METRO

Transit-Oriented Development Program

Improving Accountability Through Enhanced Measures of Service Efforts and Accomplishments

March 2001

A Report by the Office of the Auditor

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20014-10710-AUD

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Office of the Auditor

March 8, 2001

To the Metro Council and Executive Officer:

Metro's Transit-Oriented Development Program:
Improving Accountability Through Enhanced Measures of Service Efforts and Accomplishments

This is our second report on Metro Service, Efforts and Accomplishments (SEAs) – performance measures that describe an organization's resources, work efforts and accomplishments in meeting its mission, goals and objectives. This report focuses on SEAs in Metro's Transit-Oriented Development (TOD) Implementation Program.

The TOD Program is aimed at providing long-term benefits in line with the region's growth goals. This program provides incentives for developers to build mixed-use, higher-density projects near transit centers along the MAX Light Rail Transit line. In doing so, the program seeks to increase transit use, reduce reliance on automobiles, improve the quality of neighborhoods, and address other benefits outlined in Metro's 2040 Growth Concept. The program has already helped bring two projects to completion with several more under way.

The program is a good candidate for SEA measures because it has well established goals and objectives – a cornerstone for effective SEAs. It also has some measurement activity under way. As the program matures, managers will need enhanced SEAs to document and evaluate the extent to which the program's mission, goals and objectives are accomplished. It will be important to document and promote not only the program's potential benefits, but how fully these benefits materialize after projects are completed.

We sincerely appreciate the cooperation and assistance we received from Metro's TOD Program staff – Phil Whitmore and Marc Guichard – as we conducted this review. The last section of this report presents the Executive Officer's written response to a draft of this report.

Very truly yours,

Alexis Dow, CPA
Metro Auditor

Auditor: Joe Gibbons

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Executive Summary

Federal, state and local governments are using performance measures as a standard way of doing business better. Many are using Service Efforts and Accomplishments (SEAs), an approach that includes measuring not only what services governments provide, but also what these services accomplish for their customers.

Metro's Transit Oriented Development (TOD) Implementation Program is aimed at providing long-term benefits in keeping with the region's growth goals. This program provides incentives for developers to build mixed-use, higher-density projects near transit centers along the MAX Light Rail Transit line. In doing so, it seeks to increase transit use, reduce reliance on automobiles, improve the quality of neighborhoods, and address other benefits outlined in Metro's 2040 Growth Concept. Although small and only a few years old, the program has already helped bring two projects to completion and has several more under way. For example, the program was able to facilitate the development of 122 housing units with ground-floor retail space at a location where the developer initially had planned to put 14 row houses and no retail space.

One reason the program is a good candidate for SEA measures is that it has well established goals and objectives – a cornerstone for effective SEAs. It also has some measurement activity under way. Thus far, the program's performance measures have been centered on making estimates about the effectiveness of projects that will be completed in future years. Because these effects will not be known for some time, this initial approach has been sound. Estimating program effectiveness has also helped gain support and grant funding from the Federal Transportation Administration. Program managers have been alert also for ways to enhance existing measures. For example, as part of the interchange during this audit, managers have proposed quantifying and measuring TOD project benefits related to changes in walking and biking.

As the program matures, managers will need enhanced SEAs to document and evaluate the extent to which the program's mission, goals and objectives are accomplished. It will be important to document and promote not just the program's potential benefits, but how fully these benefits actually materialize after projects are completed.

We present our specific recommendations on the next page.

Recommendations

As the TOD Program matures, we recommend that Metro:

1. **Continue efforts to develop a clear and cohesive framework for SEA measures that demonstrate program accomplishments.**
   TOD managers have developed innovative measures that estimate certain elements of individual project and program effectiveness. They also have been alert for ways to enhance measures. For example, based on the auditor's suggestion during the course of our work that additional project benefits may be measured, managers proposed to the TOD Steering Committee that project benefits related to changes in walking and biking be quantified and measured. The steering committee agreed that such measures should be used as part of program methodologies and included as "capitalized value of public economic benefit."

   The SEA framework should define:
   - the purpose of the SEA measures
   - how SEA measurement information will be used to manage the TOD Program
   - responsibilities for developing relevant measures, establishing timely data collection methods and reporting reliable SEA data, especially those that relate to program effectiveness.

2. **Simplify the measurement process by selecting a limited set of the best, most useful performance measures – the vital few – that address the program's highest priorities.**
   The Program needs to identify SEA effectiveness measures that can be administered efficiently and provide reliable information. Managers should focus on a few essential measures that address its most important goals and objectives and give priority to effectiveness measures. To help the program continue to develop a core set of measures, we offer a list of proposed measures in Table 5.

3. **Update data used to measure performance.**
   Each SEA measure needs a consistent data source. TOD managers use sophisticated methods to estimate project costs and benefits. Some measures, such as travel behaviors under certain circumstances, are derived from reliable data sources. For example, TOD managers monitor data from the Institute of Transportation Engineers, Metro travel surveys and other sources. Program managers should continue to define the method, frequency and reliability of data collection. Moreover, they should continue to develop baseline data on actual projects after they are completed and stabilized.

Introduction and Background

To provide accountability, governments must measure and report the degree to which they are able to accomplish their stated goals and objectives. To accomplish this purpose, many governments are turning to Service Efforts and Accomplishments (SEAs). SEAs provide a performance-based measurement approach that appeals to many jurisdictions, because SEAs focus not only on expenditures, services, and products but more importantly on customer-driven accomplishments.

SEAs are not intended as "data for data's sake," but rather as useful diagnostic tools for managers and others who have oversight responsibilities. Therefore, it is important that they link to and indicate success in meeting goals and objectives. They are often found to be most helpful when limited to a vital few. Doing so helps keep matters focused and also helps insure that the costs involved in collecting and analyzing the data do not become prohibitive.

SEAs rely on a clearly stated program mission and on well-defined goals and objectives. Building on these elements, SEAs require measures of the following:

- resources that are applied to a program, such as staffing levels and funding
- workload that show the type and amount of effort expended, such as the number of requests for proposal issued
- accomplishments that indicate how well a program meets its goals and objectives, such as transit ridership levels and enhanced revenues.

Metro's Transit Oriented Development (TOD) Implementation Program is a good candidate for SEAs. This program, designed to encourage higher-density and mixed-use development along the region's 33-mile MAX line, currently relies on a set of performance measures to justify projects whose actual impacts will not be known for some years. As the program matures, managers will need enhanced SEAs to document and evaluate accomplishments. This report describes what the program is, what performance measures are currently in place, and how the program can enhance SEAs for the future.

Objectives, Scope and Methodology

This report attempts to extend some of the lessons learned from our SEA analysis at the Oregon Zoo[1] to a smaller but significant Metro program – the Transit Oriented Development Implementation Program. We evaluated whether the TOD Program has an SEA measurement system

[1] The Oregon Zoo—Service Efforts and Accomplishments, August 2000, Metro Office of the Auditor

that can adequately monitor progress toward accomplishing its goals and objectives. We reviewed professional literature to increase our understanding of the fundamentals of performance measurement and to identify criteria for judging the quality of the program's SEAs.

