



Measure M Five Year Comprehensive Assessment and Equity Report

Finance, Budget & Audit Committee - October 18, 2023

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Metro

Report Overview

- Interim “lookback” on Measure M progress
- Financial analysis, implementation updates and impacts on people
- Recommendations aligned with Board-approved assessment objectives

KEY OBSERVATIONS

Each page also includes key observations with an assessment of how well that item is going.

More of This

Program, project or progress deemed successful and Metro should continue implementation strategies

Checking In

Program, project or process is new or still underway and worth revisiting in future assessments

Adapting

Program, project or progress should adapt or continue adapting to forces affecting anticipated outcomes

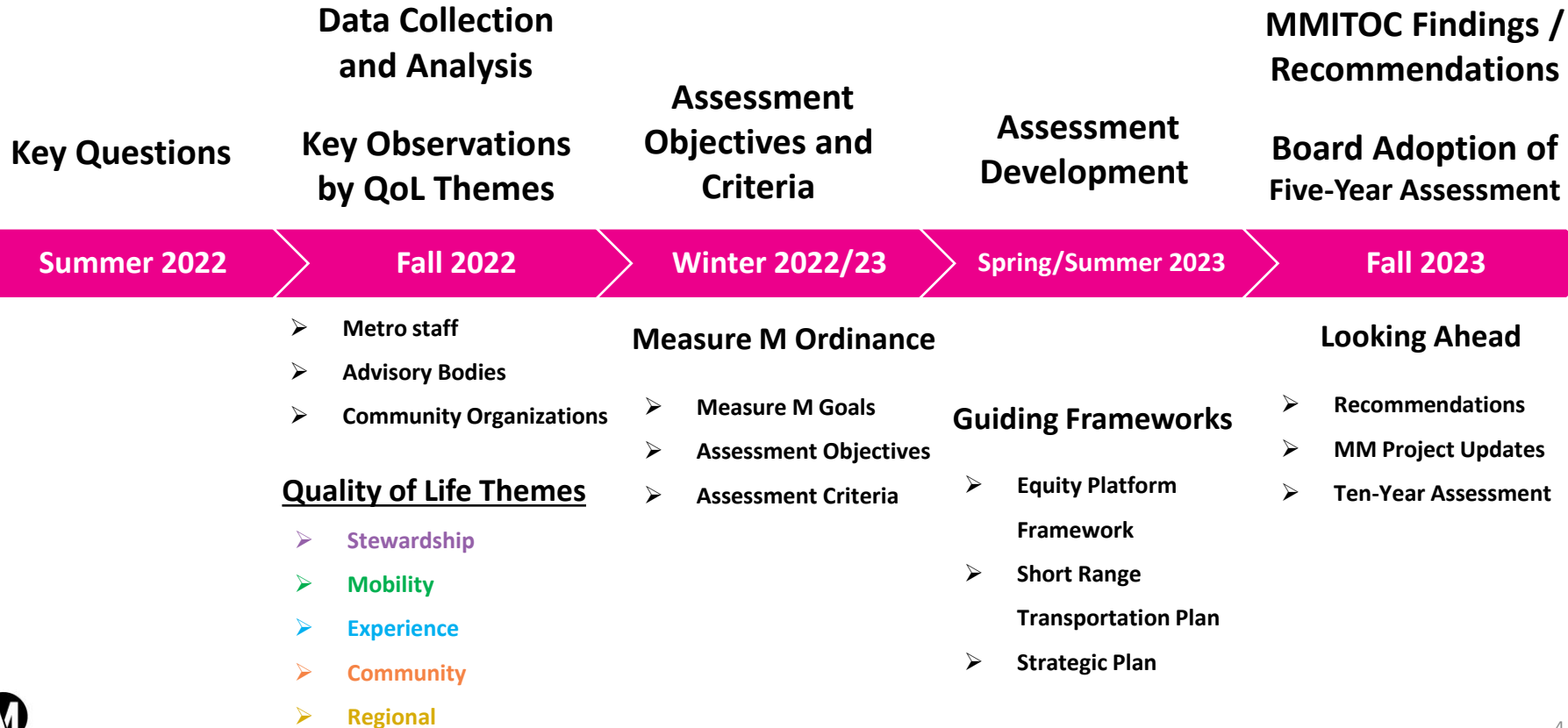


Board Approved Assessment Objectives

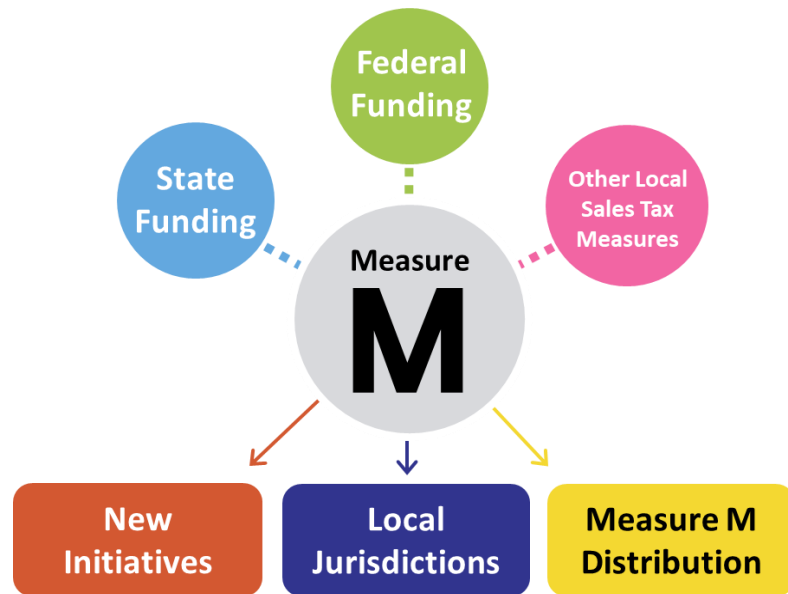
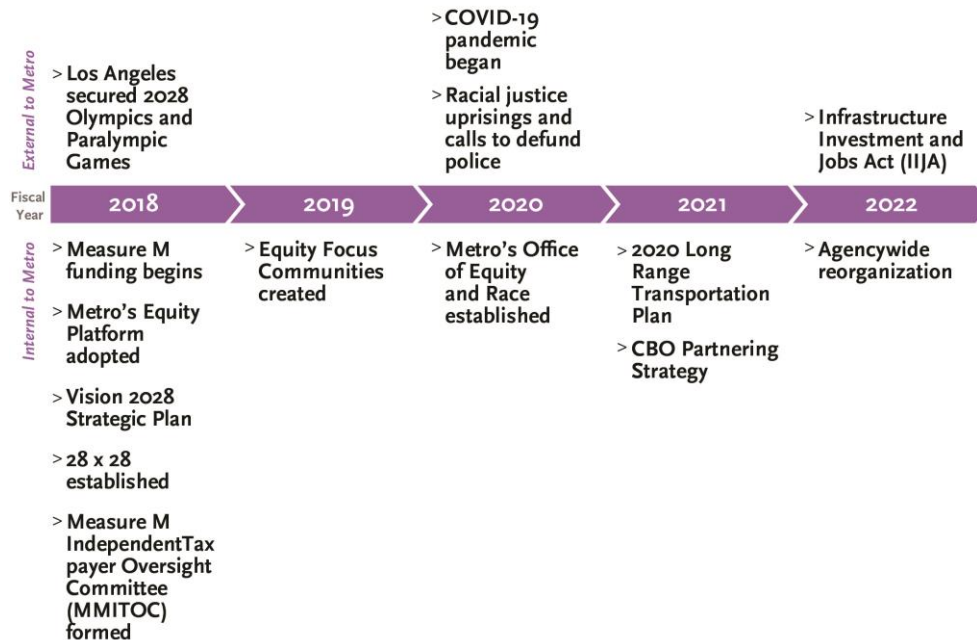
- Assess Metro's performance on the **efficiency and effectiveness** in delivering Measure M projects and programs
- Identify and evaluate any **potential barriers** in the delivery of the Expenditure Plan
- Identify and evaluate opportunities for **process improvement**
- Identify and evaluate **best practices** to be used going forward
- Identify and evaluate any **organizational changes** needed to improve coordination



