



# **The Juniper Ridge Transportation Management Association (JRTMA)**

## **Transportation Demand Management**

### **Business Plan**

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## **Executive Summary**

The Juniper Ridge Transportation Management Association (JRTMA) will be a committee of the Juniper Ridge Employment Subdistrict Owner's Association. The JRTMA will manage the Transportation Demand Management (TDM) component of the Employment Subdistrict bylaws and covenants, conditions and restrictions (CCRs).

Management of the JRTMA will be contracted through the Owners' Association Board of Directors. Funding for the management of the JRTMA will come from the Owners' Association. The manager will work directly with Employment Subdistrict employers to develop and implement TDM Plans. Each employer will be responsible for funding their individual TDM program. The manager will also coordinate TDM efforts across all Employment Subdistrict Employers. The evolution of those district wide efforts will occur over the five years outlined in this Business Plan.

The Business Plan outlines an operating plan and an operating budget for years one through five of the JRTMA. The plan assumes that there will be two employers at the start of year one and that the number of employers will increase by one or two businesses in each year. Also included in the operating plan and budget are goals for expansion of the JRTMA in years four and five. One final goal of the Business Plan is to be prepared for years six and seven with the development of a new business plan.

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## **Juniper Ridge TMA Management**

As outlined in the JRTMA bylaws, the JRTMA will be established as a “Committee” of the Juniper Ridge Employment Subdistrict Owners’ Association. The Owners Association Board of Directors will contract with a third-party organization to (i) act as the TMA Manager and (ii) to execute the Business Plan.

The TMA Manager will work with each company’s Employee Transportation Coordinator (ETC) to develop individual Transportation Demand Management Plans and supplemental Transportation Demand Management Implementation Plans. The manager will also develop the JRTMA Partnership Agreement which will be signed by each employer. It is anticipated that this agreement will ensure that the quarterly reports compiled by each employer will monitor compliance with the Juniper Ridge Phased Trip Cap program.

In addition to the development of plans and agreements, the manager will facilitate and document all meetings of the JRTMA, support employers in the day to day implementation of TDM measures, ensure compliance with the Owners’ Association bylaws and the Juniper Ridge Employment Subdistrict Covenants, Conditions and Restrictions (CCRs) as they pertain to the JRTMA.

## Operating Plan for Year 1, Year 2 and Year 3

### Year One

The Juniper Ridge TMA (“JRTMA”) will begin operations following the close of escrow of the first property sale after July 1, 2010, starting with the identification and retention, by the Juniper Ridge Owners Association, of a TMA Manager. In Year One, each employer located in the Juniper Ridge Employment Subdistrict will sign a Juniper Ridge Transportation Management Association Agreement committing them to completing the following tasks:

- Identify an Employee Transportation Coordinator (ETC);
- Develop a Transportation Demand Management (TDM) Plan;
- Develop a TDM Implementation Plan; and
- Attend quarterly ETC coordination meetings to collaborate on TDM efforts.

The Employee Transportation Coordinator (ETC) is the person designated by each employer to oversee the implementation and monitoring of the company’s TDM program. This person is responsible for attending JRTMA meetings; preparing quarterly reports; assisting employees with program participation; and performing the “primary contact” function at each business for the JRTMA management staff.

The JRTMA Partnership Agreement is a funding agreement between each business operating in the Employment Subdistrict and the JRTMA. This agreement will be developed by the TMA Manager upon startup of operations. The agreement outlines employer responsibilities for participating in JRTMA programs. Along with development of TMA programs, employers will be expected to file quarterly reports; participate in Employment Subdistrict-wide programs such as Commute Options Week; and to actively support the mission of the JRTMA. Quarterly reports will include a component

that ensures monitoring and compliance with the Juniper Ridge Phased Trip Cap program.

As outlined in the JRTMA Bylaws all employers in the Juniper Ridge Employment Subdistrict will develop, in conjunction with JRTMA staff, Transportation Demand Management (TDM) Plans for their company. The plan will outline how the employer anticipates meeting the 10% PM Peak Hour Trip reduction required of all businesses operating within the Employment Subdistrict. Each employer's plan will be updated and renewed on an annual basis. It is expected that strategies identified in these plans will include but not be limited to:

- Employee trip reduction incentive programs;
- Vanpools; and
- Carpools.

In conjunction with the TDM Plan, each employer will also create a Transportation Demand Management (TDM) Implementation and Monitoring Plan. This plan will be an annual outline of the means and methods associated with implementation and monitoring of the TDM Plan. The Implementation Plan will also be updated and renewed annually.

