



TECHNICAL MEMORANDUM #5: IMPLEMENTATION PLAN

Date: February 21, 2023
To: Project Management Team
From: Kittelson & Associates, Inc.
Subject: Implementation Plan (Task 3b)

Project #: 27387

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Introduction

This memorandum discusses the implementation plan for the prioritized projects from *Technical Memorandum #4: Future Funding and Prioritized Projects*, detailing the support and actions needed to turn high-level plans into on-the-ground transit services. Table 1 summarizes the route, information, technology, and facilities recommendations and their associated operating costs and capital investment needs. This memorandum identifies supporting plans, including governance and agency coordination; capital and infrastructure plan; staffing considerations; management, marketing, and information plans; and system performance monitoring. Each section includes a timeframe for when action is needed, the responsible party to lead the effort, and other parties involved in the decision-making and coordination.

Table 1. Service Opportunity Prioritization

Improvement	Short-Term	Mid-Term	Long-Term	Unconstrained
Routes	<ul style="list-style-type: none"> » Implement Hermiston – Boardman Connect and Boardman – Port of Morrow Circular (included in planned baseline costs/vehicles) » Implement Tri-Cities route » Adjust stops for Milton-Freewater route and connecting stop for regional services 	<ul style="list-style-type: none"> » Add one weekday trip for Hermiston HART, La Grande Arrow, and Pilot Rocket » Implement Mission Metro Alternative A 	<ul style="list-style-type: none"> » Increased weekend service on all fixed-routes and demand-response services 	<ul style="list-style-type: none"> » Increased frequency for weekday and weekend service on all fixed-routes and demand-response services
Information, Technology, & Facilities	<ul style="list-style-type: none"> » Real-time vehicle arrival information and passenger counters » Rider tools and information via website and mobile app » Bus stop improvements, in particular for: <ul style="list-style-type: none"> ● Pendleton Walmart ● Hermiston Walmart ● Til Taylor Park ● Hermiston transit center ● Nixyaawi Governance Center/Tribal Health Center 	<ul style="list-style-type: none"> » Centralized Pendleton transit center » Pursue low/no-emission vehicles and infrastructure » Continued bus stop improvements 	<ul style="list-style-type: none"> » Continued bus stop improvements 	
Additional Operating Costs	+\$127,500	+\$255,000 (\$383,000 total)	+\$718,000 (\$1,101,000 total)	+\$2.6M (\$3.7M total)
Total New Buses	+2 buses (Tri-Cities Route)	+2 buses (increased frequency)	0 net new (use same fleet as weekday service)	+10 buses (doubled frequency)

Capital and Infrastructure Plan

Capital and infrastructure—such as vehicles, bus stop shelters, and software—are necessary components of a transit system. Without them, transit cannot exist. The capital and infrastructure plan provides a programmatic approach to support transit operations in Umatilla County with rider amenities and infrastructure that provide for the safe use and enjoyment of the transit system. This section summarizes capital needs required to maintain and expand bus service and flags longer-term needs for further analysis. This section includes the following:

- » **Bus stop Improvements.** Bus stop improvements increase rider comfort while waiting to board. Amenities can include stop signage, bus shelters, benches, timetables, trash cans, bike racks, and more. This section provides guidance on existing stop amenities and guidelines for future stop improvements.
- » **Vehicle Fleet.** A well-maintained and right-sized fleet allows services to operate reliably and accommodate rider demand. This section estimates the vehicle needs and fleet turnover associated with current services and ongoing replacement rates as part of future recommendations.
- » **Maintenance and Storage.** Locating maintenance and storage facilities strategically and planning for adequate space decreases “deadheading” of the fleet and helps to quickly access maintenance services. This section provides guidance on where new transit facilities may be necessary to support the recommended changes.
- » **Technology.** Technologies facilitate a more efficient and convenient user experience and have the potential to better serve riders in the future. This section touches on technological infrastructure.

Bus Stop Improvements

The following summarizes potential bus stop amenities, cost ranges¹, and uses.

- » **Signage.** The cost for new bus stop signage and a pole, installed, can range from \$300 to \$1,000, depending on the material and the installation conditions. Generally, every stop should have signage identifying it.
- » **Benches.** Benches should be considered for stops with at least three boardings per day, although other factors, such as the proximity to senior housing and nearby businesses willing to contribute to the costs, should be factored into the decision as well. Installed benches vary in price from \$500 to \$1,500.
- » **Trash Cans.** The cost for a trash can averages about \$750 in materials, not including installation. Trash cans are often installed alongside shelters, providing cost savings. Installation should also consider stop maintenance and the need to regularly empty cans.
- » **Bike Racks.** Bike racks are typically most beneficial at regional transfer locations. Bike racks typically cost \$150 to \$300. Bicycle accommodation should also consider the demand to load bicycles onto transit vehicles for first-/last-mile connections.

