HART
HONOLULU AUTHORITY for RAPID TRANSPORTATION

BALANCED SCORECARD

Project Implementation/Pre-Revenue Operation

Comments and Legend

- On track or ahead of plan.
- Monitoring.
- Monitoring; Requires special attention.
- Immediate attention needed; Requires recovery/resolution.
- No current target/activity to date; Action pending.
- N/A Not Applicable.
- TBD To be determined.
- New Balanced Scorecard items are shaded in blue for ease of identification.
- Status color changes are shaded in yellow.

For Project Finances, reporting will be based on Current Quarter, Fiscal Year, FFGA Financial Plan and Inception to Date data as appropriate.

		Activity	Time Period	*Actual*	*Plan*	*Variance*	*Status*	Comments
1	*Financials*	**Project Finances**						
2		**Operating Budget** [Negative = below Plan]						
3		Operating Expenditures	**Current Quarter (Q2 FY15)** Oct., Nov., Dec. 2014	$4.3	$5.4	($1.1)		For Current Quarter monitoring purposes: $21.5M FY15 Total Budget/4 quarters = $5.37M. The Plan number for Inception to Date = the FY12 to Q2 FY15 budgets + actual expenditures for fiscal years 2007 through 2011. The Plan number for the Financial Plan = the FY12 to Q2 FY15 budgets + actual expenditures for Oct. 16, 2009 through FY11. *Inception is from January 2007 when GET surcharge revenue, interest revenue and expenditures were first reported in the City's FY2007 Comprehensive Annual Financial Report (CAFR) in the Transit Fund which also includes expenditures for other City Departments (e.g., DPP for TOD expenditures, BFS and City Council which were paid with GET surcharge revenues).
4			**FY2015 Total** July 2014 - Dec. 2014	$6.6	$10.7	($4.1)		
5			**FFGA Financial Plan** Oct. 16, 2009 - Dec. 2014	$67.4	$86.3	($18.9)		
6			**Inception* to Date** Jan. 2007 - Dec. 2014	$71.3	$90.2	($18.9)		
7		**Capital Budget** [Negative = below Plan]						
8		Capital Expenditures	**Current Quarter (Q2 FY15)** Oct., Nov., Dec. 2014	$138.6	$236.8	($98.2)		Plan amounts are per the Full Funding Grant Agreement Financial Plan. *Inception is from January 2007 when GET surcharge revenue, interest revenue and expenditures were first reported in the City's FY2007 Comprehensive Annual Financial Report (CAFR) in the Transit Fund. The Plan numbers for Inception to Date = the Plan amounts from 10/16/2009 to 12/31/2014 + actual expenditures for fiscal year 2007 through 10/15/2009. The expenditures for fiscal years 2007 to 2011 were reconciled to the expenditures reported in the Transit Fund included in the City's CAFR report. The "Current Quarter" and "FY15 Total" actual amounts are on a cash basis. All audit adjustments for the previous years are now reflected in the "FFGA Financial Plan" and "Inception to Date" actual amounts. Actual expenditure amounts continue to be below plan due to contractor work lagging and schedule of milestones billing. HART is working with contractors to ensure timely payment. The rebaselining of the Master Project Schedule was completed in summer 2014. Due to unfavorable bids for the West Side Station Group package, HART is re-examining the packaging in the original plan and revamping the schedule. The procurement strategy is also being modified to improve bid response and quality.
9			**FY2015 Total** July 2014 - Dec. 2014	$275.2	$459.6	($184.4)		
10			**FFGA Financial Plan** Oct. 16, 2009 - Dec. 2014	$1,293.5	$2,619.4	($1,326.0)		
11			**Inception* to Date** Jan. 2007 - Dec. 2014	$1,377.0	$2,703.0	($1,326.0)		
12		**Revenues** [Negative = below Plan]						
13		*GET Collections*						
14		Net GET Surcharge Receipts	**Current Quarter (Q2 FY15)** Oct., Nov., Dec. 2014	$48.5	$53.8	($5.3)		GET receipts are reported on a cash basis. The $49M received in October 2014 is for the July-September 2014 quarter. The Current Quarter plan is based on annual reporting. $3,291M = Total Net GET Surcharge revenue forecast for FYs 2010-2023. Actual amounts from inception are the collections from January 2007 to 10/31/2014. The $1,387M Plan amount is equal to the Financial Plan amount of $1,009M from the Project Start date of 10/16/2009 to 10/31/2014 plus $378M collected prior to the Project Start Date. GET surcharge revenue collected prior to October 16, 2009 is included in the Financial Plan as beginning cash balance of $298M (actual GET collections of $378M before October 16, 2009, less expenditures of $80M during that same period). *Inception is from January 2007 when GET surcharge revenue, interest revenue and expenditures were first reported in the City's FY2007 Comprehensive Annual Financial Report (CAFR) in the Transit Fund.