Employee Transportation Coordinators will attend quarterly meetings. Upon startup of operations, the JRTMA will establish regular quarterly meetings for the ETC's to coordinate TDM efforts across all companies operating within the Juniper Ridge Employment Subdistrict.

In addition to the five bulleted tasks, and in an effort to have employers begin to see themselves as a single JRTMA entity, the employers located in Juniper Ridge Employment Subdistrict will identify one strategy, to be implemented in Year Two, that will expand the implementation of TDM plans of each firm.



Strategies may include but are not limited to:

- Holding a bicycle commuter safety course for all Juniper Ridge employees;
- Creating a vanpool that any Juniper Ridge employee can ride, this would be in addition to the individual employer vanpool offerings;
- Hosting a Juniper Ridge Commute Options Week event; or
- Hosting a carpool match day that encourage carpool matches between employees from various Juniper Ridge employers.

In summary, Year One (1) will be the first chance that the Juniper Ridge Employment Subdistrict firms will work together to achieve mutually beneficial TMA goals.

## **Year Two**

In year two, each employer will complete the following tasks:

- Renew its JRTMA Partnership Agreement
- Review and update its TDM Plan with JRTMA staff
- Review and update its TDM Implementation Plan
- Contribute to the implementation of the TDM strategy identified in year one; and
- Where appropriate, apply for an Oregon Business Energy Tax Credit (BETC).

In this year, the employers will identify an additional strategy to be implemented in Year Three (3) to further develop the JRTMA.

The Oregon Business Energy Tax Credit (BETC). The BETC is a tax credit program that is available through the Oregon Department of Energy, to encourage businesses to adopt strategies that reduce energy consumption. The creation and implementation of TDM plans and measures have qualified many Central Oregon businesses for this program.

The BETC tax credit can be used to help fund the employer's TDM program as well as the cost of its implementation. A company must have a TDM program in operation for

twelve months to receive the tax credit. By Year Two, all companies will have had a qualifying program up and running for at least a year.

### **Year Three**

In Year Three, each employer will complete the following tasks:

- Renew their JRTMA partnership agreement
- Review and update its existing TDM Plan with JRTMA staff
- Review and update its TDM Implementation Plan
- Contribute to the implementation of the TDM strategies identified in years one and two;
- Where applicable, reapply for an Oregon Business Energy Tax Credit (BETC); and
- Participate in the development of the Business Plan for years four and five

In Year Three, the TMA Manager will create a Business Plan for JRTMA years four and five, based upon the lessons learned and successes documented in years one through three and on the outline provided in the following section.

## **Operating Plan for Year 4 and Year 5**

### **Year Four**

By Year Four, it will be regular practice for each firm to sign a JRTMA Partnership agreement; review its TDM Plan and review and update its TDM Implementation Plan. These tasks will continue annually throughout the life of the JRTMA as they are foundation of the organization.

In addition to the above mentioned tasks, annual tasks will be added. The primary goal of the additional tasks is to increase the visibility of the Juniper Ridge TMA in the Central Oregon community and to attract new funding sources or commuter resources to the organization. One example would be that JRTMA representatives are actively working with the regional transit authority (Cascade East Transit or Bend Area Transit) to provide adequate transit service to the Employment Subdistrict. Other tasks/strategies may include:

- Identifying opportunities to use the Business Energy Tax Credit (BETC) in ways other than simply funding the management of the TMA;
- Implementing of all three strategies adopted in years one, two and three;
- Holding an annual Juniper Ridge Commute Options Week event;
- Developing an ongoing relationship with other NE Bend employers to coordinate TDM measures for the entire area;
- Beginning to develop the next five-year plan

### **Year Five**

The primary objective for Year Five will be to develop and adopt a new five-year Business Plan. This business plan should at least include the elements included in this plan and strive to incorporate all elements necessary to successfully expand and manage the JRTMA.

In addition to crafting the next five-year plan, the JRTMA employers will complete the following tasks in year five:

- Renew JRTMA Partnership Agreement;
- Review its existing TDM Plan, update if necessary;
- Review and update its TDM Implementation Plan;
- Contribute to the implementation of the TDM strategies identified in years one through three;
- Where applicable, apply for another year of the Oregon Business Energy Tax Credit (BETC);
- Identify opportunities to use the Business Energy Tax Credit (BETC) in ways other than simply funding the management of the TMA;
- Hold an annual Juniper Ridge Commute Options Week event;
- Develop an ongoing relationship with other NE Bend employers to coordinate TDM measures for the entire area

By the end of Year Five, the JRTMA will have four years of solid Transportation Demand Management experience and be able to account numerous success and various lessons learned. Both the successes and lessons learned should be incorporated into the next five-year plan. By this time, the organization will be completely self-managing and perhaps a model for developing other TMAs in Central Oregon.