¹Cost estimates are sourced from *Transit in Small Cities: A Primer for Planning, Siting, and Designing Transit Facilities in Oregon* <https://digital.osl.state.or.us/islandora/object/osl:10551>

- » **Shelters.** Passenger shelters add to the comfort of using transit and are generally popular with riders. An "off the shelf" passenger shelter costs about \$6,000 plus installation. In addition to initial capital costs, passenger shelters will incur maintenance costs for cleaning, repair, and replacement. The cost estimate does not include the concrete pad, if needed. Given their higher cost, shelters may be less feasible to implement, and may be reserved for stops with twenty or more boardings per day.
- » **Transit Centers and Major Transit Stops.** Transit centers provide a transfer point for bus routes, while major transit stops are typically provided at major activity centers. In addition to providing greater passenger amenities that improve rider comfort, transit centers and major transit stops provide visibility for the transit service, reminding residents and visitors of the availability of the service within their community. They can include higher-level amenities such as restrooms and indoor waiting areas, large covered waiting zones, and more.

Figure 1 summarizes this information and includes other considerations. The ODOT *Highway Design Manual* provides additional information on facility design for bus stops, in particular related to ADA standards. The minimum required dimension for a boarding pad is 8' x 5' of concrete per door. Additional space and boarding pads where the wheelchair lift takes place are preferred. Bus shelters need larger landing pads to ensure ADA clearance around the shelter and stop, resulting in a landing pad at 2.5' x 4' minimum for the shelter. Additional space may be needed depending on shelter type and subsequent clearance needs. Additional space may also be needed for signs, benches, shelters, and other amenities depending on the clearance from a roadway, distance to crosswalks, and access to traffic signals and other infrastructure.

Figure 1.

DESIGNING BUS STOPS



Safe and comfortable facilities can improve the experience of riding transit and increase ridership by improving stop visibility, providing protection from poor weather, and improving access to transit. The following table shows typical stop amenities, describes their typical costs, and provides the activity levels that typically prompt inclusion of them. Scenarios that may trigger higher levels of amenities include:

- **Land use** – assisted living homes, medical facilities, veteran's resources, and other land uses may increase the need for benches or shelters at stops; low-density areas may see higher bike rack/locker demands due to the longer distance to travel to stops
- **Customer use** – amenities such as trash cans or information cases may be triggered by trash accumulating at stops, bus drivers receiving information requests from riders, or riders directly requesting these improvements
- **Coordination opportunities** – if a local jurisdiction is looking to provide lighting, repaving, etc. on a transit route, installing higher-level bus amenities may be advantageous to reduce cost even if a stop hasn't reached higher activity levels yet

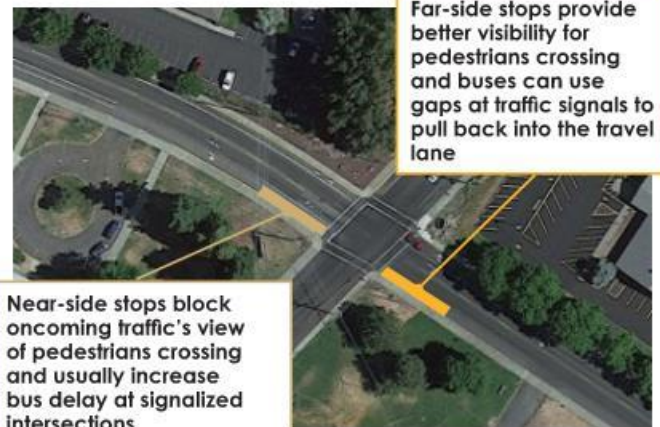
AMENITY	TYPICAL COST	STOP LEVEL
Signage & route information	\$300 to \$1,000	All stops
Lighting	\$5,000 to \$10,000	All stops
Bench	\$500 to \$1,500	3+ boardings per day
Shelter (small)	\$6,000	20+ boardings per day
Trash can	\$1,000 to \$1,500	Major bus stops/transit centers, as-needed
Bike racks	\$150 to \$300 (two-bike rack)	Major bus stops/transit centers, near bike routes
Information cases (systemwide route information; advertising)	\$1,000 to \$10,000	Major bus stops/transit centers
Bike lockers	\$2,000 to \$3,000 per locker	Major bus stops/transit centers, near bike routes
Shelter/covered area (large)	Varies	Major bus stops/transit centers

Placement and Pullouts:

Transit stops should be coordinated with roadway agencies to ensure stops are ADA-accessible and connect to low-stress walking and biking facilities and crossings. This coordination should include maintenance considerations, such as emptying trash cans and snowplow operations.

