Chapter 160A of the General Statutes, the special district may  
5 not include counties other than Forsyth and Guilford Counties.

6 (b) Resolution. –The board of trustees of the authority, with the concurrent vote  
7 of:

8 (1) In the case of a single-county special district, a majority of the county  
9 board of commissioners within the special district

10 (2) In the case of a multi-county special district, a majority vote of all the  
11 county boards of commissioners within the special district

12 may direct the respective county board or boards of elections to conduct an advisory  
13 referendum within the special tax district on the question of whether a local sales and  
14 use tax at the rate of one-half percent (1/2%) may be levied within the district in  
15 accordance with this Part. The election shall be held on a date jointly agreed upon by  
16 the authority and the county board or boards of elections and shall be held in accordance  
17 with the procedures of G.S. 163-287. The board or boards of commissioners shall hold a  
18 public hearing on the question at least 30 days before the date the election is to be held.

19 (c) Ballot Question. – The form of the question to be presented on a ballot for a  
20 special election concerning the levy of a tax authorized by this Article shall be:

21 **' FOR       AGAINST**

22 One-half percent (1/2%) local sales and use taxes, to be used only for public  
23 transportation systems.'

24 **"§ 105-510.7. Levy and collection of sales and use tax – regional public**  
25 **transportation authority.**

26 If the majority of those voting in a referendum held pursuant to G.S. 105-510.6 vote  
27 for the levy of the tax, the transportation authority may, by resolution, levy one-half  
28 percent (1/2%) local sales and use taxes within the special district, in addition to any  
29 other State and local sales and use taxes levied pursuant to law. In determining the  
30 results of the election in a multi-county district, all the counties of the district shall be  
31 considered to be one unit. Except as provided in this Part, the adoption, levy, collection,  
32 administration, and repeal of these additional taxes shall be in accordance with Article  
33 39 of this Chapter. In applying the provisions of Article 39 of this Chapter to this  
34 Article, references to 'this Article' mean 'Part 2 of Article 43 of Chapter 105 of the  
35 General Statutes'. Any repeal of the tax shall be done by the same procedure as its  
36 enactment under section, and a petition for repeal under G.S. 105-473 shall be judged  
37 by the total votes in all three counties.

38 **"§ 105-510.8. Expansion of district.**

39 If a special district established under this Part does not include all the counties in the  
40 territorial jurisdiction of a transportation authority, it may be expanded to include an  
41 additional whole county or counties by joint action of the board of trustees of the  
42 transportation authority and the board of commissioners of the county or boards of  
43 commissioners of the counties to be added, with the approval of the voters in the county  
44 or counties to be added. The procedure for addition of a county or counties shall be the

1 same as for the initial creation of the district, but the referendum shall be held separately  
2 within each of the counties to be added.

3 **"§ 105-510.9. Distribution and use of taxes.**

4 (a) Distribution. – The Secretary shall, on a quarterly basis, allocate to each  
5 transportation authority the net proceeds of the tax levied under this Part within the  
6 special tax district, to be used for the benefit of that district.

7 (b) Use. – A transportation authority must expend the net proceeds distributed to  
8 it in accordance with its financial plan adopted pursuant to G.S. 105-510.5 and use the  
9 net proceeds only for financing, constructing, operating, and maintaining local public  
10 transportation systems. The transportation authority shall use the net proceeds to  
11 supplement and not to supplant or replace existing funds or other resources for public  
12 transportation systems. **All units of local government operating a public transportation system within**  
**the special district shall also use the net proceeds to supplement and not to supplant or replace existing**  
**funds or other resources for public transportation systems.**

**McKeel, Dale**

---

**From:** Dennis Jernigan, P.E. [dwjernigan@dot.state.nc.us]  
**Sent:** Monday, August 06, 2007 2:21 PM  
**To:** Theresa Ellerby  
**Cc:** Doug Taylor, P.E.; Charles Hunt; Andrew P. Young; Katherine E. Hite, EI  
**Subject:** Re: B-4109 Request for Sidewalks, City of Durham

Theresa,

Having reviewed the site, I concur with Doug's comment to keep the design as is. There are only two or three short sections of sidewalk relatively close to this project (1 mile +/-) and those are scattered. Delaying this project to redesign for sidewalk and purchase additional right of way would not be an equitable tradeoff.

"Doug Taylor, P.E." wrote:

> The current design has 4' paved shoulders, 6'-3" offsets on the bridge  
 > and 2 bar metal rail. This allows for bike and ped access. We do not  
 > usually consider sidewalks on shoulder sections because the sidewalk  
 > must be placed behind the ditch to be beyond the clear zone.  
 > This would result in additional right of way that the City of Durham  
 > would be responsible to acquire at no cost to the Department. My  
 > recommendation is to stick with the current design.

> Theresa Ellerby wrote:

> > I received a call from Dale McKeel, Bike and Ped Coordinator for  
 > > Durham's Department of Public Works, regarding B-4109 (replace  
 > > Bridge No. 120 on SR 1303, Pickett Road over Mud Creek in Durham).  
 > > He asked if it's too late to ask NCDOT to consider sidewalks for the  
 > > bridge project.

> > Scoping letters were sent to Durham in January 2004, and the CE was  
 > > signed in November 2005. We received no comments back from Durham  
 > > in response to the scoping letter.

> > Mr. McKeel said the City adopted a new comprehensive plan on  
 > > 2/28/05 and a unified development ordinance on 1/1/06 which requires  
 > > sidewalks within any urban growth area. Pickett Road is considered  
 > > within this type of area. Pickett Road is not proposed for  
 > > multi-lanes in the comprehensive plan.

> > The City has received requests for sidewalks from two private  
 > > schools on Pickett Road. Sidewalks have been installed in areas on  
 > > Pickett Road where new homes have been built recently. He mentioned  
 > > there is a public school within 1 1/2 miles of the bridge as well.

> > Our bike and ped section recommended 4' paved shoulders, which are  
 > > proposed as part of the project.

> > Please advise.

> > Theresa

**RESOLUTION TO REQUEST THAT SIDEWALKS AND ADEQUATE PAVEMENT WIDTH FOR FUTURE BIKE FACILITIES BE INCLUDED IN THE DESIGN OF BRIDGE STRUCTURES IN THE DCHC MPO AREA**

**WHEREAS**, the Durham-Chapel Hill-Carrboro Metropolitan Planning Organization Transportation Advisory Committee (DCHC TAC) recognizes the importance of a balanced transportation network to the economic and social well-being of the community; and

**WHEREAS**, the DCHC MPO 2030 Long Range Transportation Plan and locally adopted plans in the DCHC area generally call for sidewalks and bike facilities along roadways; and

**WHEREAS**, there are numerous examples of bridges and culverts in the DCHC area that do not provide adequate sidewalk and bicycle facilities and present a barrier to pedestrian and bicycle travel, and, since such structures have an average lifespan of 50 years or longer, it may be many years before they are replaced; and

**WHEREAS**, development is rapidly occurring in Orange, Durham, and Chatham counties and areas that appear to be rural are seeing increases in development and citizens are demanding bicycle and pedestrian facilities; and

**WHEREAS**, the North Carolina Board of Transportation has adopted a resolution stating that bicycling and walking accommodations shall be a routine part of the North Carolina Department of Transportation's planning, design, construction, and operations activities; and

**BE IT THEREFORE RESOLVED** that the Durham-Chapel Hill-Carrboro Metropolitan Planning Organization Transportation Advisory Committee adopts as policy that the standard design for all bridges and culverts constructed by NCDOT in the DCHC area will include sidewalks on both sides and adequate pavement width for the future provision of bicycle facilities, and that any deviation from this standard design on a particular bridge or culvert shall be made only after written consultation and concurrence from the DCHC MPO and all affected local governments.

---

TAC Chair

STATE of: North Carolina  
COUNTY of: \_\_\_\_\_

I, \_\_\_\_\_, a Notary Public of \_\_\_\_\_ County, North Carolina do hereby certify that \_\_\_\_\_ personally appeared before me on the day of \_\_\_\_\_, 2007 to affix her signature to the foregoing document.