## **Operating Budget**

The operating budget for the first five years of the JRTMA assumes that the Owners' Association will contract with a third party to (i) act as manager and (ii) execute the Business Plan. The total five-year budget would be \$80,550 for 972 hours of work.

### **Year One Budget**

In Year One, the total cost to manage the JRTMA would be \$16,080 for 194 hours of work. This cost assumes that there would be at least two existing employers and up to two new businesses located in Juniper Ridge Employment Subdistrict. It was assumed that the JRTMA manager would need at least 2 hours per month or 24 hours per year to work with the two existing businesses on their TDM Plans and TDM implementation plans. The manager would need another 24 hours per year to develop the same plans with the two new businesses.

In addition to developing the two TDM Plans with each business, development of the JRTMA Partnership Agreement would require 20 hours. Interaction between the manager and the ETC would include signing of the JRTMA Partnership Agreement and ongoing support of the ETC throughout the year. This level of work would require about three hours per month or 36 hours per year.

The Year One budget also assumes there would be at least 3 quarterly JRTMA meetings and fourth meeting which would be the Owners' Association Annual Meeting. Attendance, preparation and documentation for meetings would require 52 hours per year.

## JRTMA - Year 1

	Project Manager	JRTMA Coordinator	Total
Billing Rate	\$90	\$80	
<b>Task 1: Project Management</b>			
Task 1.A Reporting	12	12	24
Task 1.B Schedule Revisions, as needed	2	5	7
Task 1.C Budget Revisions, as needed	2	5	7
<i>Task 1: Total Hours</i>	16	22	38
<i>Task 1: Total Cost</i>	\$1,440	\$1,760	\$3,200
<b>Task 2: Meeting Coordination</b>			
Task 2.A Organize, facilitate and attend at least 4 JRTMA meetings*	12	12	24
Task 2.B Meeting Record & Documentation	3	25	28
<i>Task 2: Total Hours</i>	15	37	52
<i>Task 2: Total Cost</i>	\$1,350	\$2,960	\$4,310
<b>Task 3: TMA Agreements, Plans, Programming</b>			
Task 3.A Develop a JRTMA Partnership Agreement	5	15	20
Task 3.B Develop TDM Plans - Existing Businesses	2	8	10
Task 3.C Develop Implementation Plans - Existing Businesses	2	12	14
Task 3.D Develop both Plans - New Businesses	4	20	24
Task 3.E Ongoing Coordination with Businesses	12	24	36
<i>Task 3: Total Hours</i>	25	79	104
<i>Task 3: Total Cost</i>	\$2,250	\$6,320	\$8,570
<b>Year 1 Total Hours</b>			
	<b>56</b>	<b>138</b>	<b>194</b>
<b>Year 1 Total Cost</b>			
	<b>\$5,040</b>	<b>\$11,040</b>	<b>\$16,080</b>

\*At least three are JRTMA meetings, the fourth may be an annual OA meeting, as needed

### Year Two Budget

The budget for year two would be \$13,130 for 158 hours of work. It assumes that there will be up to four existing businesses in the Juniper Ridge Employment Subdistrict and one new business. The effort to revise plans with the existing four businesses will be less time consuming than developing the plans in year one, therefore the time required for the revision of both TDM plans for the four existing businesses would be 24 hours for the year. The effort to create a TDM Plan and a TDM implementation plan for the new business would require 12 hours per year. The addition of one business would not change the time needed for coordination and support. The budget also assumes that

there will be four quarterly JRTMA meetings; the time required for this task would be the same as year one, 52 hours.