Assessment Process



Measure M Conditions



Illustrative figure; modified from Assessment
Figure 1.2, Page 25



Measure M Investments and EFCs

Measure M Capital Project Investments FY 18-22

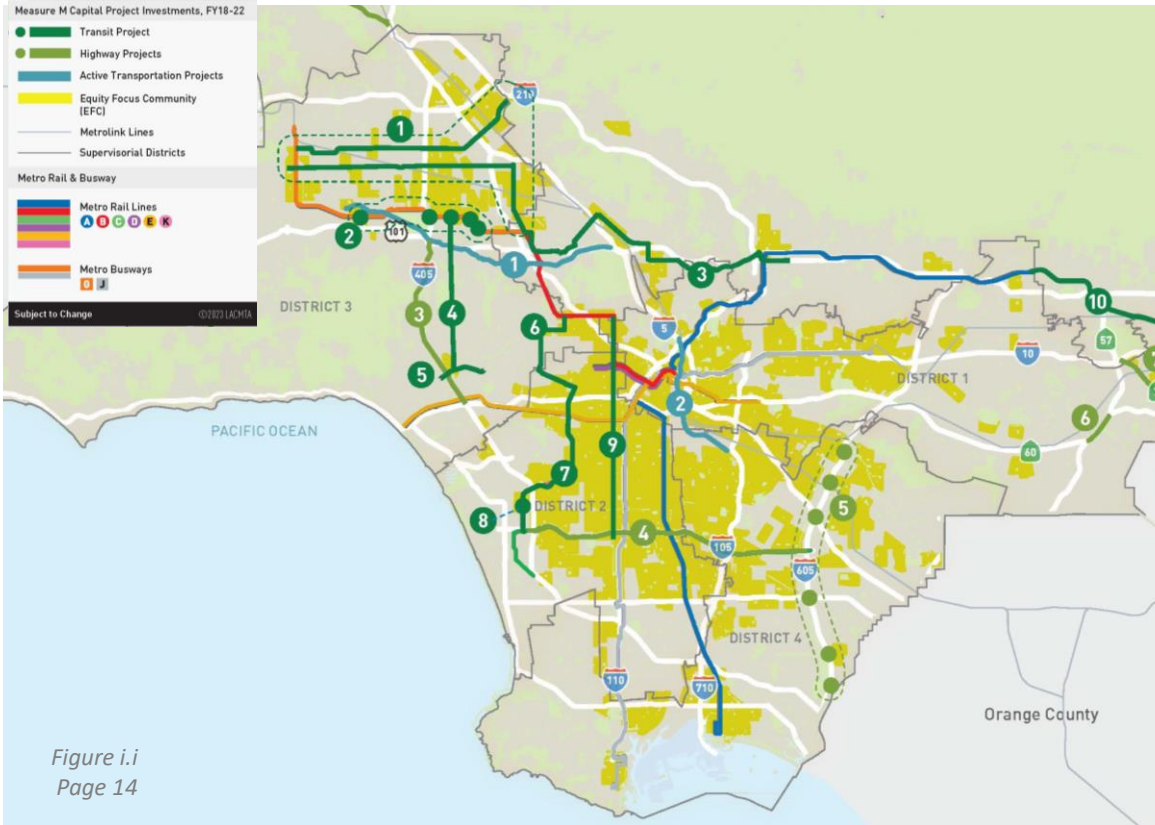


Figure i.i
Page 14

- MM Transit Projects are located in close proximity at higher rates to lower income residents
- MM Transit and AT Projects are located in close proximity at higher rates to lower wage jobs
- Need to translate proximity to access and impacts