---

Notary Public for the State of NC  
Residing at: \_\_\_\_\_  
My commission expires \_\_\_\_\_

(Seal)

## Farrington Road Corridor Study: Project Update




Presentation to the DCHC MPO Technical Coordinating Committee  
February 15, 2008

Maple Hills and Associates, Inc.

## Agenda

- Project Overview
- Project Schedule
- Issues and Analysis
- Scenario Planning
- Next Steps



Presentation to the DCHC MPO Technical Coordinating Committee  
February 15, 2008

Maple Hills and Associates, Inc.

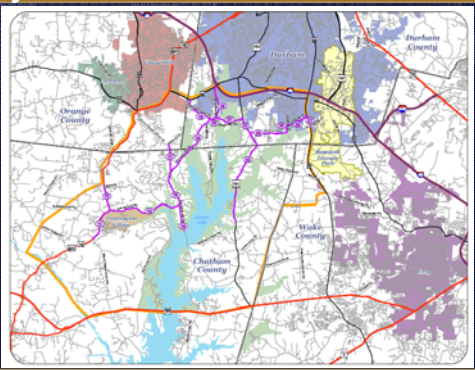
## Project Overview

- DCHC desires assessing and mitigation of existing and future congestion on Farrington Road corridor
- Analysis uses combination of travel demand modeling (TransCAD) and land use/policy modeling (CommunityViz)
- Desired outcome is recommended improvements and land use policy recommendations

Presentation to the DCHC MPO Technical Coordinating Committee  
February 15, 2008

Maple Hills and Associates, Inc.

## Study Area



Presentation to the DCHC MPO Technical Coordinating Committee  
February 15, 2008

Maple Hills and Associates, Inc.

## Project Schedule

- August – January: Existing Conditions Analysis
- September – February: CommunityViz Model
- February – March: Future Conditions Analysis
- March: Recommended Improvements

Presentation to the DCHC MPO Technical Coordinating Committee  
February 15, 2008

Maple Hills and Associates, Inc.

## Issues and Analysis


- Large areas of undeveloped land in study area
- Jordan Lake is large constraint to development and transportation system
- Surrounding highways (I-40, US 15-501, NC 55, NC 751) have increasing traffic pressure
- Most roads in study area are 2-Lane rural sections
- I-540 will have impact on development in eastern Chatham/Western Wake County

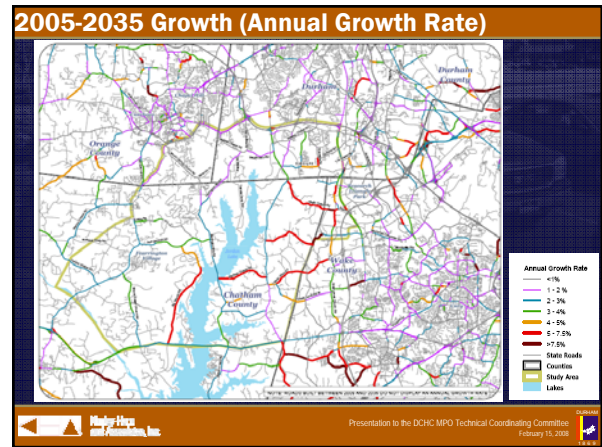
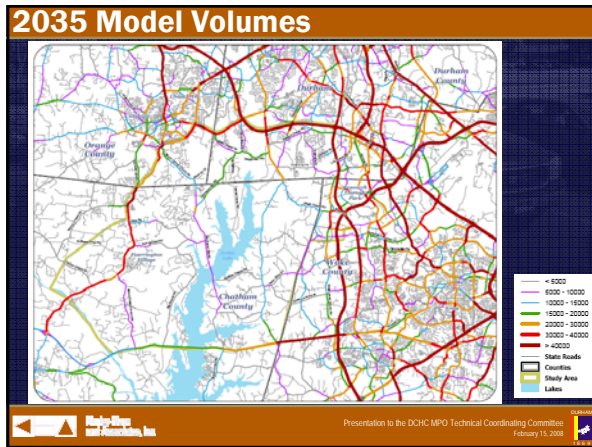
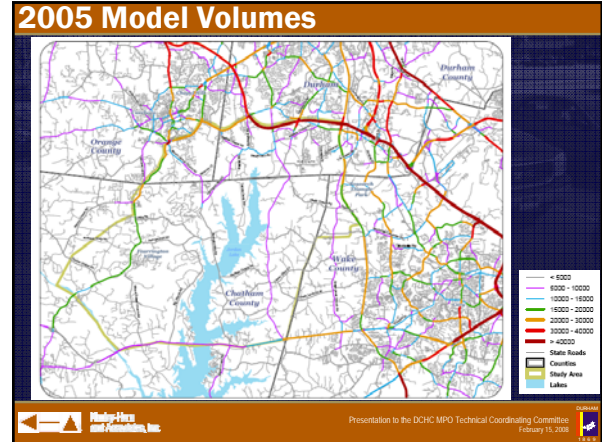
Presentation to the DCHC MPO Technical Coordinating Committee  
February 15, 2008

Maple Hills and Associates, Inc.

### Corridor Analysis


- Will use travel demand model and CommunityViz to test land use scenarios
- “Business-as-Usual” development pattern {sprawl}
- “Balanced” development pattern
- Housing and Employment forecasts from CommunityViz feeds directly into TransCAD


 Presentation to the DCHC MPO Technical Coordinating Committee  
 February 15, 2008




### “Business-as-Usual” Traffic Forecast

Section	Road	From	To	2007 Traffic	2007 LOS	2035 Traffic	2035 LOS
11	US 15-501	Southern PAB	Jack Bennett Road	15,700	A	36,100	B
12	US 15-501	Jack Bennett Road	Northern PAB	17,300	A	35,600	B
13	Jack Bennett Rd	US 15-501	Farrington Point Road	3,300	A	4,900	B
14	Farrington Rd	Southern PAB	Lystra Road	5,900	B	8,800	C
19	Farrington Rd	Stagecoach Road	Ridgefield Drive	8,000	B	8,200	B
20	Farrington Rd	Barbee Chapel Road	Stagecoach Road	7,700	B	19,800	F
15	Farrington Point Rd	Lystra Road	Mt. Carmel Church Rd.	6,000	B	9,700	D
16	Old Farrington Pt Rd	Mt. Carmel Church Rd.	Barbee Chapel Road	4,300	B	16,600	F
17	Mt Carmel Rd	Farrington Mill Road	Downing Creek Pkwy	5,700	B	10,900	D
18	Barbee Chapel Rd	Farrington Mill Road	NC 54	5,300	B	11,300	F
21	Stagecoach Rd	Farrington Road	NC 751	6,700	C	15,600	F
22	NC 751 (Hope Valley Rd)	Stagecoach Road	Scott King Road	9,000	C	22,800	B
23	NC 751 (Hope Valley Rd)	Scott King Road	Southern PAB	10,900	D	17,400	F
24	Scott King Road	NC 751	Granddale Drive	1,700	A	4,000	B
25	Granddale Dr	Scott King Road	Sedwick Road	4,000	B	5,500	B
27	NC 55	Sedwick Road	Alexander Drive	15,400	B	44,800	E


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 February 15, 2008

### Project Recommendations

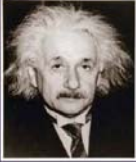
- Short-term transportation improvements
- Long-term transportation improvements
- Land Use policy recommendations


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 February 15, 2008

## Scenario Planning


### Why do scenario planning?

- Explore the “what if’s” of a region’s future
- Consider the tradeoffs between different development scenarios or policy decisions
- Re-frame local growth questions
- Answer what, where, when & how development occurs within a more sustainable region



*“We cannot solve our problems with the same thinking we used when we created them”*

Source: Renaissance Planning Group, 2007





Presentation to the DCHC MPO Technical Coordinating Committee  
February 15, 2008

## Scenario Planning

### What to put *where*...*when*.






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## Scenario Planning



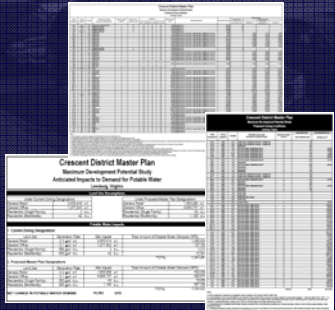





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February 15, 2008

## Scenario Planning

### The Old Way:

- Staff exercise
- Map “take-offs”
- Spreadsheet format
- Static alternatives
- Time intensive



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February 15, 2008

## Scenario Planning

### The New Way:

- Community exercise
- GIS database
- Visual / statistical analysis
- Dynamic updates
- Quick results







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February 15, 2008

## Community Viz Software


### What is it?



A decision support software that evaluates competing future land use scenarios under consideration by a community.