Our objectives were to:

- Identify the program's customers, mission, long-term goals and short-term objectives as ground work for establishing key SEAs
- Identify factors that help and hinder program effectiveness
- Evaluate current performance measures that have been established by Metro, Federal Transit Administration (FTA) and other stakeholders to determine their basic reasonableness and applicability as the program evolves
- Develop SEAs for the program, limiting these to an essential few that would provide information for accountability, policymaking and program management.

We performed our work between July and December 2000 in accordance with applicable generally accepted government audit standards. As part of our work, we:

- Reviewed pertinent sections of the Regional Transportation Plan, FTA standards, Metro budget documents, Metro council Resolutions, TOD Steering Committee minutes and other documents.
- Inspected active or planned TOD projects, such as Hillsboro Central, Metro Access, Buckman Terrace, Center Commons and Gresham Central. We describe the projects in Appendix A. We also inspected potential TOD sites such as Gresham Civic Neighborhood and TOD-related projects, such as Orenco.
- Interviewed TOD Program partners from the public and private sectors and TOD managers and developers from other locations. We describe these officials in Appendix B.
- Reviewed and analyzed projected performance measures that TOD managers use to justify projects.
- Discussed the results of our work with TOD Program managers and made recommendations for enhanced SEAs that will reflect program accomplishments.
- Reviewed a draft of this report with TOD managers, the Transportation Department Director and the Executive Officer to help ensure completeness and accuracy. We present the Executive Officer's comments at the end of this report.

Metro's Transit Oriented Development Program Has Progressed Rapidly

Metro's TOD program, although a new effort with rather minor funding, has already made substantial progress in establishing "transit villages" along the Max Light Rail line. Further, the program shows a high degree of potential to meet its long-term goals in a cost-effective manner. Investment in these "transit villages" appears to be a cost-effective means of inducing transit use and reducing auto use. In this chapter, we discuss what the program is, how it works, and what it has accomplished so far.

What Is the TOD Program, and How Does It Work?

Metro's growth management plan, The 2040 Growth Concept[2], calls for the region to grow up rather than out into farmland and open space by limiting expansion and focusing growth around transit. The TOD Program focuses on meeting the intent of this growth concept by demonstrating benefits of mixed-use, higher-density developments along the region's 33-mile MAX Light Rail Transit (LRT) line. TOD is the only Metro program that attempts to influence development by delivering "bricks and mortar" rather than providing traditional planning and regulation.

Program Concentrates on Higher-density Developments Near Transit Facilities

The program encourages private-sector construction of higher-density, mixed-use projects near transit stations, with pedestrian amenities, that help shape the community for increased transit use. It attempts to "push the envelope" from other development that would otherwise occur in LRT station areas. For example, if the real estate market at an LRT station area will typically support building two stories, the program pushes for three stories. If the market supports three stories, the program pushes for four stories, etc. Similarly, the program pushes for single-use projects to become mixed-use projects. Table 1 shows some of the benefits that Metro intends the program to provide.

[2] The Region 2040 Growth Concept is the regional land-use policy document adopted by the Metro Council in December 1995. The policy encourages compact development near transit to reduce land consumption and preserve existing neighborhoods.

Table 1 Examples of Benefits Intended Under the TOD Program

Type of Benefit	Explanation
Improved air quality and reduced auto traffic congestion	The project seeks to accomplish these benefits by developing more "urban-scale" buildings with reduced parking ratios and ready access to transit. Studies indicate that, compared to typical suburban development, projects such as those encouraged under TOD can reduce traffic congestion and air pollution by up to 30 percent.
Greater cost-effectiveness for transit-related expenditures	National studies have shown that development of projects like those encouraged under TOD is 8 to 14 times more cost-effective than building additional light rail transit lines. The program is also cost-effective compared to conventional congestion mitigation measures, such as new LRT construction, freeway expansion and vanpools. See Appendix D for comparative statistics.
Enhanced economic development	The program seeks to attract consumers, businesses and social services to areas surrounding LRT stations.
Enhanced housing and transportation options	The program seeks to encourage mixed-use development next to transit. It seeks to create housing opportunities for low-income non-automobile families who can have better access to goods and services.
Enhanced livability	Metro's regional growth management plan concentrates population and job growth within nine "regional centers". The LRT system will soon serve most centers, including downtown Portland, Gateway, Hillsboro, Beaverton and Gresham. Thus, Metro estimates that residents of a TOD project will be provided convenient and inexpensive access to most of the region's major locations of jobs, services and trade centers.

The program has two full-time staff members and a steering committee. The steering committee is responsible for approving projects within criteria established by the Metro Council.[3] Most of the money to fund

[3] Members of the steering committee include representatives of the Governor's Office, Department of Environmental Quality, Oregon Department of Energy, Department of Land Conservation and Development, Oregon Housing and Community Services Department, Tri-Met, Metro Council, Oregon Department of Transportation, Oregon Economic Development Department, and Portland Development Commission.

the program comes from Federal Transit Administration (FTA) grants. For the period FY 1997 through FY 2000, these grant monies accounted for $2.4 million of the program's total $2.6 million resources. Other resources come from local program funds ($103,000) and Metro general funds and transfers ($152,000). During the same period, the program expended $1.8 million for TOD project sites and $800,000 for "soft costs", such as personnel, materials and services, technical assistance, Metro overhead and pre-acquisition expenses for future projects.

Program Uses Several Approaches for Making Higher-Density Investment More Affordable

The program has two main approaches for encouraging development of these kinds of projects: "write-downs" of land values, and joint development partnerships.

Write-Downs To help cause higher-density and mixed use in advance of a time when land economics would drive this type of development, the TOD Program invests in projects by "writing down" land values. To do so, the program buys land or acquires easements at market value and resells them at a reduced amount. Doing so helps offset costs associated with the higher-density, more expensive projects TOD tries to encourage.

The "write-down" starts with an appraisal or analysis that identifies costs resulting from the elements of higher-density or mixed-use construction, such as structured parking, firewall separation between uses, or more sophisticated fire protection systems. These special costs are then backed out of the market land value. The new value, called the "highest and best transit use value," responds to the conditions Metro imposes on the developer. For example, at the Center Commons project, Metro required that dwelling units be constructed with stringent conditions that developers ordinarily would not accept. These include 60 dwelling units per acre (versus about 25 units per acre without TOD), ground floor retail, high quality pedestrian walkways leading to the light rail station, some structured parking, and firewalls separating uses.

Joint-Development Partnerships TOD projects are constructed through joint-development partnerships between public agencies (such as Metro or local jurisdictions) and private developers. In these partnerships, public agencies contribute land and capital and "tools" that may assist project implementation in various ways, including the write-downs procedures discussed above. Other tools available under joint development include the following:

- Financing through private lenders. Developers must secure financing for TOD projects. Developers told us that Metro's TOD Program is uniquely instrumental in helping them secure financing because lenders look at Metro involvement and financial commitment as a key to project integrity.

- Provision of site preparation and site improvements. For some projects, Metro will provide funding to offset some or all of these costs.
- Co-use of transit station structure, site improvements or land. For example, utility lines for a transit station may be upsized to handle higher-density development.
- Issuance of Request for Proposals (RFP). Metro issues RFPs in order to expose the program to the development community.
- Development Agreements designed to define requirements of each party prior to start of construction and through completion.
- Technical assistance, such as Metro providing information on TOD standards, problems and solutions for achieving desired results.