Figure 5.6
Page 111

Measure M Project Cost Growth in 5-year Period

Under Construction

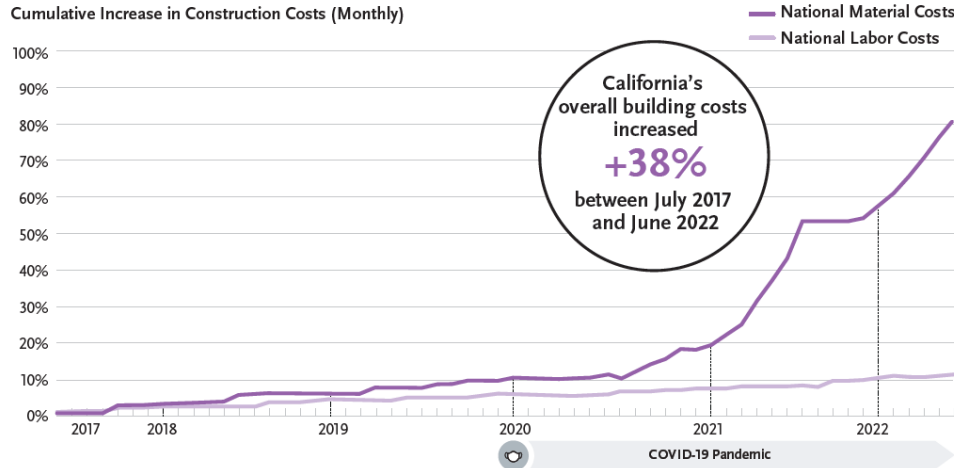
	Percentage Change
Airport Metro Connector 96th St. Station - Green Line Ext LAX	43%
Westside Purple Line Extension Section 3	22%
I-5 North Capacity Enhancements (SR-14 to Lake Hughes Rd)	(18%)
Gold Line Foothill Extension to Claremont (2B)	28%
SR-71 Gap from I-10 to Rio Rancho ²	48%

Updates as of end of FY 2022; subject to further adjustments.



Project cost increases have primarily been driven by material and labor escalation, scope growth, and new contingency forecast methodology that aligns with FTA guidelines.

National Construction Cost Increases



Alternative Project Delivery methods bring early collaboration and adaptable project implementation; anticipated to reduce change orders and future LOP budget impacts

Early Intervention Team engages the full agency in early discussions to address project risks and cost drivers

Recap of Report Assessment & Recommendations



Objective Category

Assessment Summary

Recommendation Summary



Objective Category

Project delivery risks arise during environmental phase or due to staffing challenges and result in project cost increase

Continue to: prioritize hiring/retention, reassess project baselines, and assess effectiveness of capital program cost control strategies



Objective Category

Interim assessment highlights need for internal and external collaboration improvements, building on work of Early Intervention Team

Coordination, documentation and partnerships to reduce schedule and cost risks; document community engagement influence on projects



Objective Category

Metro has existing best practices and has embarked on newer strategies in response to changing conditions and disruptions

Metro should expand on data measurement and transparency efforts, continue to identify ways to improve third party coordination to reduce schedule and cost risk



Objective Category

Metro has worked to strengthen its core asset: people (labor, staff, partners)

Increase focus on data sharing, shared performance indicators and interdepartmental efforts to meet regional targets



Recap of MMITOC Findings & Recommendations

Program Area	Background/Finding Summary	MMITOC Member Recommendation Summary	Staff Recommended Action Summary
Operations and Maintenance	<ol style="list-style-type: none"> 1. O&M funds for municipal transit providers are not provided metrics or tracked 2. O&M costs are done in environmental clearance process but not updated 3. Junctions at specific locations need to be improved but Measure M does not have line items for these 	<ol style="list-style-type: none"> 1. Establish a dashboard with efficiency and effectiveness indicators for each provider 2. Recommends yearly realistic and updated O&M expenditures be provided to budgeting for MM projects expected to open within 5 years 3. Recommends analysis of improvement options at these locations and program the necessary expenditures 	<ol style="list-style-type: none"> 1. Work with MMITOC to establish transparent reporting of O&M funds for municipal providers 2. Addressed in report recommendations, p. 114 3. Conduct analysis to determine feasible improvements and funding eligibility
Highway, Active Transportation, Complete Streets	Complete Streets not measured in this report.	N/A	Addressed in report recommendations, p.116
Active Transportation	At present, Active Transportation Funds can only be used for capital improvements, i.e., new construction, not improvements to any existing bikeways	Recommends allowance of Active Transportation funds to be used for repaving, safety enhancements, and widening of an existing bikeway	Identify limitations to Measure M Active Transportation funds and determine eligible investment expenditures to address this

Thank You!