### Benefits:

- Time savings
- Local context
- Side-by-side comparisons
- Public involvement tool
- Quick updates
- Becomes new planning tool for the MPO








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## Community Viz Software

### How does this link to the regional travel demand model?


- SAFETEA-LU requirements
- Micro vs. macro analysis
- TransCAD Interface (GISDK scripts)
- Database management
- NCDOT pilot project





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 February 15, 2008

## Community Viz Software

### Who's Using CV Software?




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## Scenario Planning

### Farrington Road CV Analysis

**Trend Analysis**

- Existing development patterns / policy initiatives
- Population projections

**Carry Capacity Analysis**

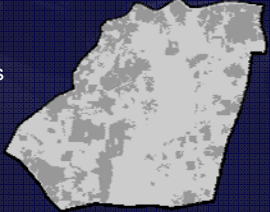
- Highly-constrained areas for development


**Land Suitability Analysis**

**Full Build-Out Potential**

**Future Year Scenarios**

- How will we grow?
- Where will we grow?
- Evaluate the alternatives



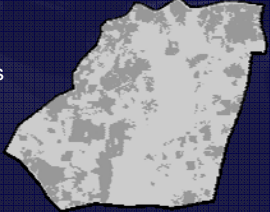

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## Scenario Planning

### Farrington Road CV Analysis

### Trend Analysis:

- Existing Dev. Patterns
  - GIS data
  - Aerial photography
  - Windshield surveys
- Development Characteristics
- Policy Initiatives
- Population Projections (SE Data)



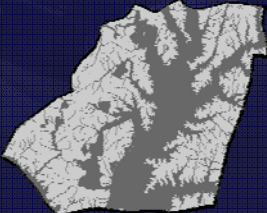

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## Scenario Planning

### Farrington Road CV Analysis

### Carrying Capacity:

- Permanent Conservation Areas
- Major Water Bodies
- Wetlands (NWI)
- Flood Hazard Areas
- SWIM Buffers
- Sig. Natural Heritage Areas
- Voluntary Ag Districts



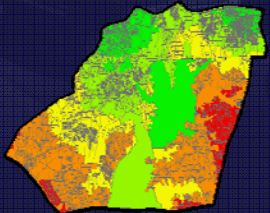

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## Scenario Planning

### Farrington Road CV Analysis

### Land Suitability:

- Water Service Area
- Sewer Service Area
- Proximity to Existing Activity Centers



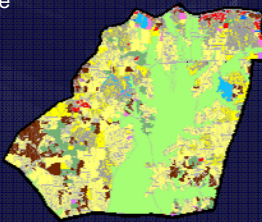

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## Scenario Planning

Farrington Road CV Analysis

### Full Build-Out Potential:

- Reflects adopted plans, programs, and policies for the MPO member jurisdictions
- Full build-out is not tied to a specific horizon year



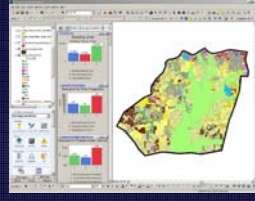

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## Scenario Planning

Farrington Road CV Analysis

### Future Year Scenarios:

- Two scenarios for study:
  - business-as-usual
  - compact development pattern
- CV allocation tool
- 2030 planning year horizon
- Measures of effectiveness
  - transportation
  - water / sewer
  - schools
  - parks
  - police / fire




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## Community Viz Software

Time to take a test drive...

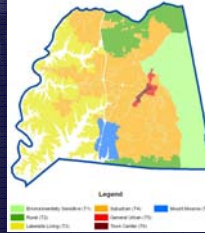



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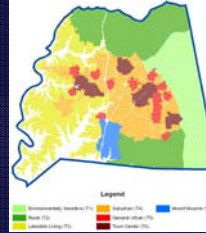
## Next Step for Scenario Planning

Mooresville Project Example


### Evaluate Growth Scenarios:



Traditional Dev. Patterns



Paradigm Shift

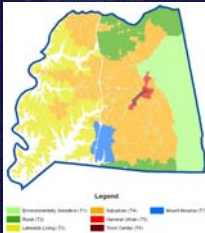

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## Next Step for Scenario Planning

Mooresville Project Example

### Traditional Dev. Pattern

- Maintain adopted plans, programs, & policies
- Development characteristics:
  - low densities & intensities
  - separation between complementary land uses
  - Absence of pedestrian & bicycle infrastructure in the study area



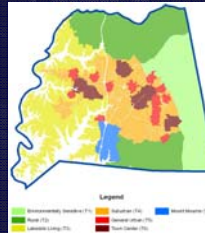

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 February 15, 2008


## Next Step for Scenario Planning

Mooresville Project Example

### Paradigm Shift

- Change in planning philosophy
- Development characteristics:
  - direct growth toward activity centers
  - encourage close-by, complementary land uses
  - Significant improvements to pedestrian, bicycle, & transit infrastructure





 Presentation to the DCHC MPO Technical Coordinating Committee  
 February 15, 2008

### Next Step for Scenario Planning

Mooresville Project Example

#### Scenario Planning Results

Urban Form Category	Sprawl Development Scenario		Compact Development Scenario		Change
	Acres	Percentage	Acres	Percentage	Acres
Environmentally Sensitive Area	11,919	20%	11,857	20%	-62
Rural	8,247	14%	17,627	29%	9,375
Lakeville Living	12,234	20%	11,877	20%	-357
Suburban	25,287	42%	11,590	19%	-13,697
General Urban	387	1%	2,453	4%	2,066
Urban Center	195	0%	2,870	5%	2,675
Mount Mourne Special District	1,829	3%	1,829	3%	0
<b>Total</b>	<b>60,098</b>	<b>100%</b>	<b>60,098</b>	<b>100%</b>	<b>0</b>



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### Next Step for Scenario Planning

Mooresville Project Example

#### Scenario Planning Results

Measure of Effectiveness (MOE)	Sprawl Development Scenario	Compact Development Scenario	Percent Change
Total Person Trips (1,000s)	511	521	1.92%
Total Population	110,269	110,204	-0.06%
Person Trips per Person	4.64	4.73	1.93%
Walk/Bike Trips	7,303	8,100	9.84%
Vehicle Miles Traveled (1,000s)	4,020	3,928	-2.44%
Vehicle Miles Traveled per Person	36.5	35.6	-2.26%
Vehicle Hours Traveled (1,000s)	108	104	-3.65%
Vehicle Hours Traveled per Person	0.98	0.94	-3.76%
Average Vehicle Speed (mph)	37.2	37.8	1.59%
Vehicle Miles Traveled @ LOS E (1,000s)	942	835	-12.81%
% Vehicles Miles Traveled Over Capacity	23%	21%	-2.68%


 Presentation to the DCHC MPO Technical Coordinating Committee  
 February 15, 2008

# Questions?


 Presentation to the DCHC MPO Technical Coordinating Committee  
 February 15, 2008

## **Division 5 One-on-One Meeting FY 2008-2015 Transportation Improvement Program**

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### Agenda

- 1. 2008-2015 TIP Items for Discussion**
    - a. General Funding and Design Issues**
    - b. Major Project Schedules and Funding**
    - c. Project Design**
    - d. Project Study and Project Management Requests**
- 

### **1. 2008-2015 TIP Items for Discussion**

The DCHC MPO has reviewed the 2008-2015 Draft STIP and developed the following list of issues for discussion. The MPO is developing the 2008-2015 MTIP which will be approved in late spring 2008.