Program Involves Many Customers and Partners

Metro's TOD Program provides services to a variety of customers and partners that are internal and external to the agency. Table 2 summarizes these customers and partners, along with the services the program provides to them. Among these customers and partners, private developers play a major role. They may be for-profit or non-profit entities, such as the non-profit Innovative Housing Corporation, the developer of row houses in the Center Commons project. The developer's role in the partnership is to find financing, build, rent/sell and maintain the project. Each partner, private and public, expects to receive a return on investment. For the public agency, the return may be a lease or sale amount for the land or the implementation of public policy, such as new ridership, reduced traffic congestion and area redevelopment. For the developer, the return is often the developer's fee and net profits from managing the project.

Table 2 TOD Program Customers, Partners and Services

Program Customer and Partner	Metro TOD Program Services
Federal Transit Administration (FTA)	• Program and site-specific documentation • Documentation on compliance with FTA standards • Innovative approaches for the program to proceed nationally • Documentation of appraisal, environmental and specific acquisition
Metro Council	• Program updates and demonstration of effectiveness • Documentation on costs/benefits of projects • Basis to authorize projects • Responses to suggestions/changes posed by Council
TOD Steering Committee	• Basis to approve projects • Proposals for potential projects • Progress reports on negotiations with developers
Private Developers	• Potentially profitable project opportunities • RFPs that state requirements and benefits
Local Jurisdictions	• Technical Assistance • Data regarding costs and potential markets
Portland Development Commission (PDC)	• Potential site development opportunities
General public/Transit riders	• Enhanced MAX ridership opportunities • Enhanced transit options
Professional colleagues, other TOD programs, researchers	• Program research, access, tours

TOD managers work with these customers and partners in a variety of ways to bring a project from conceptualization to reality. Actions taken to bring projects to fruition, some of which are performed concurrently, include the following:

- Identifying and determining potential TOD project sites, based on criteria established by the Metro Council, the 2040 plan, FTA and other standards. Sites are located within one-quarter mile of LRT stations.
- For potential sites identified, performing preliminary feasibility analyses.

- For feasible sites, developing an RFP for developers that describes such things as the TOD program, application processes and criteria for selection.
- Submitting the RFP to the Metro Council and TOD Steering Committee for approval.
- Completing due diligence requirements, such as appraisals and development agreement Submitting data to FTA for grant funding approval.
- Finalizing development agreement with the Executive Officer.
- Purchasing (and later reselling) project land with TOD conditions.
- Monitoring project construction to assure compliance with TOD conditions.

What Has the Program Accomplished So Far?

In its brief history, Metro's TOD Program has made significant strides. Starting at "ground zero" in 1994, at which time the Federal Transit Administration did not permit use of federal funds for TODs, the program has evolved rapidly. Appendix C contains a timeline of key events in the program, from its initial inception in 1991 to the present. These events have translated into accomplishments in several areas, including actual projects completed, strong support among those involved, effective use of limited resources, and development of approaches that have been extended to communities nationwide.

Specific Projects In Place or Under Way

The program now has several projects in place or under way, including the following:

- Buckman Terrace is a five-story building located at NE Sandy Boulevard and NE 16th Avenue in Portland and completed in August 2000. This project has 122 housing units and ground-floor retail space in a five-story urban style mid-rise building. The developer had initially planned to develop the site with 14 row houses and no other uses. Metro TOD contributed $100,000 toward the project, primarily due to its ground floor retail space, structured parking ratios, and enhanced pedestrian amenities. The developer told us that Metro TOD Program involvement in the project helped assure its success.
- The Center Commons project is a mixed-use/mixed income "transit village" project located adjacent to the NE 60th St. LRT station and NE Glisan Street in Portland and completed in September 2000. This project has from 2 to 5 story buildings, providing 172 senior apartments, 60 affordable family apartments, 56 "market rate" apartments, 26 "for sale" row houses, ground floor retail and a child care center. The overall density is 65 units/acre. The developer told us that without Metro's involvement the project would have been less than one-half of its current density and not nearly as attractive. Metro contributed $250,000 toward the project.

Appendix A contains a summary of projects completed, under way, and in planning.

Satisfaction from Partners and Customers

The program's partners and customers basically have a very positive view of the program. Our interviews with 12 of the program's partners and customers, including representatives of FTA, the TOD Steering Committee, PDC, local jurisdictions and developers, found these groups to be satisfied with the program's organization, direction and effectiveness. More specifically:

- Developers stated that the TOD Program was a major, if not critical, factor in their ability to construct projects. They attributed Metro's credibility and commitment as a significant factor in attracting project financing.
- Local agency officials who have worked with the TOD Program stated that TOD often plays a major role in making mutually beneficial projects work.
- Most officials said the program's primary need is more funding.

Effective Use of Resources

TOD managers estimate that private investment in the region's TOD projects will eventually be more than $175 million, as compared to about $10 million of FTA grant monies invested through the TOD Program. Additionally, local match funds for the program will be about $1.2 million. In total, they expect that the program will achieve a federal funding leverage ratio of more than 17 to 1.

Although Metro's dollar contributions are relatively small, its non-dollar contributions, such as staff expertise and ability to "make deals work", have had a significant impact on program success. For example, TOD Development Agreements crafted by TOD managers are structured so that TOD funds reduce the developer's equity capital requirements and provide critical up-front funding. This money enhances developer's effectiveness because they have incentives and TOD funds to keep projects on track. Other development funds coming from local agencies, such as tax abatement, while effective, do not impact the project until after completion.

FTA requires Metro to meet a $343,249 local match requirement on the initial FTA grant of almost $3 million. Since most of the grant monies are and will be used for land acquisitions ("hard costs"), Metro intends to fulfill most of local match requirements from non-Metro sources, such as in-kind contributions from developers or property owners and contributions from local governments. Metro's match for "soft costs" will be paid from the Metro general fund.

A large part of program accomplishment is related to TOD managers' diligence in finding creative methods to secure FTA grant funds while concurrently preserving Metro funds. After the initial start-up period, the TOD Program annually spends about $24,500 of Metro funds. Although TOD managers have funds available to meet local match needs, their strategy is not to spend funds now because they believe that in-kind contributions will accrue from future TOD projects, thereby satisfying local match requirements. Local funds can be used for non-federal elements of projects such as site improvements or local match on future FTA capital grants. We believe that their strategy of providing local match from TOD projects serves Metro well.

Importance as a National Laboratory

In the process of developing the program, Metro has also helped establish specific TOD policies and regulations that FTA adopted and applied nationally. For example, as a direct result of Metro's input, all TOD programs throughout the country can now do the following:

- Fund acquisition of sites directly as a public purpose, rather than indirectly, as a public facility. This allows government agencies to participate on privately owned sites.
- Resell a site at less than its highest value if the proposed use generates more transit ridership. For example, a car wash may generate higher land value than a day care center, but the day care center will generate a great deal more transit ridership.
- Justify projects more precisely through cost-benefit analyses that allows the concept of greater economic return to transit.
- Use the proceeds of land sales and leases basically as a revolving fund, which allows the proceeds to be applied to other projects rather than returned to the U.S. Treasury. FTA gave Metro and three other jurisdictions (Atlanta, Washington D.C. and Baltimore) a special trial period for retaining land-sale proceeds.