On major roadways with speeds of 35 mph or more, such as state highways, transit agencies may consider bus stops that allow buses to stop out of the traffic lane, to avoid rear-end collisions and discourage unsafe passing of the bus by motorists.

Near-Side vs. Far-Side?



Far-side stops provide better visibility for pedestrians crossing and buses can use gaps at traffic signals to pull back into the travel lane

Near-side stops block oncoming traffic's view of pedestrians crossing and usually increase bus delay at signalized intersections

Table 2 summarizes existing, recommended short-term (within the first 3 years), long-term (beyond 3 years), and not recommended (N/A) improvements at identified stops per the Hermiston – Boardman Connector/Boardman – Port of Morrow Circular effort. The recommendations sought to establish at least one stop with higher levels of amenities in each community, often at an existing public facility or major activity center. As services and ridership patterns stabilize, the service providers and local jurisdictions can further refine and prioritize the long-term improvements. Shelters are considered existing if they are immediately adjacent to the stop; restrooms are considered existing if they are publicly available, or in the case of employment stops, available to the employees. Some amenities, such as restrooms at the Recycling Depot and 6th Street/B Street stops, are intended to be one restroom servicing both stops, which are across the street from each other. Similar prioritization of bus stops and priorities could be developed for each of the transit providers in Umatilla County.

Table 2. Amenities at Stops

Stop	Benches	Shelters	Trash Cans	Bike Racks	Restrooms
SW 3rd Street/W Orchard Ave	Ex	Ex	Ex	Short-Term	Short-Term
Walmart	Short-Term	Short-Term	Ex	Short-Term	Long-Term
Northwest Farm Supply	Long-Term	Long-Term	Ex	Long-Term	N/A
KIE Supply Corporation	Long-Term	Long-Term	Long-Term	Long-Term	N/A
Lamb Weston (Westland Road)	Short-Term	Long-Term	Long-Term	Long-Term	N/A
McNary Market	Short-Term	Ex	Ex	Short-Term	Long-Term
Post Office	Long-Term	Long-Term	Long-Term	Long-Term	N/A
Recycling Depot	Short-Term	Short-Term	Ex	Short-Term	Long-Term
6th Street/B Street	Short-Term	Short-Term	Ex	Short-Term	Long-Term
City Hall Village Square	Ex	Long-Term	Long-Term	Long-Term	N/A
6th Street/Yrexa Avenue	Short-Term	Long-Term	Long-Term	Long-Term	N/A
Highway 730 and First Street	Short-Term	Short-Term	Short-Term	Short-Term	Long-Term
Employment stops	Short-Term	Long-Term	Long-Term	Long-Term	Ex
SAGE Center	Ex	Ex	Ex	Ex	Ex
Boardman Ave/Main St	Short-Term	Short-Term	Ex	Short-Term	N/A
Columbia Ave/2 nd St	Short-Term	Ex	Short-Term	Short-Term	N/A
Boardman Post Office	Short-Term	Short-Term	Ex	Short-Term	Long-Term
Main St/Front St	Short-Term	Short-Term	Ex	Short-Term	N/A
Select Market/DHS	Short-Term	Short-Term	Ex	Short-Term	Long-Term
Faler Rd/Mt. Hood Ave	Long-Term	Long-Term	Long-Term	Long-Term	N/A
Mt. Hood Ave/Wilson Ln	Short-Term	Short-Term	Short-Term	Short-Term	N/A
Wilson Rd/River Ridge Dr	Long-Term	Long-Term	Long-Term	Long-Term	N/A
Wilson Rd/Anthony Rd	Short-Term	Long-Term	Long-Term	Long-Term	N/A
Tatone St/Wilson Rd	Short-Term	Long-Term	Long-Term	Long-Term	N/A
Tatone St/Willow Fork Dr	Long-Term	Long-Term	Long-Term	Long-Term	N/A
C&D Drive-In	Ex	Ex	Ex	Short-Term	N/A
Boardman Ave/2 nd Ave	Short-Term	Long-Term	Long-Term	Long-Term	N/A

Ex: Existing amenity

Short-Term: Within the next 3 years

Long-Term: Beyond 3 years, preferably within 20 years, dependent on demand as transit service stabilizes.

N/A: Not recommended for future improvement.

These stops represent general locations and can shift based on service needs and discussions with property and business owners. For example, the 3rd/Orchard stop represents a major activity center in Hermiston, and ongoing conversations with City of Hermiston staff may identify a

different location for a future transit center in Hermiston. For example, a future option may include Hermiston City Hall, which is planned for reconstruction and has the potential to include elements such as bus bays and sheltered waiting areas. A transit center could also be developed in the open areas near Port Drive and SE 9th Street, providing a connection to Blue Mountain Community College, DHS, and Umatilla County Circuit Court – Hermiston Branch, with a smaller stop still providing service to central Hermiston. Other vacant land, such as near Good Shepherd Health Care System and Walmart, could also be developed as a transit center. The Umatilla Port of Entry has also been discussed as a potential future transit center and/or vehicle storage and maintenance location, if the Port of Entry is relocated in the future. Morrow County is actively seeking a location for a new maintenance facility, which could potentially serve as a transit center as well. This site is to be determined in partnership with the City of Boardman and businesses.