### JRTMA - Year 2

	Project Manager	JRTMA Coordinator	Total
Billing Rate	\$90	\$80	
<b>Task 1: Project Management</b>			
Task 1.A Reporting	12	12	24
Task 1.B Schedule Revisions, as needed	2	5	7
Task 1.C Budget Revisions, as needed	2	5	7
<i>Task 1: Total Hours</i>	16	22	38
<i>Task 1: Total Cost</i>	\$1,440	\$1,760	\$3,200
<b>Task 2: Meeting Coordination</b>			
Task 2.A Organize, facilitate and attend at least 4 JRTMA meetings	12	12	24
Task 2.B Meeting Record & Documentation	3	25	28
<i>Task 2: Total Hours</i>	15	37	52
<i>Task 2: Total Cost</i>	\$1,350	\$2,960	\$4,310
<b>Task 3: TMA Agreements, Plans, Programming</b>			
Task 3.A Revise TDM Plans - Existing Businesses	2	6	8
Task 3.B Revise Implementation Plans - Existing Businesses	2	10	12
Task 3.C Develop both Plans - New Business	2	10	12
Task 3.D Ongoing Coordination with Businesses	12	24	36
<i>Task 3: Total Hours</i>	18	50	68
<i>Task 3: Total Cost</i>	\$1,620	\$4,000	\$5,620
<b>Year 2 Total Hours</b>	<b>49</b>	<b>109</b>	<b>158</b>
<b>Year 2 Total Cost</b>	<b>\$4,410</b>	<b>\$8,720</b>	<b>\$13,130</b>

### Year Three Budget

In year three, the budget assumes up to five existing businesses in Juniper Ridge and up to two new businesses. Seven businesses would require 48 hours per year to develop new TDM plans and to review and revise existing TDM plans. The addition of two businesses would slightly increase the hours needed to support and coordinate among Juniper Ridge businesses to 45 hours per year.

Also in year three, the operating plan outlines a need to begin to develop a business plan for years four and five. This creates an additional task for the year 3 budget which

will necessitate additional interaction between the manager and the ETCs. The total cost would be \$16,340 for 197 hours of work.

### JRTMA - Year 3

	Project Manager	JRTMA Coordinator	Total
Billing Rate	\$90	\$80	
<b>Task 1: Project Management</b>			
Task 1.A Reporting	12	12	24
Task 1.B Schedule Revisions, as needed	2	5	7
Task 1.C Budget Revisions, as needed	2	5	7
<i>Task 1: Total Hours</i>	16	22	38
<i>Task 1: Total Cost</i>	\$1,440	\$1,760	\$3,200
<b>Task 2: Meeting Coordination</b>			
Task 2.A Organize, facilitate and attend at least 4 JRTMA meetings	12	12	24
Task 2.B Meeting Record & Documentation	3	25	28
<i>Task 2: Total Hours</i>	15	37	52
<i>Task 2: Total Cost</i>	\$1,350	\$2,960	\$4,310
<b>Task 3: TMA Agreements, Plans, Programming</b>			
Task 3.A Revise TDM Plans - Existing Businesses	2	8	10
Task 3.B Revise Implementation Plans - Existing Businesses	2	12	14
Task 3.C Develop both Plans - New Businesses	4	20	24
Task 3.D Ongoing Coordination with Businesses	15	30	45
<i>Task 3: Total Hours</i>	23	70	93
<i>Task 3: Total Cost</i>	\$2,070	\$5,600	\$7,670
<b>Task 4: JRTMA Planning and Growth</b>			
Task 4.A Develop Business Plan for years 4 and 5	4	10	14
<i>Task 4: Total Hours</i>	4	10	14
<i>Task 4: Total Cost</i>	\$360	\$800	\$1,160
<b>Year 3 Total Hours</b>	<b>58</b>	<b>139</b>	<b>197</b>
<b>Year 3 Total Cost</b>	<b>\$5,220</b>	<b>\$11,120</b>	<b>\$16,340</b>

### Year Four Budget

The budget for year four would cost \$17,630 for 213 hours of work. This year it is assumed that the JRTMA will have seven existing businesses and one new business. This would require 58 hours of work per year. The hours need to support and coordinate among eight businesses would be 45 per year.



This is the first year that the budget includes a Task 4: JRTMA Planning and Growth. This year's task four is to introduce and implement Juniper Ridge wide events. This may also include coordinating planning efforts that would impact the future of JRTMA, as outlined in the operating plan for year four.