15			**FY2015 Total** July 2014 - Dec. 2014	$98.0	$111.5	($13.5)		
16			**FFGA Financial Plan** Oct. 16, 2009 - Dec. 2014	$967.8	$1,008.7	($40.9)		
17			**Inception* to Date** Jan. 2007 - Dec. 2014	$1,346.2	$1,387.1	($40.9)		
18		*Federal Grants*						
19		Federal Grant Funds New Starts §5309 (Reimbursed)	**Current Quarter (Q2 FY15)** Oct., Nov., Dec. 2014	$56.4	$0	+$56.4		Forecasted FTA Uses by fiscal years per HART's 6/2012 Financial Plan are FY2011 $21M; FY2012 $99M; FY2013 $258M, FY2014 $442M, and thru Q2 FY2015 $0M: Total $820M. The Q3 FY2015 New Starts award is expected to be $250M. The variance for FFGA Financial Plan indicates the prior fiscal years' appropriated amounts not yet used. HART submitted a request for FTA reimbursement in Q2 FY2015 for delay claim payments.
20			**FY2015 Total** July 2014 - Dec. 2014	$56.4	$0	+$56.4		
21			**FFGA Financial Plan** Oct. 16, 2009 - Dec. 2014	$312.3	$820.0	($507.7)		
22		Federal Grant Funds §5307 (Reimbursed)	**Current Quarter (Q2 FY15)** Oct., Nov., Dec. 2014	---	---	N/A		Total forecasted §5307 funds per the plan is $210M.
23			**FY2015 Total** July 2014 - Dec. 2014	---	---	N/A		
24			**FFGA Financial Plan** Oct. 16, 2009 - Dec. 2014	---	---	N/A		

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Monitoring. | No current target/activity to date; Action pending.
Monitoring; Requires special attention. | N/A Not Applicable. | TBD To be determined.
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For the remainder of the Balanced Scorecard, reporting will be based on Current Quarter and Inception to Date data.

		Activity	Current Quarter (Q2 FY15)				Inception to Date				
			October, November, December 2014				January 2007 - December 2014				
			Actual	Plan	Variance	Status	Actual	Plan	Variance	Status	
25	Financials (Continued)	**Project Budget**									
26		FFGA Baseline Project Budget	N/A	N/A	N/A	○	$5,122	$5,122	N/A	●	$M FFGA Baseline Project Budget (including contingencies and FTA-eligible finance charges), in accordance with FTA New Starts project guidelines.
27		Committed ($)	$40	----	----	●	$2,930	$4,425	($1,495)	●	$M Total Committed (awarded Contract Values + approved Change Orders) this quarter and to date vs. the current Total FFGA Project Budget, excluding remaining contingencies and finance charges. Contract awards have been shifted to future years due to AIS delays and the repackaging of contracts. A new baseline budget is being created. HART is implementing mitigation measures to maintain a late 2019 full revenue service date.
28		Committed (%)	0.9%	----	----	●	66.2%	----	N/A	●	% $M Committed of the Inception to Date current Plan FFGA Project Budget, excluding contingencies and finance charges.
29		Incurred ($M)	$171	----	----	●	$1,341	$4,425	($3,084)	●	$M Incurred (Expenditures + approved Requests for Payment) this quarter and to date vs. the current Total FFGA Project Budget, excluding remaining contingencies and finance charges. The plan is based on the original program cost curve issued in 2009 and is projected to be rebaselined in mid-2015. HART is implementing mitigation measures to maintain a late 2019 full revenue service date. The amounts reflected are due in part to the construction delays.
30		Incurred (%)	4%	----	----	●	30%	----	----	●	% $M Incurred (Expenditures + approved Requests for Payment) of the Inception to Date current Plan FFGA Project Budget, excluding contingencies and finance charges.