Vehicle Fleet

The City of Pendleton's 10-vehicle fleet has several vehicles exceeding their expected useful life (EUL) and in need of replacement. Additionally, Kayak Public Transit has a fleet of 8 vehicles, all of which are in regular operation. Three vehicles are nearing or above their 200,000-mile EUL, with their estimated replacement year being 2023. Two new buses are needed to implement the Tri-Cities route in the short term (one operating vehicle, one additional spare vehicle) and one new vehicle is needed in the mid-term to increase the daily frequency on several routes.

Annual mileage was examined to determine a rough estimate of City of Pendleton's and Kayak Public Transit's annual fleet replacement needs, based on estimated service miles per year. Note these rates do not include deadhead mileage. This information is displayed in Table 3. This table does not include vehicles for the Hermiston HART or private services.

Table 3. Vehicle Fleet Replacement Rates

	Existing	Planned	Short-Term	Mid-Term	Long-Term	Unconstrained
Annual Service Miles	741,949	827,829	865,523	912,404	992,801	1,484,277
Fleet Replacement Rate (vehicles per year, based on 200,000 miles per vehicle)	3.71	4.14	4.33	4.56	4.96	7.42

Purchasing vehicles in larger batches has the advantage of having multiple vehicles that are identical in terms of parts and maintenance needs. Even very similar vehicles purchased in different years may have differences that can impact maintenance costs. Thus, while Kayak Public Transit will need to replace 3–4 vehicles per year on average, they could consider purchasing 6–7 vehicles every other year instead.

Regarding the types of vehicles, Umatilla County providers will need to balance the efficiency advantages of fleet standardization with the benefits of matching vehicle size and other vehicle attributes with specific needs. Benefits of fleet standardization are greater flexibility in vehicle assignments and a reduced need for spare vehicles since sub-fleets each require their own spare vehicles, and smaller fleets typically require a greater spare ratio. Additionally, fleet standardization reduces maintenance costs by requiring less parts inventory and letting

mechanics focus on a reduced number of vehicle models. The benefit of having several diverse vehicle types is that a vehicle can be more closely tailored to a specific service need or operating environment.

Further, Umatilla County and its providers should monitor the potential for using alternatively fueled vehicles as these vehicles' ranges increase. Local routes such as the Pendleton Let'er Bus and Hermiston HART may be capable of being operated with electric or other alternatively fueled vehicles sooner. Charging and fueling infrastructure will need to be in place prior to implementing a new fleet.

Maintenance and Storage

Vehicle storage and maintenance facilities near the area(s) where vehicles are used can help reduce deadhead miles and hours, which occur when a vehicle travels without passengers between its storage location and the start or end of its route. Reducing deadheading reduces costs related to vehicle wear and tear, fuel, and driver time. Locating maintenance facilities near transit service areas also helps reduce response time if a vehicle breaks down.

Constructing new storage and maintenance facilities or partnering with local jurisdictions to share existing space can also help reduce deadheading. Alongside the transition to becoming a transportation district, providers could pursue a centralized transit center in Pendleton, potentially using and/or expanding the planned storage facility in northwest Pendleton. Additional local storage facilities in other areas in the County could be beneficial for operations, including one in northwest Umatilla County to support increased service in that area, or in other areas such as Milton-Freewater or in neighboring counties such as La Grande, to support early morning trips into Umatilla County.

Technology

This section explains four key technologies that Umatilla County should consider pursuing to improve service efficiency, operations, and user experience.

iTransitNW

iTransitNW is a real-time passenger information system that is focused on southeast Washington, northeast Oregon, and central Idaho. Previously only managed by Valley Transit in Walla Walla, WA, each agency now requires their own contract to use the technology. Depending on the transit service a passenger uses, arrival times and service alerts are available through mobile applications (Valley Transit App, Grant County App, Token Transit App, Kayak Public Transit App, City of Pendleton Transit App). The web-based version has a live map, a trip planner, and a search engine for bus time arrivals. Umatilla County providers can continue to enhance the tool's use and distribute information to riders.

Microtransit and Micromobility

Microtransit operates similar to transportation network companies (TNCs) such as Uber and Lyft in that riders typically request service using a smartphone app. Microtransit can provide door-to-door or curb-to curb trips within a specified service area. Rides are usually shared with others traveling in the same general direction. Microtransit works best for:

- » Serving low-density areas.
- » Completing the first or last mile of transit trips.
- » