

SPECIAL FARE ZONE APPLICATION PROCEDURE

The process is begun when an applicant submits, to Tri-Met, a letter of intent to apply for a special fare zone. Tri-Met will schedule a meeting between the applicant, Tri-Met, and the appropriate jurisdiction, to discuss the letter of intent and the process involved in establishing a special fare zone. A team will be established with members from the applicant, Tri-Met, and the local jurisdiction, to aid the proposer in developing the information necessary for the Formal Application. The Formal Application is a three step process: Preliminary Application, Operational and Financial Analysis, and Final Analysis of Implementing Criteria.

1. Preliminary Application - Step 1

- The applicant takes the lead in developing and providing the appropriate information. The team will assist, as needed. If necessary, the team can request assistance in the form of an outside consultant. The consultant will be paid for through funds collected equally from Tri-Met, the local jurisdiction, and the applicant.
- The completed Preliminary Application is reviewed by Tri-Met's internal Fare Policy Committee. The Committee may request additional information if it is needed in order to adequately evaluate the application. The Committee reviews the Preliminary Application to determine if it adequately addresses Implementing Criteria 1 through 5, and forwards a discussion paper to Tri-Met's Executive Office.
- Upon consent of Tri-Met's Executive Office, the Committee brings the Preliminary Application to the Tri-Met Board of Directors for further discussion. Upon consent of the Board, the process moves into the Operational and Financial Analysis.

2. Operational and Financial Analysis - Step 2

- This step will be completed primarily by Tri-Met staff, in concert with the team members. If necessary, the team can request an outside consultant be hired to assist with the development of information for the application. The consultant would be paid for through funds collected equally from Tri-Met, the local jurisdiction, and the applicant.
- The completed Operational and Financial Analysis is reviewed by Tri-Met's Fare Policy Committee. The Committee may request additional information if it is needed in order to adequately evaluate the Analysis. The Committee reviews the Operational and Financial Analysis to determine if it adequately addresses Implementing Criteria 6 and 7, and forwards a discussion paper to Tri-Met's Executive Office.
- Upon consent of Tri-Met's Executive Office, the Committee brings the Operational and Financial Analysis to the Tri-Met Board of Directors for further discussion. Upon

consent of the Board, the process moves into the Final Analysis of the Implementing Criteria.

3. Final Analysis of Implementing Criteria - Step 3

- The Fare Policy Committee and team members jointly evaluate the information from the Formal Application to determine how well it addresses the Implementing Criteria (1 through 7). A final report is prepared by the Committee and team, discussing the proposal and making a recommendation on the proposal. The recommendation will include the timing of implementation of the Special Fare Zone and any conditions of approval, such as implementation of mitigation measures. The intent is to have concurrence between the Fare Policy Committee and the Team members on a recommendation. If there is not agreement, the report will come from the Fare Policy Committee with a separate report from the team.
- Upon consent of Tri-Met's Executive Office, the Fare Policy Committee brings the proposal to the Tri-Met Board of Directors for further discussion. Upon consent of the Tri-Met Board of Directors the proposal is taken to the public for comment.
- Based on the findings and public comment, Tri-Met's Executive Office makes a final report and recommendation to the Tri-Met Board of Directors. Upon consent of the Tri-Met Board of Directors, a formal public hearing(s) will be held. The Tri-Met Board of Directors will approve or deny the application.