31		Estimate at Completion (EAC)	N/A	N/A	N/A	●	$5,715	$5,122	N/A	●	$M current forecasted vs. original Estimate at Completion (EAC = contract values as budgeted or awarded + executed change orders + pending and potential changes). Forecast includes revised cost estimates for future construction contracts projecting higher than their respective FFGA Budget. Status for Inception to Date has changed from green to red.
32		**Contingency**									
33		Allocated Cost Contingency	($11)	N/A	N/A	●	$472	$542	($69)	●	Current Quarter = Allocated Project Contingency debited or credited for the quarter, Inception to Date = Current Budget Allocated Project Contingency vs. the Baseline Budget Allocated Project Contingency. Revised cost estimates for future construction contracts includes additional contingency required for those contracts. Status for Current Quarter and Inception to Date have changed from green to orange.
34		Unallocated Cost Contingency	($16)	N/A	N/A	●	$51	$102	($50)	●	Current Quarter = Unallocated Project Contingency debited or credited for the quarter, Inception to Date = Current Budget Unallocated Project Contingency vs. the Baseline Budget Unallocated Contingency. Revised cost estimates for future construction contracts includes additional contingency required for those contracts. Status for Current Quarter and Inception to Date have changed from green to orange.
35		*Total Project Cost Contingency = Allocated + Unallocated*	*($26)*	*N/A*	*N/A*	●	*$524*	*$644*	*($120)*	●	*See the HART Monthly Progress Report for more detailed information on contingency.* *Current Quarter = Total Project Contingency usage, Inception to Date = Current Budget Project Contingency value vs. Baseline Budget Project Contingency. Revised cost estimates for future construction contracts includes additional contingency required for those contracts.* *Status for Current Quarter and Inception to Date have changed from green to orange.*
36		Schedule Contingency	0	N/A	N/A	●	6	20	(14)	●	Schedule contingency has been depleted due to the postponement of guideway construction on the west caused by delays and due to the modification of the project delivery method on future construction contracts. Status for the Current Quarter and Inception to Date have changed from green to orange.
37	Project Progress	**PROJECT DELIVERY - OVERALL**									
38		**Overall Progress** [Positive = ahead of Late Plan; Negative = behind Late Plan]									
39		Overall Project Progress Completed	3.6%	5.0%	(1.4%)	●	31.0%	35.7%	(4.7%)	●	% Complete of Final Design and Construction contracts (FD, DBB-DBOM design levels-of-effort and DB, DBB, DBOM and E/E construction) actual vs. late plan. Revised project schedules for WOFH, MSF and KHG have been incorporated into the overall project progress curve and the interim opening will likely be 2018. HART has canceled the solicitation to build the first nine rail stations. The bids received came in higher than HART had budgeted. HART has repackaged the original contract into three smaller contracts. HART has canceled the solicitation for the Airport-City Center Guideway and Utilities Construction Contract and the delivery method for all construction on the east is under evaluation.
40		Overall Design Progress Completed	2.6%	5.5%	(2.9%)	●	82.0%	86.2%	(4.2%)	●	% Complete of Final Design contracts & DB-DBOM design levels-of-effort actual vs. late plan. Design is progressing satisfactorily in support of the planned bid dates. The design progress schedule has been rebaselined and the interim opening will likely be 2018. Due to bids coming in higher than HART had budgeted, HART has canceled the solicitation to build the first nine rail stations. Value Engineering and design modifications are being performed.
41		Overall Construction Progress Completed	3.8%	4.8%	(1.0%)	●	23.0%	27.9%	(4.9%)	●	% Completion of Construction (DB, DBB, DBOM & E/E) contracts vs. planned. The construction progress schedule has been rebaselined and includes revised project schedules for WOFH, MSF and KHG DB contracts. HART has canceled the solicitation to build the first nine rail stations due to the bids coming in higher than HART had budgeted. HART has repackaged the original contract into three smaller contracts. The change will likely delay by one year the planned opening of the first ten miles of the rail system between Aloha Stadium and east Kapolei. HART has canceled the solicitation for the Airport-City Center Guideway and Utilities Construction Contract and the delivery method for all construction on the east is under evaluation.