Conclusion

Metro's TOD Program implements an innovative and relatively cost-effective approach to achieving mixed-use, higher-density projects that will potentially result in increased transit use, less reliance on automobile use, and other public benefits defined in the 2040 Growth Concept. Metro appears to have a one-of-a-kind TOD Program with methods to achieve these significant goals. The program looks especially purposeful considering its small staffing and funding.

Development of SEAs Is Under Way – Additional Actions Are Needed for Future Success

Three steps are involved in developing and using meaningful SEAs. The TOD program is mid-way toward implementing them.

- Step one requires managers to define program mission, goals and objectives and define their desired outcomes. Program managers have accomplished this step.
- Step two involves measuring actual performance. Program managers are working towards completing this step. They have developed some SEAs, but as the program matures, they will need to make sure the SEAs they select are the most relevant ones, and that SEAs are limited to a vital few.
- Step three involves managers using performance data as they identify performance gaps, reporting findings to policy makers, and using data to make program corrections. Because TOD is so new, and because actual effectiveness data are not yet available, program managers have not yet addressed this step. The measures they have developed thus far provide ways to estimate potential benefits. As the program matures, better measures of actual results will be needed.

This chapter discusses the strengths and weaknesses of the program's current SEA measures, describes what we think can be done to improve them, and outlines a list of core SEA measures to assist TOD managers in their efforts to improve and simplify the performance measurement process.

Framework of Goals and Objectives Is in Place for Developing Effective SEAs

A quality SEA system starts with a well-stated mission supported by specific goals and objectives. Workload and effectiveness measures should flow from these elements. TOD managers have developed a clear mission and appropriate goals and objectives.

Mission

TOD's mission is to demonstrate its value by:

- helping create development projects at LRT stations, increasing ridership and non-auto trips
- ensuring that regionally significant TOD projects are undertaken
- assuring that development tools for TOD evolution are in place
- sharing technical information with developers, lenders, academia and other officials.

This mission statement is consistent with SEA standards because it defines the program's reason for existence. It is the foundation for SEA measurement and succinctly identifies the unique purpose of the program, what the program does, and for whom. The mission statement was developed with significant input from all levels of the organization and the stakeholders.

Goals and Objectives

Program goals, summarized in Table 3, are consistent with SEA standards because they flow from the program mission and are time-sensitive. Goals are consistent with the mission statement, address the top priorities of the program. These goals provide direction to managers, are few in number, and are achievable within 10 years. They provide a firm foundation for the more quantifiable, time-based objectives.

Program objectives, also summarized in Table 3, are likewise consistent with SEA standards because they contain measurable targets for specific actions. They mark interim steps toward achieving the program's goals. They are commonly achievable in about 2 to 4 years, and they are quantifiable and realistic.

Table 3 Goals and Objectives of the TOD Program

Long-Term Goals (5 to 10 years)	Performance Objectives (2 to 4 years)
Develop a long-term, cost-effective TOD Program that induces TOD projects into LRT station areas and leads to: 1. Effective partnering with private and public sector 2. Higher-density housing 3. Mixed-use projects 4. Destination uses with physical and functional transit connection 5. Buildings with low parking and high Floor-Area Ratios (FARs) 6. Increased modal share of transit and non-auto trips 7. Leveraged public expenditures within station areas 8. Induced transit ridership	1. Form partnerships with 10 entities in private and public sector 2. Construct 1,000 higher-density housing units at 8 or more sites 3. Construct 5 mixed-use buildings 4. Construct 1 destination use that has a physical and functional connection to transit 5. Construct 4 suburban building types with parking ratios of 1.6 or less and FARs of .5 to 1.5 6. Increase by 600% the modal share of transit and 200% increase for non-auto trips at specific projects, as compared to the entire region 7. Demonstrate 5 site-specific projects that leverage public funds 8. Induce 340,000 annual transit trips within five years
Request and consistently receive adequate FTA funding for the region's desired TOD projects	• Establish verifiable measures that demonstrate effectiveness on issues that include – Cost per induced transit rider – Cost penalties of a TOD project – Induced ridership – Reduced auto use • Comply with FTA funding request requirements • Innovate approaches to satisfy FTA requirements
Establish and maintain joint development partnerships that encourage construction of higher-density housing and mixed-use projects and encourage increased transit use	• Identify, contact and work with potential partners for TOD projects – make them part of the "team" • Implement RFP evaluation process that awards bonus points for adding public financial partner and leverage of TOD funds • Ensure that TOD public-private partnerships use Development Agreements for site preparation and improvements
Demonstrate sound regional leadership for all TOD Program-related functions and responsibilities	• Establish and implement performance measurement system to track program's effectiveness • Develop measures to identify long-term benefits • Lead development of 5 site-specific TOD projects that are "on time, on budget," and exceed customer expectations
Establish local funding for site preparation and site improvements with TOD projects	• Provide for 4 projects funded with local site improvement program

Development of SEAs Is in Process

Development of SEAs for the program has focused on predicting or measuring outcomes, not on measuring the amount of work conducted. TOD managers believe, and we agree, that quantifying numerous work steps associated with the production of development proposals, technical evaluations, and "due diligence" documents like appraisals or environmental analyses, would not enhance program effectiveness or be a productive use of limited program resources. For example, in order to gain FTA approval for acquisition of the Hillsboro Central site, TOD managers had to produce about 55 documents, including formal requests to FTA, local match approvals, environmental assessments, real estate appraisals and Development Agreements. Managers' time to produce summary documentation to measure work activities would be counterproductive.

Current Measures Need Refining

The most meaningful measure of the program is its success in producing higher-density, mixed-income housing with retail and pedestrian area plazas and in securing sites for a future TOD projects that would otherwise be underdeveloped. Program managers now measure program effectiveness in terms of how well the program is getting started, although effectiveness in this regard is often difficult to measure. We worked with TOD Program managers to enhance some projected effectiveness measures and establish new ones. These effectiveness measures, as related to program objectives, are summarized in Table 4.

Table 4 Objectives and Effectiveness Targets of the TOD Program

TOD Program Objective	Type of Measure	Target Within Four Years
Forming partnerships with the private and public sector to construct higher-density housing, mixed-use projects and destination uses that have a physical and functional connection to transit	• Formation of specific partnerships • Specified density standards for residential and commercial projects	• Partners will include PDC, local jurisdictions, private developers, non-profits • Density for residential projects will be between 35 to 80 dwelling units per acre; floor to area ratios will be between 0.5 to 1.5
Developing suburban building types with low parking ratios	• Specified parking ratios for residential sites	• Residential sites will have between 0.8 and 1.6 parking spaces per dwelling unit
Increasing the model share of transit and pedestrian trips within station areas while decreasing reliance on personal autos	• Specified percentage changes in residents' mode of travel	• Non-auto trips will increase from 9 to 20% of total trips • Transit trips will increase from 3 to between 10 and 15% of total trips
Constructing higher-density housing units, mixed-use buildings, a destination use that has a physical and functional connection to transit and suburban building types with low parking ratios	• Completed construction on specified number of housing units, mixed-use buildings, destination use and suburban building types	• Complete 4 higher-density projects that include 260 units at mixed-use sites by January 2002 • Complete 1 destination use project by January 2002 • Complete 5 suburban building types with parking ratios of 1.6 or less and Floor Area Ratios between 0.5 and 1.5 by January 2002
Demonstrating projects that effectively leverage public funds	• Specified number of completed showcase projects	• Complete 5 showcase projects by January 2003
Inducing transit trips	• Specified number of trips induced	• Induce an average of 600 daily transit trips by January 2003
Establishing verifiable measures that demonstrate TOD Program effectiveness on most critical objectives	• Define, fully implement and monitor critical measures consistent with recommendations in Auditor SEA report	• Fully implement Auditor recommendations by January 2002