### JRTMA - Year 4

	Project Manager	JRTMA Coordinator	Total
Billing Rate	\$90	\$80	
<b>Task 1: Project Management</b>			
Task 1.A Reporting	12	12	24
Task 1.B Schedule Revisions, as needed	2	5	7
Task 1.C Budget Revisions, as needed	2	5	7
<i>Task 1: Total Hours</i>	16	22	38
<i>Task 1: Total Cost</i>	\$1,440	\$1,760	\$3,200
<b>Task 2: Meeting Coordination</b>			
Task 2.A Organize, facilitate and attend at least 4 JRTMA meetings	12	12	24
Task 2.B Meeting Record & Documentation	3	25	28
<i>Task 2: Total Hours</i>	15	37	52
<i>Task 2: Total Cost</i>	\$1,350	\$2,960	\$4,310
<b>Task 3: TMA Agreements, Plans, Programming</b>			
Task 3.A Revise TDM Plans - Existing Businesses	3	10	13
Task 3.B Revise Implementation Plans - Existing Businesses	3	20	23
Task 3.C Develop both Plans - New Businesses	2	20	22
Task 3.D Ongoing Coordination with Businesses	15	30	45
<i>Task 3: Total Hours</i>	23	80	103
<i>Task 3: Total Cost</i>	\$2,070	\$6,400	\$8,470
<b>Task 4: JRTMA Planning and Growth</b>			
Task 4.A Introduce and Implement JR wide events	5	15	20
<i>Task 4: Total Hours</i>	5	15	20
<i>Task 4: Total Cost</i>	\$450	\$1,200	\$1,650
<b>Year 4 Total Hours</b>			
	<b>59</b>	<b>154</b>	<b>213</b>
<b>Year 4 Total Cost</b>			
	<b>\$5,310</b>	<b>\$12,320</b>	<b>\$17,630</b>

### Year Five Budget

The year five budget would cost \$17,370 for 210 hours of work. This cost assumes that there would be up to eight existing business in Juniper Ridge. It also anticipates continued implementation of Juniper Ridge wide events and the development of a business plan for years six and seven.

## JRTMA - Year 5

	Project Manager	JRTMA Coordinator	Total
Billing Rate	\$90	\$80	
<b>Task 1: Project Management</b>			
Task 1.A Reporting	12	12	24
Task 1.B Schedule Revisions, as needed	2	5	7
Task 1.C Budget Revisions, as needed	2	5	7
<i>Task 1: Total Hours</i>	16	22	38
<i>Task 1: Total Cost</i>	\$1,440	\$1,760	\$3,200
<b>Task 2: Meeting Coordination</b>			
Task 2.A Organize, facilitate and attend at least 4 JRTMA meetings	12	12	24
Task 2.B Meeting Record & Documentation	3	25	28
<i>Task 2: Total Hours</i>	15	37	52
<i>Task 2: Total Cost</i>	\$1,350	\$2,960	\$4,310
<b>Task 3: TMA Agreements, Plans, Programming</b>			
Task 3.A Revise TDM Plans - Existing Businesses	1	8	9
Task 3.B Revise Implementation Plans - Existing Businesses	1	16	17
Task 3.C Develop both Plans - New Businesses	1	10	11
Task 3.D Ongoing Coordination with Businesses	15	30	45
<i>Task 3: Total Hours</i>	18	64	82
<i>Task 3: Total Cost</i>	\$1,620	\$5,120	\$6,740
<b>Task 4: JRTMA Planning and Growth</b>			
Task 4.A Introduce and Implement JR wide events	4	10	14
Task 4.B Develop Business Plan for Years 6 & 7	4	20	24
<i>Task 4: Total Hours</i>	8	30	38
<i>Task 4: Total Cost</i>	\$720	\$2,400	\$3,120
<b>Year 5 Total Hours</b>			
	<b>57</b>	<b>153</b>	<b>210</b>
<b>Year 5 Total Cost</b>			
	<b>\$5,130</b>	<b>\$12,240</b>	<b>\$17,370</b>

## Five-Year Budget

The total for the five-year budget would be \$80,550 and would provide 972 hours of consultant work. The five-year budget will be revised after year one of operations. The budget for years two through five may be revised based on actual operating expenses incurred that year.

### JRTMA Operating Budget for Years 1 - 5

	Project Manager	JRTMA Coordinator	Total
Billing Rate	\$90	\$80	
Year 1 Total Hours	56	138	194
Year 1 Total Cost	\$5,040	\$11,040	\$16,080
Year 2 Total Hours	49	109	158
Year 2 Total Cost	\$4,410	\$8,720	\$13,130
Year 3 Total Hours	58	139	197
Year 3 Total Cost	\$5,220	\$11,120	\$16,340
Year 4 Total Hours	59	154	213
Year 4 Total Cost	\$5,310	\$12,320	\$17,630
Year 5 Total Hours	57	153	210
Year 5 Total Cost	\$5,130	\$12,240	\$17,370
<b>Year 1 - 5 Total Hours</b>	<b>279</b>	<b>693</b>	<b>972</b>
<b>Year 1 - 5 Total Cost</b>	<b>\$25,110</b>	<b>\$55,440</b>	<b>\$80,550</b>