#### **a. General Funding and Design Issues**

##### **1. Need additional funding for transportation**

The DCHC MPO has only two new highway or bicycle/pedestrian projects in Division 5 funded in the draft FY 2008-2015 STIP (I-5104 and B-4943, neither of which is in our Regional Priority List) while population and employment continue to grow. It is imperative the NCDOT and the General Assembly work to increase transportation funding for the State's urban areas.

##### **2. Prioritize funding for bicycle, pedestrian, and transit projects**

The DCHC MPO strongly supports multi-modal transportation. Many of the MPO's top priorities are bicycle, pedestrian, and transit projects (see Regional Priority List). Many of the traditional funding sources for these projects have disproportionately been the target for rescissions. We understand that recent federal legislation now requires that rescissions be proportionately distributed among funding programs. In addition to the traditional funding sources for these projects, the DCHC MPO would like these projects to receive funds traditionally used for highway projects such as STP funds. Bicycle/pedestrian projects are typically far less costly than highway projects. With so little revenue available for new projects, it would be a good opportunity to use limited resources on more less expensive bicycle/pedestrian projects.

##### **3. All highway projects**

NCDOT has changed its approach to highway design from accommodating motor vehicles only to providing for a multi-modal transportation system. However, on roadway projects that include widening and multi-modal facilities, the project

descriptions in the TIP continue to say “widen to multi-lanes” with no mention of multi-modal facilities. The DCHC MPO continues to believe that the TIP would better communicate to the public and to NCDOT departments the actual project scope if the project descriptions said “widen to multi-lanes and include bicycle, pedestrian, and transit facilities” where appropriate.

## **b. Major Project Schedules and Funding**

### **4. U-0071 (East End Connector)**

The DCHC MPO is concerned about the schedule delay and unfunded cost increase for U-0071. The project cost increased from \$99,292,000 in the FY 2007-2013 STIP to \$161,792,000 in the draft FY 2008-2015 STIP. None of the \$62,500,000 cost increase is funded. In addition, the first year for construction was delayed two years from 2012 to 2014. This project is Durham’s highest priority and would greatly improve safety, congestion, and access through Durham. The environmental document for U-0071 is on schedule to be complete in 2008. Public awareness of the project is high due to several well-attended community meetings and the formation of the Ad Hoc Committee. The DCHC MPO requests that construction for this project not be delayed and that it be fully funded in the final STIP.

### **5. U-3808 (NC 55/Alston Avenue, NC 147 to Holloway St.)**

The DCHC MPO is concerned about the design of U-3808. A recommendation is pending Durham City Council action.

### **6. New Project (Fayetteville Road, Woodcroft Parkway to Riddle Rd.)**

A recommendation is pending Durham City Council action.

### **7. I-5104/R-2000 (I-540/I-40 Interchange Improvements)**

The DCHC MPO would like the bottleneck at the ramp from NC 147 south to I-40 east addressed in addition to this project. U-5104, which primarily serves commuters from Wake County to RTP, is the only new highway project funded in Durham County and it is not on the MPO’s Regional Priority List.

### **8. DATA Buses**

DATA has recently had difficulty meeting its peak bus pullout due to mechanical problems with its bus fleet. The draft FY 2008-2015 STIP includes 11 replacement buses for DATA in FY 2011. DATA requests that the replacement schedule be accelerated and the number of replacement buses be increased. DATA requested 12 expansion buses in 2009 and 31 replacement buses in 2012 in the MPO’s Regional Priority List.

### **9. U-4763B (Triangle Parkway)**

The DCHC MPO continues to be concerned about the provision of gap funding for the Triangle Parkway and the design of the project. The Triangle Parkway is not the MPO’s highest priority highway project and thus the MPO objects to any

diversion of funds from any higher priority projects to the Triangle Parkway. The DCHC MPO urges the NCTA and the General Assembly to identify new sources of revenue to fill the funding gap. In addition, the DCHC MPO urges the NCTA to include transit facilities in the design of the project and consider free use of the facility by buses, vanpools, and carpools (3+). Planned and existing bicycle and pedestrian facilities on all Y-lines should be accommodated by the project design. Other local access issues related to the Triangle Parkway have also been raised by citizens.

**10. U-4011 (S. Miami Blvd., Methodist St. to Bethesda St.)**

The draft STIP incorrectly shows \$2,861,000 in STP-DA funding for this project in FY 2008. The DCHC MPO has only approved the use of \$1,874,000 in STP-DA funding for this project. The DCHC MPO objects to this increase in STP-DA funding that has not been approved by the MPO. The DCHC MPO is in the process of deciding how to allocate its STP-DA funds for FY 2008-2015. Increasing the STP-DA funding for U-4011 is not being considered. STP-DA funding will be approved by the MPO in April 2008 and forwarded to NCDOT for inclusion in the final STIP.

**c. Project Design**

**11. U-3804 (Hillandale Rd., I-85 to Carver St.)**

A letter was sent to NCDOT outlining the DCHC MPO's concerns regarding the design of this project in January 2008. The DCHC MPO requests that NCDOT work with the adjoining property and business owners to develop a solution which safely accommodates traffic traveling along Hillandale Road, provides good access to properties in the area, and addresses other concerns that have been raised.

**d. Planning Study and Project Management Requests**

**12. U-4720 (US 70) and U-4721 (Northern Durham Parkway)**

With the East End Connector (U-71) included in the draft FY 2008-2015 TIP, it is important to initiate the planning process for the next priority Highway Trust Fund projects in Durham – US 70 and the Northern Durham Parkway. Because the design of one of these Highway Trust Fund projects could affect the design of the other, it is important that the planning process study these two projects together.

**13. C-4402 (NC 54 Bicycle Improvements)**

NCDOT previously agreed to manage EB-4707 (Old Durham-Chapel Hill Road Bicycle and Pedestrian Improvements) if the City of Durham would agree to manage C-4402. However, the DCHC MPO requests that NCDOT reconsider managing C-4402. NC 54 is a major State route. The MPO and the City of Durham do not have the resources to manage a project of this magnitude on the State system.

**14. U-2405 (M. L. King Jr. Parkway and NC 55 Interchange)**

With the completion of M. L. King Jr. Parkway from US 15-501 to NC 55, it is appropriate to complete the last link of this important project from NC 55 to Cornwallis Road to serve Research Triangle Park. The TAC would like to consider lower cost alternatives to the \$25.8 million unfunded interchange identified in the draft FY 2008-2015 STIP. The DCHC MPO requests that NCDOT provide information regarding the feasibility study re-evaluation in progress.

**15. U-4724 (Cornwallis Rd., S. Roxboro Rd. to Chapel Hill Rd.)**

This project is currently funded using the MPO's STP-DA funds. Additional funding may be needed depending on a revised cost estimate.

## **Division 7 One-on-One Meeting FY 2008-2015 Transportation Improvement Program**

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### **Agenda**

#### **FY 2008-2015 TIP Items for Discussion**

- a. General Funding and Design Issues**
  - b. Project Schedules and Funding**
  - c. Funding for Transit Planning**
- 

#### **FY 2008-2015 TIP Items for Discussion**

The DCHC MPO has reviewed the FY 2008-2015 Draft STIP and developed the following list of issues for discussion. The MPO is developing the FY 2008-2015 MTIP which will be approved in late spring/early summer 2008.

#### **a. General Funding and Design Issues**

##### **1. Need additional funding for transportation**

The DCHC MPO is pleased that many of the cost increases on previously funded projects in Division 7 were funded in the draft FY 2008-2015 STIP and that several priority projects were accelerated (U-4704 – Chapel Hill/Carrboro Signal System, U-0624 – NC 86/South Columbia Street). However, the DCHC MPO has no new highway or bicycle/pedestrian projects in Division 7 funded in the draft FY 2008-2015 STIP while population and employment continue to grow. It is imperative the NCDOT and the General Assembly work to increase transportation funding for the State's urban areas.

##### **2. Prioritize funding for bicycle, pedestrian, and transit projects**

The DCHC MPO strongly supports multi-modal transportation. Many of the MPO's top priorities are bicycle, pedestrian, and transit projects (see Regional Priority List). In addition, the Town of Chapel Hill recently updated its long range transit plan. This document recommends a significant expansion of service for which additional funding is needed. The DCHC MPO is concerned that many of the traditional funding sources for bicycle, pedestrian, and transit projects have disproportionately been the target for rescissions. In fact, we understand that recent federal legislation now requires that rescissions be proportionately distributed among funding programs. Therefore, the DCHC MPO has two requests to increase the resources for multi-modal projects. First, in addition to the traditional funding sources, the DCHC MPO would like these projects to receive funds traditionally used for highway projects such as STP funds. Second, bicycle/pedestrian projects are typically far less costly than highway projects. Thus, with so little revenue available for new projects, we believe that the limited

resources should be used to fund a greater number of the less expensive bicycle/pedestrian projects.

3. **All highway projects (especially R-2825, U-2803, U-3306, U-2805, U-2909)**  
 NCDOT has changed its approach to highway design from accommodating motor vehicles only to providing for a multi-modal transportation system. However, on roadway projects that include widening and multi-modal facilities, the project descriptions in the TIP continue to say “widen to multi-lanes” with no mention of multi-modal facilities. The DCHC MPO continues to believe that the TIP would better communicate to the public and to NCDOT departments the actual project scope if the project descriptions said “widen to multi-lanes and include bicycle, pedestrian, and transit facilities” where appropriate.

#### **b. Project Schedules and Funding**

4. **FS-0307A (Mason Farm Rd. Relocation)**  
 Neither the DCHC MPO nor the Town of Chapel Hill requested this project. The Town requests that the project be removed from the FY 2008-2015 TIP. This project should be reviewed by the Town and the DCHC MPO and have more public input before it is programmed in the TIP.
5. **Bolin Creek Greenway (NC 86 to Umstead Park in Chapel Hill)**  
 The DCHC MPO requests that this project be programmed in the FY 2008-2015 TIP. It is estimated to cost \$1,500,000. This is the Chapel Hill section of the Bolin Creek Greenway. The Carrboro section of the Bolin Creek Greenway is already programmed in the FY 2008-2015 TIP (EL-4994).
6. **I-0305 (I-85 widening)**  
 The DCHC MPO would like to change the phase descriptions to prioritize the rebuilding of interchanges at NC 86, SR 1009 (Old NC 86), and US 70.  
 Phase A: Rebuild interchanges at NC 86, SR 1009 (Old NC 86), and US 70.  
 Phase B: Widening  
 We also request a status report on the environmental study for this project.
7. **U-3306 (Weaver Dairy Road improvements)**  
 The DCHC MPO requests that NCDOT fully fund this project with STP funds due to a change in the purpose of the project. A previous version of the Weaver Dairy Road project was focused on increasing capacity. For this previous version, the DCHC MPO had earmarked \$566,000 of STP-DA funds for specific bicycle, pedestrian, and transit enhancements. The current design of the project is less focused on increasing capacity and is now primarily a bicycle, pedestrian, and transit improvement. Since the bicycle, pedestrian, and transit improvements are now the primary purpose of the project, the DCHC MPO’s STP-DA funds should not be needed. The 2007-2013 TIP reflected this with all of the \$10,800,000 for construction funded with STP funds. In the draft FY 2008-2015 STIP, this project is funded with \$10,092,000 of STP, \$566,000 STP-DA, and \$142,000

from the Town of Chapel Hill for construction, but we believe that all of the resources should come from STP funds.

**8. B-4218 (Bridge No. 108 over New Hope Creek on SR 1730 Turkey Farm Rd.)**

The DCHC MPO and Orange County request that NCDOT proceed with this bridge project with the utmost attention to the environmentally sensitive nature of this location. This reach of New Hope Creek is home to six species listed with the North Carolina Natural Heritage Program, three of which are designated as endangered. In addition, it is adjacent to conservation land in Duke Forest and land owned by the Triangle Land Conservancy. NCDOT has previously responded to concerns of the local jurisdictions and citizens regarding the design of the US 15-501 bridge over New Hope Creek in Durham County based on the uniqueness of the corridor.

**9. EB-5021 (Estes Dr., Greensboro St. to Seawell School Rd.)**

The FY 2007-2013 STIP programmed \$650,000 for this project. The draft FY 2008-2015 STIP programs \$480,000. The DCHC MPO and the Town of Chapel Hill request that the difference, \$170,000, be reserved for other DCHC MPO projects such as the Bolin Creek Greenway or potential cost overruns on EB-4707 (Old Durham-Chapel Hill Road).

**10. U-3100B (Old Fayetteville Rd., NC 54 to Stroud Lane)**

The draft FY 2008-2015 STIP programs \$300,000 for right-of-way acquisition in 2012. The DCHC MPO and the Town of Carrboro request that this project be accelerated and that construction be fully funded. This project is ranked high on the DCHC MPO's Regional Priority List and is a top priority for the Town of Carrboro.

**c. Funding for Transit Planning**


**11. Special Transit Advisory Commission (STAC) Recommendations**

The Special Transit Advisory Commission (STAC) is a citizens' advisory committee established by the DCHC MPO and the Capital Area MPO to make recommendations concerning major transit investments in the Triangle. The STAC will soon be forwarding its recommendations to the DCHC MPO and the Capital Area MPO so that they may be considered for inclusion in the 2035 Long Range Transportation Plans for the two MPOs. Any major transit investment will require extensive planning and design work. There are two placeholders for alternatives analysis, engineering, and design for major transit investments in the draft FY 2008-2015 TIP (TE-4903 and TE-4706B). The DCHC MPO requests that NCDOT revise these projects as needed for the final FY 2008-2015 TIP based on the forthcoming STAC recommendation. DCHC MPO staff will provide specific details on these revisions in late March.

### Triangle Air Quality Conformity and the New Federal Ozone Standard

- On December 26, 2007, the Triangle was redesignated from a “non-attainment” to a “maintenance” area for ozone pollution.
- On March 12, 2008, the USEPA made the 8-hour ozone standard more stringent; lowering it from the current 0.084 parts per million\* to 0.075 parts per million (or, from 84 to 75 parts per billion).
- Eventually, Long-Range Transportation Plans (LRTPs) and Transportation Improvement Programs (TIPs) will need to show conformity with this new standard.

\* Technically, the old standard was 0.08 parts per million, but with a rounding convention, 0.085 ppm reflected the lowest violating value; the new standard was established to 3 significant digits, so 0.076 ppm will be the lowest violating value.

 <http://www.epa.gov/groundlevelozone/actions.html#mar07s>  
Office of Air Quality Planning and Standards

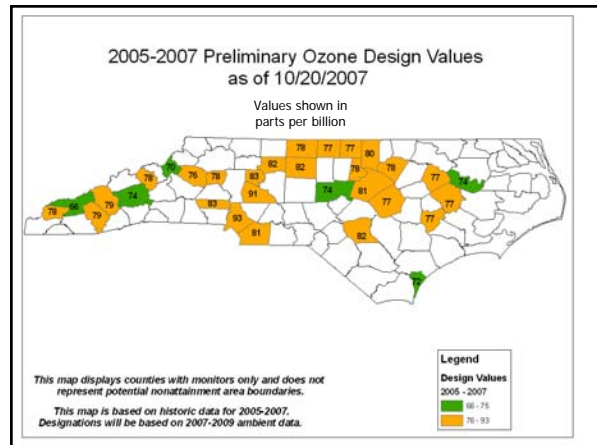
### Expected Implementation Timeline for Revised Ozone NAAQS

Milestone	Date
Signature—Final Rule	March 12, 2008
State Designation Recommendations to EPA	No later than March 12, 2009
Final Designations	No later than March 12, 2010*
Attainment Demonstration SIPs Due	2013*
Attainment Dates	2013-2030 (depends on severity of problem)

\* In the event the Administrator has insufficient information to promulgate the designations by March 12, 2010, the date of final designations may be extended up to one year, but no later than March 12, 2011. SIPs will be due three years from final designations.

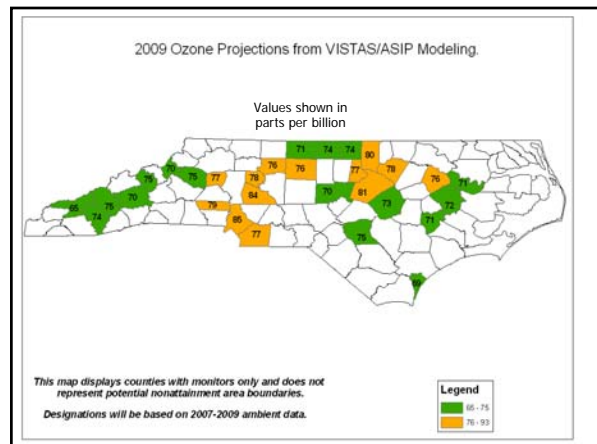
### Triangle Air Quality Conformity and the New Federal Ozone Standard

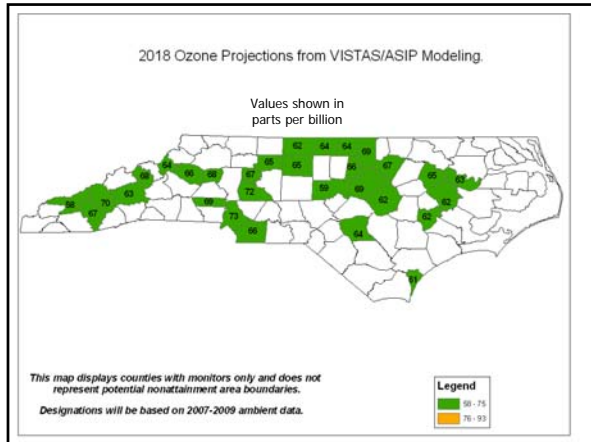
- The basic steps (and estimated timing) are:
  - State of NC recommends new non-attainment areas (3-2009)
  - EPA establishes new non-attainment areas (3-2010)
  - New TIPs and LRTPs subject to new standards (2011)
  - State of NC sets new motor vehicle emissions budget as part of developing attainment State Implementation Plan (SIP) (2013)
- Based on the new standard and the maps which follow, the Triangle will likely be ozone non-attainment again.
- MPOs, RPOs and NCDOT can provide input on the designation of non-attainment areas and the development of SIP motor vehicle emission budgets
  - Note that “partial county” designations, as with Chatham County most recently, may not be included in the next round.



### Triangle Air Quality Conformity and the New Federal Ozone Standard

- What this likely means for the Triangle is:
  - The 2009-15 TIP conformity, due by October 1, 2008, is subject to the “old” 0.085 ppm standard (current emission budgets)
  - The 2035 LRTPs, with conformity due by June 15, 2009, will be subject to the “old” 0.085 ppm standard (current emission budgets)
  - The 2011-17 TIP, with conformity due by October 1, 2010 and which must be a conforming subset of the 2035 LRTP, will be subject to the “old” 0.085 ppm standard (current emission budgets)
  - The 2040 LRTPs and 2013-17 TIPs would probably be the first conformity reports where the new standard would be applied.





**EPA** United States Environmental Protection Agency <http://www.epa.gov/groundlevelozone/actions.html#mar07s> Office of Air Quality Planning and Standards

### Revised Ozone AQI

- EPA is changing the Air Quality Index (AQI) to reflect the new primary standard
- The AQI is EPA's color-coded tool designed to inform the public about daily air pollution levels in their communities
- EPA is adjusting the 100-level, which is the upper end of the "moderate" category, to equal the new 0.075 ppm standard, and making proportional changes to other AQI values
- EPA encourages the States to use the new AQI breakpoints for air quality forecasting by the beginning of ozone season. In many areas this date is May 1, 2008
- NC will begin its ozone forecasts on April 15 in 2008 and April 1 in 2009

Category	AQI Value	1997 0-hour (ppm)	2008 0-hour (ppm)
Good	0-50	0.000-0.064	0.000-0.039
Moderate	51-100	0.065-0.084	0.000-0.075
Unhealthy for Sensitive Groups	101-150	0.085-0.104	0.076-0.095
Unhealthy	151-200	0.105-0.124	0.096-0.115
Very Unhealthy	201-300	0.125-0.374	0.116-0.374
Hazardous	301-400	No Change	No Change
Very Hazardous	401-500	No Change	No Change

Note that this change will mean that days that were, e.g., at the high end of "Code Orange" before would become "Code Red," etc., so that year-to-year comparisons of the number of ozone alert days would not be consistent.

## Triangle Air Quality Conformity and the New Federal Ozone Standard

- For further information, contact:
  - General Triangle transportation and air quality conformity issues:  
John Hodges-Copple  
Triangle J Council of Governments  
919-558-9320 -- johnhc@tjcog.org
  - New ozone standard, non-attainment designations and SIP motor vehicle emission budget development:  
George Bridgers  
NC DENR -- Division of Air Quality  
919-715-6287 -- George.Bridgers@ncmail.net
  - Federal transportation conformity requirements:  
Edward Dancausse  
Federal Highway Administration  
919-747-7026 -- Edward.Dancausse@fhwa.dot.gov

## MEMORANDUM

**To:** Transportation Advisory Committee (TAC)  
DCHC MPO

**From:** DCHC MPO Lead Planning Agency

**Date:** April 9, 2008

**Subject:** **Lead Planning Agency (LPA) Staff Report**

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This memorandum provides a summary status of tasks for projects in the FY 2007-2008 Unified Planning Work Program.

- ✓ Indicates that task is complete.
- Indicates that task is ongoing or not complete.

### **2007-08 Unified Planning Work Program (UPWP) – Projects**

#### **Long Range Transportation Plan (LRTP) / Comprehensive Transportation Plan (CTP) Update**

- ✓ Draft schedule – August 2006
- ✓ Release SE Data for public comment – January 2007
- ✓ Release Goals and Objectives for public comment – July 2007
- ✓ TAC approve SE Data – September 2007
- ✓ Goals and Objectives – TAC hold public hearing, September 2007, and approve, October 2007.
- ✓ TAC approve Targets – February 2008
- ✓ TAC review Deficiency Analysis – March 2008
- TAC review Land Use Scenarios – May 2008
- TAC review LRTP Alternatives – May 2008

#### **Travel Time Survey/Speed Study**

- ✓ Consultant has been selected for the survey.
- ✓ Scoping and contract negotiations completed.
- ✓ Field reconnaissance and data collection – in progress.
- Field survey completed. Analysis in progress

#### **GIS/Data Integration and Automation**

- ✓ Issue RFQ – September 11, 2006
- ✓ Non-mandatory pre-proposal conference – September 25, 2006
- ✓ Receive written proposals – October 15, 2006
- ✓ Consultant short list by October 23-27, 2006

- ✓ Consultant short list interviews/references check and city issues Notice of Intent to Award a Contract by October 30-November 13, 2006
- ✓ Contract negotiation and scoping in progress
- ✓ Council approves contract – August 13, 2007
- ✓ City issues contract
- ✓ Notice to proceed
- ✓ Kick-off meeting held in October
- ✓ Project underway

#### **Land-use Model development**

- ✓ Issue RFQ – August 7, 2006
- ✓ Pre-proposal conference – August 29, 2006
- ✓ Receive written proposals – September 8, 2006
- ✓ Consultant short list – September 13-22, 2006
- ✓ Consultant short list interviews/references check and City issues notice of intent to award a contract – September 25-29, 2006
- ✓ Contract negotiation and scoping completed
- ✓ Council approves contract March 5, 2007
- ✓ City issues contract – March 25, 2007
- ✓ Notice to proceed – March 25, 2007
- Study underway – completion December 2008

#### **Non-Motorized Model development**

- ✓ Issue RFQ – August 21, 2006
- ✓ Non-mandatory pre-proposal conference – September 6, 2006
- ✓ Receive written proposals – September 21, 2006
- ✓ Consultant short list – September 25-29, 2006
- ✓ Consultant short list interviews/references check and City issues notice of intent to award a contract – October 2-6, 2006
- ✓ Contract negotiation and scoping completed
- ✓ Council approves contract – March 5, 2007
- ✓ City issues contract – March 25, 2007
- ✓ Notice to proceed – March 25, 2007
- Study underway –completion December 2008

#### **ITS Deployment Plan**

- Two Triangle regional stakeholder coordination meetings held.
- ✓ Update of ITS short range strategies for the 2007-2013 TIP.
- ✓ Update of 2007-2010 ITS project – December 2006
- ✓ Request for funding from NCDOT
- ✓ Draft scope of services and Request for Proposals.
- Consultants selection in spring of 2008
- Notice to proceed in spring 2008
- Completion of Project expected in spring of 2009.

#### **Farrington Road/Stagecoach Road Corridor Study**

- This study would involve the following tasks:
  1. Data collection and analysis
  2. Traffic circulation plan (including a collector street system plan)
  3. Sub-area modeling analysis and forecast of future demand
  4. Alternative evaluation
  5. Recommendation
- Kimley Horn and Associates is the consultant
- Data collection underway
- Steering Committee proposed
- Completion of study expected in January
- Integration in the 2035 LRTP
- Draft report due in January 2008

#### **MPO Collector Street Plan**

- ✓ Supplemental Agreement with Kimley Horn and Associates
- ✓ Data collection underway
- Completion of study and integration with the 2035 LRTP in Spring 2008

#### **Regional Transit Infrastructure Blueprint**

- ✓ Establish and convene sponsors and partners teams, agree on detailed task list, responsibilities, products, begin infrastructure and corridor descriptions; begin investment principles - summer 2006
- ✓ Finish corridor and infrastructure descriptions; finalize principles fall 2006
- ✓ Begin land use, travel and cost analysis - winter 2006
- ✓ Finish land use, travel, cost analysis - spring 2007
- Conclude work, issue Blueprint, implement tracking mechanism - summer 2007

#### **Chapel Hill/Carrboro/UNC Long Range Transit Plan**

- Project underway
- Projected to be completed in spring of 2008

### **Unified Planning Work Program (UPWP) – Continuing Projects**

#### **Greenhouse Gas (GHG) Emission Inventory and Action Plan**

- ✓ Execute contract and give consultant Notice-to-Proceed – March 2006 (delayed due to contract issues)
- ✓ Formation of Technical Committee finalized in February 2006.
- ✓ Formation of stakeholder committee (Advisory Committee) finalized in February 2006.
- ✓ Kick off meeting for the study held March 23, 2006
- ✓ Establish Project Team List serve in February 2006
- ✓ Base Year data Collection and Information Gathering to be completed in March-August 2006 (Durham – complete; Orange – in progress).

- ✓ Data Analysis and Projection likely to be completed in (Durham - August 2006; Orange - ?).
- ✓ Determine and quantify historic and existing measures likely to be completed in July-August 2006.
- ✓ Identify new measures to be completed in August 2006.
- ✓ Criteria Air Pollutant (CAP) Analysis anticipated to be completed in September 2006.
- ✓ Identify GHG target and model reduction targets anticipated to be completed in February-March 2006.
- ✓ Formulate Action Plan anticipated to be completed in March 2007.
- ✓ Recommend reduction targets, strategies and action plan anticipated to be done by March 2007.
- ✓ Draft Plan finalized in June 2007.
- ✓ Durham Public Forum - June 21, 2007
- ✓ Plan Adoption anticipated occurring during fall 2007. Durham City and Durham County approved on September 19, 2007.
- The Orange County plan has been delayed several months beyond the Durham County plan.

#### **Congestion Management System (CMS)/Mobility Report Card**

- ✓ Consultants selected for the study.
- ✓ Data collection for the Mobility Report Card underway
- ✓ Data Collection for the Durham study about 80% complete.
- ✓ Data Collection and field inventory completed.
- Level of Service analysis and draft report completed.
- Development of CMS performance measures and guidelines likely to be completed in winter 2008.
- Evaluation of congestion management strategies and development of cost-effective mitigation measures expected to be done in winter 2008.
- Draft CMS State of System Report likely to be done in winter 2008.
- Public Comment and local review in spring 2008.
- Adoption anticipated in spring/summer 2008.

#### **Travel Demand Model Update – Model Revision to Incorporate FTA New Start Enhancement**

- ✓ Consultant has been selected to assist the Triangle Regional Model (TRM) Service Bureau at ITRE in the model update.
- ✓ Data collection is complete.
- ✓ Migration of model from Tranplan to TransCad has been completed.
- ✓ Phase I (TTA new start model revision) completed in October 2005.
- ✓ Phase II TTA New Start model conversion to TransCad to be completed in August 2006.
- Calibration of 2002 model in TransCad anticipated to be completed in fall 2007.
- Validation of 2002 model against 2005 count data anticipated to be completed in fall 2007.

## **Unified Planning Work Program (UPWP) – Routine and Other Special Projects**

### **MPO Environmental Justice (EJ) and Limited English Proficiency (LEP) Plan Integration**

- Mandated by federal regulations
- Draft plan to be prepared in 2008.

### **Update of the MPO Public Involvement Policy Consistent with SAFETEA-LU**

- ✓ Draft to be ready for fall of 2007.
- ✓ Adopted anticipated in Spring of 2008

### **MPO Expansion for the next LRTP Update**

- ✓ Initiated dialogue with Person County, Granville County, Butner, Roxboro and Pittsboro – July 2006
- ✓ Met with governing bodies of these jurisdictions – September 2006
- MPO expansion and revision of MOU expected to be completed as part of the 2035 LRTP update.

### **Public Outreach for the East End Connector Planning and Environmental Study**

- ✓ LPA working on the Public Involvement and Outreach Program for the East End Connector Planning and Environmental Study (NEPA).
- ✓ Development of mailing list database complete.
- ✓ Received project schedule and time line from NCDOT.
- ✓ Newsletter distributed May 2006
- ✓ Speakers Bureau presentations June 2006 – ongoing
- ✓ First public meeting September 26, 2006
- ✓ Second public meeting – January 30, 2007
- ✓ Alternative 3 selected as LEDPA – June 19, 2007
- ✓ Ad Hoc Committee Meetings – August 9, 2007, August 27, 2007, September 19, 2007, October 10, 2007, November 7, 2007, December 5, 2007
- ✓ Third public meeting December 10, 2007, Orange Grove Missionary Baptist Church
- Environmental Study expected completion - Spring 2008