Future Development Needs to Focus on SEAs That Are Most Vital to Program Success

The program's long-term viability is subject to many "known unknowns." Potential negative influences may include consumers' changing life styles, impacts of technology on shopping styles and transit needs, interest rates for project financing and reduced FTA grants. While most factors are outside of the control of TOD Program managers, they should continue to be aware that positive outcomes projected today could vanish in the future. Concentrating on the most vital effectiveness SEAs can improve the program's chances for moving in the right direction.

Key SEA measures concentrate on the most important effectiveness indicators of performance. SEAs should be limited to the vital few measures that cover the key performance dimensions that enable managers to assess accomplishments, make decisions, realign processes and assign accountability. Programs that seek to manage too many performance measures risk creating a confusing excess of data that will obscure rather than clarify performance issues. Limiting the number of SEAs to the vital few will keep the focus where it belongs and help ensure that the costs involved in collecting and analyzing the data do not become prohibitive.

Based on our review of TOD data on a national scale and our discussions with local TOD stakeholders and managers, we found that some important measures of program effectiveness may be too difficult to measure. Essentially, they are real but not easily quantified. For example:

- One TOD Program aim is to induce TOD projects into LRT station areas. Developers and others told us that their decisions about such projects are often determined by the specifics of TOD's dollar commitments and other participation in the program. Other than opinions of the parties involved – and they may not all agree – a precise cause-effect assessment of this outcome would be difficult to establish.
- Another aim is improving air quality. Modeling of TOD mixed-use projects indicates a reduction in auto trips and hence should result in improved air quality for the region. However, measuring air quality is not a requirement for obtaining Program funds and is not a critical measure of program effectiveness. Moreover, a precise cause-effect outcome may not be possible to determine.
- Still another aim is making economic improvements and enhancing livability in areas surrounding TOD projects. However, other than opinions from sources such as local residents and retailers, a precise cause-effect outcome may not be possible to determine.

We identified some vital measures that can effectively demonstrate effectiveness of TOD projects. These are shown in Table 5. Based on our analysis of existing TOD data and discussions with TOD managers and Program stakeholders, we believe the following vital few SEA measures represent the best indicators of program success.

Table 5 Proposed Vital SEA Effectiveness Measures

SEA Effectiveness Measure	Unit of Measure	Why Measure Is Vital
Induced targeted number of annual transit trips	Cause-effect relationship that demonstrates changes in transit trips to and from TOD project stations	Induced transit ridership is the most basic TOD Program standard
Increased modal share of transit and non-auto trips as a direct result of TOD project	Modal splits before and after TOD project (determined by base case scenario analysis for vacant land or pre-existing project)	TOD Program is charged with increasing transit and non-auto usage
Constructed targeted number of higher-density housing units and targeted number of mixed-use buildings	Before and after statistics at TOD projects' area (compared to "market area and determined by base case scenario analysis for vacant land or pre-existing project)	Enhanced densification is a Metro and TOD standard
Cost-effective public expenditures at TOD projects	Projects' data that show that TOD funds are used in cost-effective manner (e.g.: relative to other transportation options)	Program must be cost-effective to expand
Projects directly support 2040 Growth Concept	Comparison of before and after project attributes (density, etc.) to specific elements of 2040 Growth Concept	2040 Growth Concept is the most essential criteria for Metro TOD Program

Development of Performance Data Will Need Attention as Program Matures

In these early phases of the TOD Program, part of the measurement has been predictive in nature. Using data from national studies and Metro's 1994 Travel Behavior Study, managers estimate program costs and benefits that they believe will enable them to measure site-specific performance in about 4 years. More specifically, these estimates cover increases in transit ridership, costs incurred by the project as a result of increased ridership, and increases in transit revenue. Appendix D describes how TOD managers derive these estimates.

Because TOD is so new, actual effectiveness data are not yet available. Demonstrating program and project effectiveness will require data showing the conditions that existed prior to program efforts and the conditions in place after projects are completed. Therefore, accurate baseline data will be critical. Baseline data may involve both "hard" data (for example, transit ridership levels at project areas) and "soft" data (for example, attitudes and opinions regarding transit preferences or the influence of TOD projects on surrounding areas). Metro should attempt to determine attitudes of stakeholders, retailers, area residents and others for baseline and follow-up data.

Conclusions

SEAs can help measure program effectiveness and progress in the direction that the Metro Council, TOD Steering Committee, and TOD managers have developed. The program's current performance measurement process is largely related to making certain assumptions and estimating effectiveness on several factors associated with completed TOD projects. This approach has served TOD managers well because it presents assumptions and options considered as part of the TOD project planning process. As the program matures, SEA measures will need to be refined and geared to actual effectiveness as measured by performance of completed projects. We believe that enhanced attention to mature SEA effectiveness measures will lead to refined measures that will in turn lead to better program monitoring and selling not just the program's potential benefits but its actual effectiveness.

In order to improve current SEAs and precisely track actual program effectiveness, the program needs continued emphasis on:

- Clear program objectives that flow from the program's mission and goals. They provide a sound basis for performance measures.
- A complete but simplified set of SEAs that highlight the most vital effectiveness measures that are linked to the program's most critical goals.
- Acceptance and use of valid and continually updated SEA effectiveness information by policy makers and managers for direction and decision-making over the life of the program.

Appendix A

Description and Status of Metro TOD Projects as of January 2001

Center Commons – Funded Project

Project location: NE 60th Ave. & NE Glisan St., Portland
Project size: 4.88 acres
Project description: Mixed use mix-income project: 172 senior apartments, 60 affordable family apartments, 56 market rate apartments, 26 for sale row houses, 1,500 sq. ft. class A retail, child care center
Total Project costs: $30.4 million
TOD Program Funding: $250,000
Project status: Complete