42		Overall Utility Progress Completed	1.6%	3.9%	(2.3%)	●	12.1%	13.8%	(1.7%)	●	% Completion of Utilities progress based on the weighted average progress of the Design-Build and Design-Bid-Build utilities level of effort.

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		Activity	Current Quarter (Q2 FY15) October, November, December 2014				Inception to Date January 2007 - December 2014				Comments
			Actual	Plan	Variance	Status	Actual	Plan	Variance	Status	
43	Project Progress (continued)	**Contracts Awarded**									
44		Total Number of Contracts Awarded	0	0	-0-	Monitoring	38	38	-0-	Monitoring	The plan numbers are based off of the FTA Full Funding Grant Agreement Contract Packaging Plan (CPP) contracts. Contracts awarded: N/A Note: HART has canceled the solicitation for the Westside Stations Group Construction Contract due to the bids coming in higher than budgeted. HART has repackaged the original contract into three smaller contracts. The change will likely delay the interim opening by one year.
45		Total Value of Contracts Awarded	$0.00	$0.00	$0	Monitoring	$3,173.77	$3,240.17	($66.4)	Monitoring	$M Awarded. Variance includes contingency. HART has canceled the solicitation for the Westside Stations Group Construction Contract due to the bids coming in higher than budgeted. HART has repackaged the original contract into three smaller contracts in order to reduce risk to the contractors and thereby reduce costs. For a full list of contracts awarded, please see the HART Monthly Progress Report.
46		**Change Orders**									
47		Change Orders (#)	24	N/A	N/A	Monitoring	171	N/A	N/A	Monitoring	# Change Orders executed this quarter (11 Final Design and 13 Construction). These change orders reflect the Notice to Proceed and AIS delays.
48		Change Orders ($)	$29.3	N/A	N/A	Monitoring	$348.6	N/A	N/A	Monitoring	$M Change Orders executed this quarter ($3.5M Final Design and $25.8M Construction). These change orders are reducing our allocated and unallocated contingency. The most significant changes during the second quarter were $15M (DB-120) for Escalation due to schedule impact; ($10.5M) (DBOM-920) Adjustment credit, the Deletion of Ticket Vending Machines (TVM); $8.5M (DB-200) Escalation due to schedule impact.
49		**Claims**									
50		Claims Filed	0	0	N/A	No current target/activity to date; Action pending	0	0	N/A	No current target/activity to date; Action pending	# Claims filed vs. anticipated.
51		Claims Resolved	0	0	N/A	No current target/activity to date; Action pending	0	0	N/A	No current target/activity to date; Action pending	# Claims resolved vs. filed.
52		**Agreements***									**Inception to Date Plan numbers vary each quarter due to advancement of design.*
53		Utility Agreements - Engineering Services	0	0	-0-	On track or ahead of plan	28	28	0	On track or ahead of plan	Inception to Date Plan = total number of agreements planned for the project WOFH - all 9 agreements executed. KHG - all 10 agreements executed. KHG/Airport/City Center - 1 agreement executed. Airport/City Center - all 8 agreements executed. Revised total number of agreements; determined that an Engineering Services Agreement with Sandwich Isle Communication was not necessary.
54		Utility Agreements - Construction Agreement	3	4	(1)	Monitoring; Requires special attention	15	23	(8)	Monitoring; Requires special attention	Inception to Date Plan = total number of agreements planned for the project WOFH - all 7 agreements executed. KHG - all 6 agreements executed. Airport - 2 of the 4 planned are executed. City Center - 0 of the 6 planned are executed. Revised planned number of construction agreements for City Center to 6, after review of plans and consultation with utility owners.
55		*Total Utility Agreements*	*3*	*4*	*(1)*	Monitoring	*43*	*51*	*(8)*	Monitoring	*Inception to Date Plan = total number of agreements planned for the project* *WOFH - all 16 agreements executed.* KHG - *all 16 executed.* *KHG/Airport/City Center ESA - 1 agreement planned/executed.* *Airport/City Center ESA - all 8 agreements executed.* *Airport Construction - 2 agreements executed (4 agreements planned).* *City Center Construction- 0 agreements executed (6 agreements planned).* *The status is based on the potential for construction to be delayed.*
56		HDOT Master Agreements/Joint Use & Occupancy	0	0	-0-	On track or ahead of plan	2	2	0	On track or ahead of plan	Inception to Date Plan = total number of agreements planned for the project WOFH and a combined Master Agreement for KHG, Airport and City Center sections are executed.

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		Activity	Current Quarter (Q2 FY15)				Inception to Date				Comments
			October, November, December 2014				January 2007 - December 2014				
			Actual	Plan	Variance	Status	Actual	Plan	Variance	Status	
57	Project Progress (continued)	Third-Party Agreements	2	5	(3)	Immediate attention needed; Requires recovery/resolution.	5	25	(20)	Immediate attention needed; Requires recovery/resolution.	Data is current as of Dec. 29, 2014. Inception to Date Plan = total number of agreements planned for the project High priority agreements which could impact ongoing construction are in **bold and in red**. A master agreement and its ancillary agreements are counted as one entity. They were previously counted individually. City memorandum of agreements have also been included. ***AGREEMENTS NEEDED FOR CONSTRUCTION – YET TO BE COMPLETED*** **WOFH, KHG, Airport:** **-U.S. Navy Easement Agreements** **WOFH:** **-LCC (UH Leeward Community College)** **-UHWO (UH -West O'ahu)** **-DPP (City Parks & Recreation) for MSF drainage** **KHG:** **-UH Urban Gardens** **-Aloha Stadium** **Airport:** -U.S. Post Office Honolulu Processing Center -DTS (City Dept. of Transportation Services) for Middle Street **City Center:** -HCC (UH Honolulu Community College) -OCCC (Dept. of Public Safety) -GSA/Federal Court House -HCDA (Hawaii Community Development Authority) -DAGS/DBEDT/HHFDC -DFM (City Dept. of Facility Maintenance) for N. King Street -DFM (City Dept. of Facility Maintenance) for Kohou Street -DTS (City Dept. of Transportation Services) for Kamehameha Hwy. **Additional joint development agreements needed prior to construction:** -Pacific Guardian Center -Howard Hughes Corporation -Sam House Development LLC -GGP Ala Moana LLC ***AGREEMENTS FOR CONSTRUCTION – COMPLETED*** **WOFH:** -D.R. Horton -DLNR (Dept. of Land & Natural Resources) for Kapolei Park & Ride -DOE (Dept. of Education)/DLNR for Waipahu High School -DHHL (Dept. of Hawaiian Home Lands) for MSF **AIRPORT:** -DLNR for Keehi Lagoon
58		**Real Estate/Right-of-Way (ROW)**									
59		*Acquisitions**									**Data is current as of Dec. 18, 2014. Inception to Date Plan numbers are the total number needed for the project and may vary each quarter due to advancement of design.Actual numbers are based on property availability for construction. Data is provided by the Real Estate Acquisition Database (READ).*
60		WOFH Full Acquisitions	0	0	-0-	On track or ahead of plan.	14	14	-0-	On track or ahead of plan.	HART has acquired all full acquisitions for the WOFH section.
61		WOFH Partial Acquisitions	0	3	(3)	Monitoring.	0	3	(3)	Monitoring.	Finalizing agreements for remaining partial acquisitions.
62		*Summary WOFH Acquisitions (Full + Partial)*	*0*	*3*	*(3)*	Monitoring.	*14*	*17*	*(3)*	Monitoring.	
63		KHG Full Acquisitions	1	1	-0-	On track or ahead of plan.	3	3	-0-	On track or ahead of plan.	HART has completed all full acquisitions for the KHG section.
64		KHG Partial Acquisitions	0	0	-0-	Immediate attention needed; Requires recovery/resolution.	2	4	(2)	Immediate attention needed; Requires recovery/resolution.	HART has secured rights of entry for construction for the remaining two partial acquisitions. HART has also tendered offer and is working to complete negotiations.
65		*Summary KHG Acquisitions (Full + Partial)*	*1*	*1*	*-0-*	Immediate attention needed; Requires recovery/resolution.	*5*	*7*	*(2)*	Immediate attention needed; Requires recovery/resolution.	
66		Airport Full Acquisitions	2	1	+1	Monitoring.	3	5	(2)	Monitoring.	One full acquisition is being prepared for eminent domain to address title and trustee issues, and one includes completion of relocation activities.
67		Airport Partial Acquisitions	0	3	(3)	Monitoring.	0	3	(3)	Monitoring.	HART has tendered offers on outstanding partial acquisitions and are in negotiations. HART will work to secure rights of entry, as appropriate, to ensure construction site access.
68		*Summary Airport Acquisitions (Full + Partial)*	*2*	*4*	*(2)*	Monitoring.	*3*	*8*	*(5)*	Monitoring.	

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			Actual	Plan	Variance	Status	Actual	Plan	Variance	Status	
69	Project Progress (continued)	City Center Full Acquisitions	4	13	(9)		8	19	(11)		Appraising properties and preparation of offers is ongoing. HART is also seeking approval from the FTA to utilize possession and use agreements in an effort to promptly obtain construction access to properties. Status for the Current Quarter and Inception to Date have changed from red to orange because the deadline for completion of acquisitions has changed due to design and construction timeline adjustments.
70		City Center Partial Acquisitions	0	66	(66)		0	66	(66)		Appraising properties and preparation of offers is ongoing. HART is also seeking approval from the FTA to utilize possession and use agreements in an effort to promptly obtain construction access to properties. Status for the Current Quarter and Inception to Date have changed from red to orange because the deadline for completion of acquisitions has changed due to design and construction timeline adjustments.
71		*Summary City Center Acquisitions (Full + Partial)*	*4*	*79*	*(75)*		*8*	*85*	*(77)*		*Status for the Current Quarter and Inception to Date have changed from red to orange because the deadline for completion of acquisitions has changed due to design and construction timeline adjustments.*
72		Expenditures for Acquisitions	N/A	N/A	N/A		$70.1	$80.8	($10.7)		$M in expenditures.
73		*Easements**									**Data is current as of Dec. 18, 2014. Inception to Date Plan numbers are the total number needed for the project and may vary each quarter due to advancement of design; Actual numbers are based on property availability for construction. Data is provided by the Real Estate Acquisition Database (READ)*
74		WOFH Easements	0	1	(1)		1	2	(1)		Negotiations are ongoing on the remaining easement in WOFH.
75		KHG Easements	0	0	-0-		0	0	-0-		The numbers previously listed are now included in the Agreements section. Status for the Current Quarter and Inception to Date have changed from orange to green.
76		Airport Easements	0	11	(11)		0	11	(11)		Appraising properties and preparation of offers is ongoing. HART is also seeking approval from the FTA to utilize possession and use agreements in an effort to promptly obtain construction access to properties.
77		City Center Easements	0	25	(25)		0	25	(25)		Appraising properties and preparation of offers is ongoing. HART is also seeking approval from the FTA to utilize possession and use agreements in an effort to promptly obtain construction access to properties. Status for the Current Quarter and Inception to Date have changed from red to orange because the deadline for completion of easements has changed due to design and construction timeline adjustments.
78		*Summary Easements*	*0*	*37*	*(37)*		*1*	*38*	*(37)*		
79		**Safety**									
80		HART OSHA Reportable Injuries	0	0	-0-		0	0	-0-		HART # Occupational Safety and Health Agency (OSHA) Reportable Injuries to date. Reportable incidents, requiring OSHA to be notified within 8 hours, include the death of an employee or hospitalization of three or more employees. For additional information on recordable incidents, please see the HART Monthly Progress Report.
81		Contractor OSHA Reportable Injuries	0	0	-0-		0	0	-0-		Contractor's # Occupational Safety and Health Agency (OSHA) Reportable Injuries to date. Reportable incidents, requiring OSHA to be notified within 8 hours, include the death of an employee or hospitalization of three or more employees. For additional information on recordable incidents, please see the HART Monthly Progress Report.
82		**Quality Assurance (QA)**									
83		Completion of QA Audits	7	3	+4		65	55	+10		# QA Audits of HART, consultants, contractors and suppliers completed vs. planned.
84		Successful Closure of Design NCRs	0	5	(5)		26	31	(5)		# Design Non-Conformance Reports (NCRs) closed vs. issued. For more information on NCRs, please see the HART Monthly Progress Report.
85		Successful Closure of Construction NCRs	23	81	(58)		232	321	(89)		# Construction NCRs closed vs. issued. For more information on NCRs, please see the HART Monthly Progress Report.
86		**Economic Multipliers** [Negative = below plan]									
87		DBE Participation (%)	0.08%	0.13%	(0.05%)		1.16%	13%	(11.84%)		% actual vs. target participation rate of Disadvantaged Business Enterprises (DBE) to date since September 24, 2007. The planned DBE participation rate is an overall project goal.