**NCDOT PROJECTS UNDER CONSTRUCTION IN DURHAM COUNTY - 4/1/2008**

County	TIP #	Route	Location Description	Contract Amount	Length	Contractor Name	Resident Engineer	RE Ph. #	Contract Completion	Scheduled Progress	Actual Progress	Estimated Completion
Durham, Wake	R-2906A/C	NC-55	WIDENING OF NC-55 FROM NORTH OF US-64 IN WAKE COUNTY TO CORNWALLIS RD.	\$ 34,668,947.33	11.634 miles	Blythe Development Co	Jeff Allen, PE	(919) 678-0444	06/01/2006	100%	100%	COMPLETE
Durham	I-306C	I-85	WIDENING OF I-85 FROM EAST OF COLE MILL RD TO WEST OF BROAD STREET.	\$ 66,628,382.65	3.416 km	Granite Construction Company	Aaron V. Earwood, PE	(919) 220-4680	12/31/2006	100%	99.5%	5/1/2008
DURHAM	U-4010	NC 98	WIDENING OF NC 98 (HOLLOWAY ST) FROM EAST OF US 70 TO EAST OF JUNCTION ROAD	\$ 3,288,207.30	0.369 miles	Triangle Grading and Paving	Cadmus Capehart, PE	(919) 840-0914	6/15/2008	48.5%	21.7%	6/15/2008
DURHAM / WAKE	U-4026A/B 2904	DAVIS DRIVE / NC-54	WIDENING OF DAVIS DRIVE FROM MORRISVILLE-CARPENTER ROAD TO NC 54, WIDENING OF NC-54 FROM DAVIS DRIVE TO MIAMI BLVD	\$ 35,467,891.08	6.363 miles	C C Mangum Company LLC	Jeff Allen, PE	(919) 733-9499	11/1/2009	30.3%	43.4%	11/1/2009
DURHAM	U-4410DB	HOPSON ROAD	NEW ALIGNMENT OF HOPSON ROAD FROM NC-55 TO LOUIS STEPHENS DRIVE	\$ 3,476,305.55	0.587 miles	Thompson Contracting, Inc.	Jeff Allen, PE	(919) 733-9499	10/1/2008	18.0%	32.1%	10/1/2008
DURHAM	B-3450 / U-4009 / U-4012	GARRETT ROAD	TWO BRIDGES ON GARRETT RD; SERVICE ROAD NEAR US 15-501 AND GARRETT RD INTERSECTION; US 15-501 FROM NORTH MT. MORIAH RD SOUTH OF GARRETT RD	\$ 18,810,912.36	1.769 miles	DLB, Inc.	Aaron V. Earwood, PE	(919) 220-4680	8/1/2010	7.5%	9.5%	8/1/2010
DURHAM	B-3169	RIVERMONT ROAD	BRIDGE 158 ON RIVERMONT ROAD (SR-1402)	\$ 539,350.81	0.067 miles	SMITH-ROWE, INC.	Aaron V. Earwood, PE	(919) 220-4680				
DURHAM	2008 Resurfacing	US-501, NC-55, SR	RESURFACING AND SHLDR RECONSTR. OF US-501, NC-55 AND 14 SECTIONS OF SECONDARY RDS	\$ 3,389,883.53	21.5 miles	C C Mangum Company LLC	Cadmus Capehart, PE	(919) 840-0914	8/1/2008			
DURHAM / WAKE	B-3528	LEESVILLE ROAD	BRIDGE OVER SYCAMORE CREEK ON LEESVILLE ROAD (SR-1839)	\$ 1,300,000.00	0.284 miles		Cadmus Capehart, PE	(919) 840-0914	5/15/2009			

**NCDOT PROJECTS FOR LET NEXT 12 MONTHS IN DURHAM COUNTY - 4/1/2008**

County	TIP #	Route	Location Description	Contract Estimate	Length	Contact Engineer	Phone #	Contract Let Date			
DURHAM	U-2055B	NC 55	CONSTRUCTION OF TURN LANES AT RIDDLE ROAD AND NC-55	\$ 223,238.50		B. UPSHAW	(919) 220-4600	spring 2008			
DURHAM	U-2055D	AVONDALE DRIVE	CONSTRUCTION OF ROUNDABOUT ON AVONDALE DRIVE	\$ 493,065.78		B. UPSHAW	(919) 220-4600	spring 2008			
DURHAM	B-4109	PICKETT ROAD	BRIDGE OVER MUD CREEK	\$ 850,000.00	0.078 miles	D. TAYLOR	(919) 250-4016	5/20/2008			
DURHAM	U-3309A	TW ALEXANDER DR	WIDENING FROM CORNWALLIS ROAD TO EAST OF NC-147	\$ 8,900,000.00	1.072 miles	J. MOORE	(919) 250-4016	2/17/2009			

12 MONTH TENTATIVE LET LIST MAY BE FOUND ONLINE AT: <http://www.ncdot.org/planning/development/ProjectMgmt/12month/>

PROGRESS REPORTS MAY BE FOUND ONLINE AT: <https://apps.dot.state.nc.us/traffictravel/progloc/>

**ACTIVE NCDOT PROJECTS LOCATED IN ORANGE COUNTY - DCHC MPO**

County	WBS #	Route	Location Description	Amount	Status
Orange	36945	SR 1010 (Franklin St.) @ Mallette St.	Upgrade traffic signal and install pedestrian signal heads REVISION; Install mast arm	\$110,000.00	<b>Signal plans &amp; specs. rec'd.- Proposal pending</b>
Orange	41096	NC 54 @ SR 2016 (Southern Drive)	Construct a left turn lane on NC 54 westbound	\$200,000.00	Barrett, Irvin & Jordan Contr., Inc.; available 4/15/08
Orange	41488	US 15-501 @ SR 1900 (Old Mason Farm Road)	Extend the left turn lane on northbound US 15-501 , revise the signal and add a right turn lane at SR 1900	\$147,500.00	District design pending
Orange	41593	Union Street	Construct 750 feet of sidewalk and a crosswalk to connect Hillsborough Elementary School to SR 1156 (Nash St.)	\$32,000.00	Town to construct as <b>part of large STP-DA sidewalk contract</b>
Orange	41686	NC 54 @ SR 1102/1951 (Dodson's Crossroads/ Butler Rd.)	Construct left turn lanes in both directions	\$250,000.00	<b>Plans &amp; specs. rec'd.-Proposal pending</b>
Orange	41953	SR 1733 (Weaver Dairy Rd.) @ SR 1737 (Sunrise Dr.)	Install a traffic signal	\$75,000	<b>Signal plans rec'd.; equipment on order</b>
Orange	41966	I-85/I-40 Weigh Station	Mill and pave lanes of I-40 WB/ I-85 SB at the Orange County Weigh Station near Efland.	\$100,000	<b>APAC-Atlantic, Thompson Arthur Div.; Avail. 3/17/08 Compl. 5/30/08</b>
Orange	7CR.10681.14 7CR.20681.14 7C.068081	4 sections of NC 54 and ramps and 5 sections of secondary roads	Milling, resurfacing, pavement markings, and shoulder reconstruction		S.T. Wooten Corp.; Avail. 5/12/08 ICD 8/8/08 Compl. 10/31/08; <b>FA patching underway</b>
Orange	SF-4907 B 41699.1	US 70 (Hillsborough Rd.) and NC 751 near Durham	Install a right turn lane for traffic travelling east on US 70 and turning right onto NC 751	\$35,000 PE	<b>Design=75% compl.; to R/W 6/20/08</b>
Orange	SF-4907 C 41698.1	NC 57@ NC157 near Hillsborough	Install center traffic islands with stop signs on NC 157	\$7,000 PE	<b>Design=75% compl.; to R/W 6/20/08</b>
Orange	SS-4907E 41026.3	NC 54 @ SR 1952 (White Cross Road)	Construct a left turn lane	\$173,000.00	APAC-Atlantic, Thompson Arthur Div.; Avail. 4/21/08 Compl. 6/27/08

**ACTIVE NCDOT PROJECTS LOCATED IN ORANGE COUNTY - DCHC MPO**

Orange	SS-4907 J 41634.3	NC 54 and SR 1945 (Neville Rd.)	Construct a left turn lane	\$187,000.00	<b>Plans &amp; specs. rec'd.-Proposal pending</b>
Orange	U-4008 35009.3.2	US 15-501 & SR 1734 (Erwin Rd.)	Grading, drainage, paving and intersection improvements (Super Street)	\$4.98 million	<b>100% complete; open to traffic 1/8/08; Div. reviewing requests from DCHC</b>
<b>NCDOT PROJECTS CURRENTLY IN 12 MONTH LETTING LIST</b>					
County	TIP #	Route	Location Description	TIP Est.	Est. Let Date
Orange	I-4716	I-40	Grind and reseal joints on I-40 from I-85 to Durham Co.	\$1.5 million to be revised	Jan. 20, 2009
Orange	B-4218	SR 1730 (Turkey Farm Rd.)	Replace Bridge # 108 over New Hope Creek	\$675,000.00	July 15, 2008
Orange	B-4592	SR 1561 (Lawrence Rd.)	Replace Bridge # 64 over the Eno River	\$1.6 million	Jan. 20, 2009
<b>Orange</b>	<b>R-4468</b>	<b>I-85/I-40 Weigh Station</b>	<b>Upgrade weigh in motion technology on SBL/WBL</b>	<b>\$1.0 million</b>	<b>16-Jun-08</b>