Buckman Terrace – Funded Project

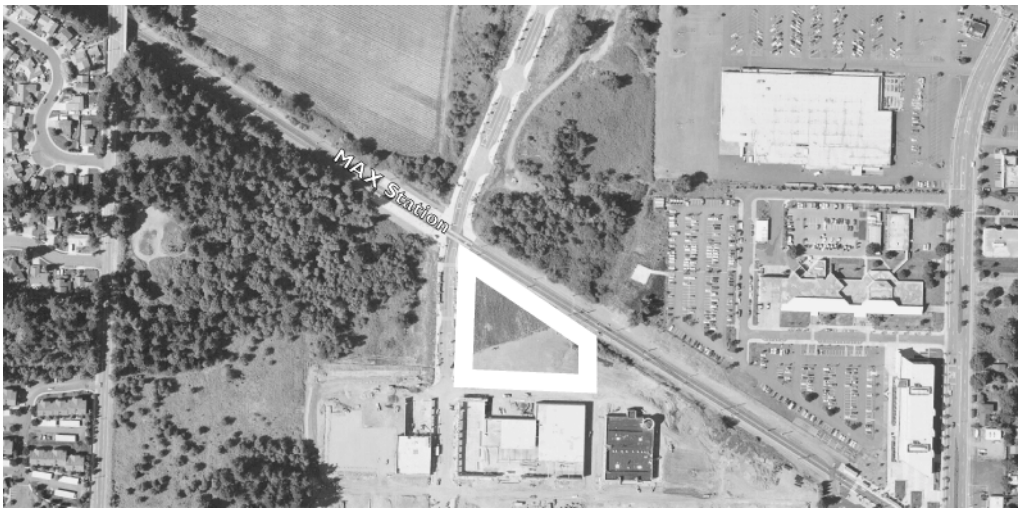
Project location: NE 16th Ave. & NE Sandy Blvd., Portland
Project size: 0.83 acres
Project description: Mixed use building: 122 apartments, 2,000 sq. ft. class A retail, structured parking
Total Project costs: $ 7.2 million
TOD Program Funding: $100,000
Project status: Complete

Gresham Central Point – Funded Project

Project location: 302 NE Roberts St., Gresham
Project size: 0.28 acres
Project description: Mixed-use building: 22 market rate apartments, 3,000 sq. ft. class A retail, tuck-under parking
Total Project costs: $2.3 million
TOD Program Funding: $60,000
Project status: Under construction

Gresham Civic SE – Funded Project

Project location: SE corner of Civic Drive and MAX tracks, Gresham
Project size: 2.1 acres
Project description: Mixed use project: 60 market condos, 25,000 sq. ft. class A retail; structured parking
Total Project costs: $8.1 million
TOD Program Funding: $300,000 (estimate)
Project status: Design development

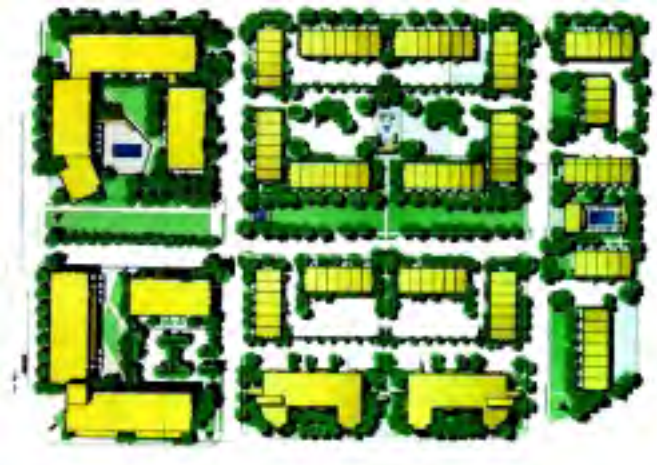


Hillsboro Central – Funded Project

Project location: 350 E. Main St., Hillsboro
Project size: 1.1 acres
Project description: Former bank building with drive thru tellers and parking lot; anticipate 3-4 story mixed-used building
Total Project costs: Undetermined at this time
TOD Program Funding: $300,000 (estimate)
Project status: Conceptual design; awaiting RFP

Russellville – Committed Project

Project location: SE 102nd Ave. & E. Burnside St., Portland
Project size: 10.1 acres
Project description: Mixed-use, mixed income project: 479 affordable & market apartments, 15,000 sq. ft commercial, child-care center, community center
Total Project costs: $44.5 million
TOD Program Funding: $500,000
Project status: Under construction



The Madison – Committed Project

Project location: SW 20th Ave. and SW Madison, Portland (Goose Hollow)
Project size: 0.11 acres
Project description: 13 unit transit supportive market condo building
Total Project costs: $5.3 million
TOD Program Funding: $50,000
Project status: Design development

Metro Access – Committed Project

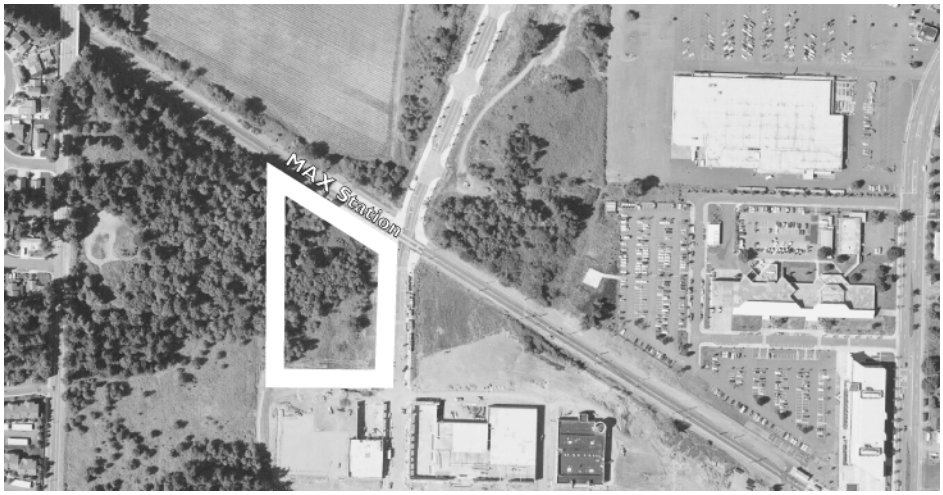
Project location: Millikan Way & Schottky Rd., Beaverton
Project size: 2.8 acres
Project description: Mixed use building: 40,000 sq. St. class A office, 20,000 sq. ft. service commercial
Total Project costs: $7.6 million
TOD Program Funding: $75,000
Project status: Design development

The Beaverton Round – Committed Project

Project location: Hall Blvd. at Beaverton Central MAX Station
Project size: 7.9 acres
Project description: Mixed use project: 137 residential units mix of market condo and apartments, 140,000 sq. ft class A office, 85,000 sq. ft. class A retail, 14 screen cineplex, public plaza, public garden.
Total Project costs: $80-120 million
TOD Program Funding: $2,000,000 ($1 million plus option for additional $1 million to be returned as project criteria are met)
Project status: Construction/design development

Civic SW – Committed Project

Project location: SW corner of Civic Drive and MAX tracks, Gresham
Project size: 4.1 acres
Project description: Currently vacant site; anticipate mixed-use development of housing, retail and integration with MAX station
Total Project costs: Undetermined at this time
TOD Program Funding: $500,000 (estimate)
Project status: Conceptual design



Appendix B

Sources of TOD-Related Data and Insights on Comparable Programs

Sources of TOD-Related Data and Insights on Comparable Programs

As part of our analysis and effort to better understand TOD concepts and issues at other locations, we reviewed TOD-related policies and studies from:

- The U.S. Department of Transportation (USDOT)
- Urban Land Institute studies on New Urbanism and Joint Development on transit projects
- Louis Keefer and Associates – "An Interim Review of Nine Urban Mass Transit Administration Assisted Joint Development Projects"
- *Transit Villages in the 21st Century* by Michael Bernick and Robert Cervero
- International Institute for Surface Transportation Policy Studies
- Real estate industry sources such as Portland area real estate market forecasts
- Mark Barry Reports
- Institute of Urban and Regional Development case studies on Suburban Clustered Development.

We surveyed TOD programs around the country and contacted their program managers to determine extent and nature of their programs and to obtain comparative data. Sources included:

- A TOD Program Manager, King County Department of Transportation, Seattle, WA
- The Executive Director of the City/County Association of Governments of San Mateo County California (who oversees a TOD incentive program)
- A transportation consultant who advises the Governor of Maryland on TOD issues.

We discussed aspects of Metro's TOD Program with developers who undertook TOD projects in the Portland area. These included:

- The president of American Pacific Properties (developer of Center Commons)
- The owner of Gresham Central Apartments
- The Director of Development, Prendergast and Associates (developer of Buckman Terrace)
- The owner of Bingham Construction, Inc. (developer of The Round at Beaverton).

We talked with government agency and other officials who have interacted within the TOD Program to determine their views of Metro's TOD Program. These officials included:

- A Project Manager at the Portland Development Commission
- A representative of the Governor's Office of Community Development and member of the TOD Steering Committee
- The Assistant City Manager for Community Development, Milwaukie, Oregon
- The Program and Funding Manager for ODOT Region 1 and member of the TOD Steering Committee
- The Principle of Hobsen and Associates, a real estate expert who advises Metro and developers on TOD projects.
- The Program and Funding manager for ODOT Region 1 and a member of the TOD Steering Committee
- An FTA Region 10 (Seattle) planner who oversees TOD projects.

Appendix C

Timeline of TOD Program History

TOD Program History

1991 1992 1993 1994 1995 1996 1997 1998 1999 2000 2001

- Metro proposes its first TOD program to local officials and FTA
- Metro poses policy questions to FTA to define TOD program
- FTA defines criteria to fund TOD joint development projects. Metro becomes FTA's "flagship" for TOD programs nationwide.
- Metro applies locally for regional flexible funds of $3.0 million for site acquisition, improvements and administration
- TOD managers successfully address skepticism through presentations at public meetings and hearings
- Metro applies to FTA for TOD implementation grant of about $3.0 million for land acquisition
- FTA is modifies policies on TOD to encourage joint-development projects and to allow for site acquisition, land value write-down, and Metro retaining the land sale and lease proceeds.
- FTA approves Metro 1996 grant for about $3.0 million to be used for land acquisition, write-down and administration
- FTA approves Program Environmental Assessment with "Finding of No Significant Impact"
- Metro Council approves RFP and TOD start-up activities that include establishing a Steering Committee, a Work Plan, project criteria and selection standards, and providing for Development Agreements
- TOD Steering Committee formed with responsibility to provide overall governance for the program, including project approvals
- Six RFP submittals selected covering a range of TOD types and locations
- Nation's first TOD opportunity site purchased for $650,000 - joint-development project at Hillsboro Central
- Center Commons TOD site purchased for $1.1 million, then sold to developer. Metro "cleared" $581,000 to use for future TOD projects and $195,000 from sale of donated easement
- Buckman Terrace TOD project undertaken
- First Metro TOD project - Buckman Terrace - completed
- Major Metro TOD project completed at Center Commons: 314 housing units, other uses, and common area
- Funding commitment made to Central Point in Gresham
- FTA allows Metro to invest not only in buildings but also in plazas, sidewalks, etc.
- Purchased TOD site in Gresham Civic Neighborhood

Appendix D

TOD Managers' Methodology to Forecast Induced Ridership and Cost Per Induced Rider

TOD Managers' Methodology to Forecast Induced Ridership and Cost Per Induced Rider

TOD managers apply selected performance measures based on national data and Metro's 1994 Travel Behavior Study. From these data TOD managers estimate program costs and benefits that they believe will enable them to measure site-specific performance in about 4 years. These measurements estimate: transit ridership increases, TOD project costs incurred as a result of increased ridership and transit farebox revenue increases.

Projecting Induced Ridership

There are four steps to estimating induced ridership and they relate to "TOD project" and "No project" scenarios. "Induced ridership" is the difference between the two. To estimate induced ridership caused by a TOD project, program managers developed a model that:

1. identifies land use components of a proposed TOD project (e.g.: office space and day care)
2. defines a "No TOD" scenario (a project without TOD financial participation)
3. assigns trip generation rates for each component use
4. assigns modal splits for each use, reflecting the percent of trips per transportation option (e.g.: transit, auto, bike and walking).

The model distinguishes residential uses by unit size and type. For example, town houses and moderate-income apartments are common types of TOD projects. The model differentiates commercial occupancy at TOD sites by square footage and use. For example, sit-down restaurants, Class "A" office space and childcare centers are common commercial uses found in proposed TODs. The key determiners are location and type of use. For example, apartments generate 6.6 total trips per day, childcare centers generate 70 total trips per 1,000-sq. ft. per day and restaurants generate 140 total trips per 1,000-sq. ft. per day. Transit trips are a percentage of these.

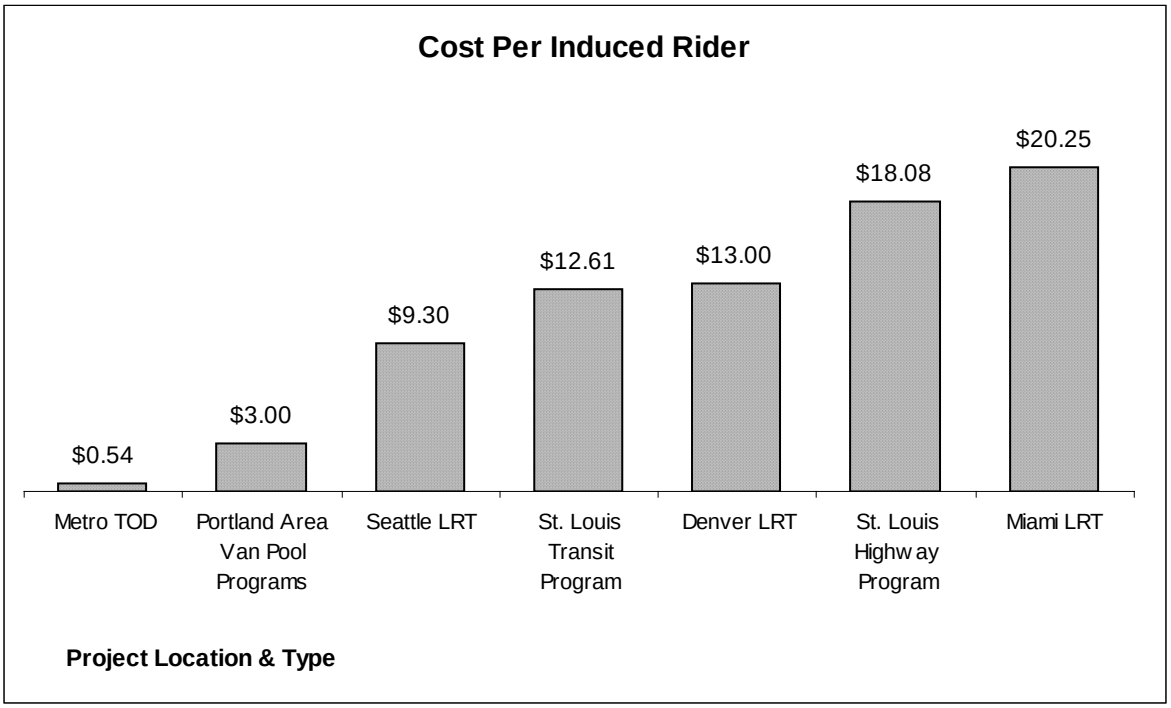
TOD managers define the "No TOD" scenario two ways. One method uses the development program that was proposed by the developer before the project became a TOD. For example, at the Buckman Terrace project, 12 row houses were modeled as the "No TOD" case because that was the developer's approved plan before it became a TOD project. As a TOD project, it was changed to a 5-story, 122-unit project. The second method is used when a development plan is not already in place. In these situations, TOD managers define a typical project that could have been built under specific market conditions and costs.

Cost Per Induced Rider

The cost per induced rider model projects the capital investment required for a TOD project to induce one transit trip. The model is based on cost-effectiveness projections that FTA requires for new capital projects. The formula is simple—TOD managers divide a proposed TOD project's annual induced ridership into the sum of the project's annualized capital costs and annual operating costs. Capital costs are discounted at 7 percent, a FTA requirement that considers opportunity costs of capital and inflation.

TOD projects have an estimated 30-year life. The Metro TOD grant contribution at the Center Commons project was $250,000 and with the addition of technical, legal and administrative expenses make the total Metro investment about $320,000. TOD managers estimated 52,212 induced transit trips annually. Under this model, the annualized project cost is $25,920, or $0.50 per induced rider[1]. This compares well to other capital investments and transportation. By comparison, Seattle's LRT cost per induced rider is $9.30, Denver's LRT cost per induced rider is $13.00 and local vanpools cost per induced rider is $3.00.

The following chart summarizes costs per induced rider and the relative "bang for the buck" for selected transit-related programs.



[1] Calculated as follows: ($250,000 grant plus $70,000 "soft costs" X .081 [multiplier of total costs discounted at 7% for 30 years] ÷ 52,212 [annual induced trips] = cost per induced transit rider)

Response to the Report

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TEL 503 797 1540 | FAX 503 797 1793

METRO

March 6, 2001

The Honorable Alexis Dow
Metro Auditor
600 NE Grand Avenue
Portland, OR 97232-2736

RE: Transit-Oriented Development Program: Improving accountability through enhanced measure of service efforts and accomplishments

Dear Ms. Dow:

Thank you for the opportunity to respond to the SEA audit on our Transit-Oriented Development Implementation Program (TOD Program). I too, believe it very important to identify, measure and record key performance indicators, especially for our innovative and complex programs. I am glad your report acknowledges that the TOD Program managers have developed a clear mission, appropriate goals and objectives, and have made significant progress since the Council authorized the program's startup in April 1998. I have restated your specific recommendations with my responses, and they are included here.

1. **Continue efforts to develop a clear and cohesive framework for SEA measures that demonstrate program accomplishments.**

   Agreement with Recommendation: I agree

   Proposed Action Plan: The TOD program SEA framework will define the following: 1) the purpose of the SEA measure; 2) How the SEA measurement information will be used to manage the TOD program; and 3) responsibilities for developing relevant measures and data collection and reporting methods.

   Proposed Timetable: As noted this effort is already underway, and will be completed by the end of the FY01.

2. **Simplify the measurement process by selecting a limited set of the best, most useful performance measures—the vital few — that address the program's highest priorities.**

   Agreement with Recommendation: I agree

   Proposed Action Plan: The list you propose in Table 5 and of the report was developed in collaboration with Program staff and shall be recommended to the TOD Steering Committee for adoption as the TOD Program Vital List of SEAs.

Proposed Timetable: The next meeting of the TOD Steering Committee subsequent to the publication of your report.

3. Update Data used to measure performance.

Agreement with Recommendation: I agree

Proposed Action Plan: As noted in the report, the program is relatively new and program managers will continue to define the method, frequency and reliability of data collection. The Metro Travel Behavior Study is scheduled for an update in 2002-3 and will include additional sampling from station areas. As stated on page 22 of the report, site specific surveys will be conducted in four years when full mixed-use (MXD) projects are constructed and occupied. We believe that these larger scale MXD projects that include grocery and other services will have a much higher rate of internal trips that are non-auto when compared to a single use TOD project that is more dense, or a smaller MXD project with limited commercial, both of which should have good modal splits for transit.

These larger scale TODs with services within the project should be completed in 2-4 years and they will provide the best data for a TOD to match the model in terms of modal split for transit, walking, biking, auto and other. Notwithstanding the above, the TOD Program will conduct a survey within a year of a smaller scale project that has stabilized, to compare actual data to the model.

The combination of sources of new data will allow comparisons of modal splits for projects that meet the criteria of a TOD, of projects located in station areas, and other projects in the region.

Proposed Timetable: Assuming the proposed vital SEAs are adopted by the TOD Steering Committee, the attached Table A indicates the data required for each SEA and the method and frequency for collecting the data.

Once again, thank you for your diligence on behalf of the citizens of the region.

Best regards,

Mike Burton
Executive Officer

Table A: Proposed Timetable to Update Data used to Measure Performance of TOD Program

Vital SEA	Data Required to Compute	Method of Collection	Frequency of Data Collection
1) Project ridership	▪ ridership generated by specific TOD project	▪ travel behavior survey	▪ subsequent to project stabilization (1-3 years after completion)
2) Increased modal split of transit and non-auto as direct result of TOD project	base case (No TOD) info: ▪ trip generation ▪ modal split ▪ land use distribution ▪ land use intensity	 ▪ ITE ▪ Metro Travel Behavior Survey ▪ real estate market sources ▪ real estate market sources	 ▪ annual ▪ every 6-8 years (next update to be 2002 or 2003) ▪ ad hoc ▪ ad hoc
	TOD project info (projected): ▪ trip generation ▪ modal split ▪ land use distribution ▪ land use intensity	 ▪ ITE ▪ Travel Behavior Survey ▪ project plan ▪ project plan	 ▪ at time of analysis ▪ every 6-8 years ▪ once, during project due diligence ▪ once, during project due diligence
	TOD project info (actual): ▪ trip generation ▪ modal split ▪ land use distribution ▪ land use intensity	for all: ▪ project survey	for all: ▪ subsequent to project stabilization (1-3 years after completion)
3) Number of TOD buildings constructed	▪ TOD project data ▪ market area base case scenario	▪ project plans and building permit ▪ GIS analysis of building permit and tax assessor data	▪ once, during due diligence ▪ once, during due diligence
4) Cost effectiveness	▪ cost effectiveness methodology ▪ induced modal spilt data used for vital SEA #2	▪ literature review of Federally funded transportation project and cost-benefit methodologies promulgated by FTA or USDOT. ▪ see #2 above	▪ annually ▪ see #2 above concerning modal split data
5) 2040 support	▪ 2040 standard ▪ TOD project data ▪ market area base case scenario	▪ review and analysis of 2040 documentation ▪ same as #3 above ▪ same as #3 above	▪ once, during project due diligence ▪ once, during project due diligence ▪ once, during project due diligence

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Thanks for taking the time to help us.

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