88		DBE Participation ($)	$1.28	$2.29	($1.01)		$20.44	$229	($208.56)		$M actual vs. target participation of DBE to date since September 24, 2007. The planned DBE participation rate is an overall project goal.
89	Workforce Development	**PERSONNEL**									
90		HART Staffing Level	2	0	+2		130	139	(9)		# Current HART Full-Time Equivalents (FTEs) vs. planned positions in the FY15 Operating Budget. There are currently 130 FTEs onboard. This includes 106 City employees and 24 Project Management Support Consultant (PMSC) employees. The actual number reported in "Current Quarter" reflects all new hires for the quarter. The "Inception to Date" numbers reflect the total number of employees onboard as of Dec. 31, 2014.
91		Direct Project Jobs Created	----	----	----		1,365	----	----		# Direct project jobs created. Actual number reflects input from all contractors and a calculated count for all agencies supporting HART's activities.

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			Actual	Plan	Variance	Status	Actual	Plan	Variance	Status	
92	Partnerships	**Transit-Oriented Development (TOD) Planning***									**TOD planning is being overseen by the city Department of Planning and Permitting and the HCDA*
93	Partnerships	City Department of Planning and Permitting Draft TOD Plans	0	0	N/A	●	10	14	N/A	●	City Department of Planning and Permitting (DPP) is responsible for TOD plans for 19 of the 21 stations. A total of 10 stations have Draft TOD neighborhood plans at this time. DPP started developing Draft TOD plans for the remaining 4 stations: Pearl Harbor Naval Base, Airport, Lagoon Drive and Aloha Stadium. The Ala Moana TOD plan is currently under public review. The remaining Draft TOD plans will be sent to City Council for review and adoption during the third and fourth quarters of 2015. In the interim, the Legislature has adopted Bill 71 Land Use Ordinance (LUO) Amendment Relating to Interim Plan Development Permits for TOD, which will allow for negotiations on TOD projects as per the Draft TOD plans before zoning is in place.
94	Partnerships	Hawai'i Community Development Authority Draft TOD Overlay Plan	0	0	N/A	●	2	2	N/A	●	HCDA developed a Draft TOD Overlay Plan for the areas around Kaka'ako and Civic Center Stations. It will be finalized in the Kaka'ako Environmental Impact Statement.
95	Partnerships	Stations with Final TOD Plans	0	0	N/A	●	5	5	N/A	●	The Waipahu Neighborhood TOD plan (Waipahu and West Loch Stations) and Aiea Pearl City TOD plan (LCC, Pearl Highlands and Pearlridge Stations) have been adopted.
96	Partnerships	*Total Stations with Draft or Final TOD Plans*	*0*	*0*	*N/A*	●	*17*	*21*	*N/A*	●	*TOD plans are being created for 21 stations.*
97	Partnerships	HART TOD Stakeholder Group	*0*	----	*N/A*	●	*2*	----	*N/A*	●	# of meetings held in 2014. Established in 2013, the TOD Stakeholder Group includes representatives from city, state, and private sector entities and organizations.
98	Customer Perspective	**PUBLIC OUTREACH**									
99	Customer Perspective	Build a Social Media Community	171	----	N/A	●	2,680	----	N/A	●	# of unique Facebook followers.
100	Customer Perspective	Proactive Community Outreach: Neighborhood Board Meetings	26	----	N/A	●	942	----	N/A	●	# Neighborhood Board Meetings in which HART has participated to date since 2006.
101	Customer Perspective	Proactive Community Outreach: Presentations/Events	40	----	N/A	●	1,744	----	N/A	●	# Events in which HART has participated to date since 2006.
102	Customer Perspective	**SERVICE DELIVERY**									
103	Customer Perspective	Fare Collection System				○				○	TBD in FY15.
104	Customer Perspective	Bus-Rail Integration Plan				○				○	In April 2014, Bus-Rail Integration Plans were issued. The plans are subject to change and do not reflect operating costs.
105	Customer Perspective	HART Operating Organization Plan				○				○	TBD
106	Customer Perspective	HART Service Policy/Standards				○				○	TBD
107	Customer Perspective	**LIVABILITY**									
108	Customer Perspective	HART Sustainability Policy				○				○	TBD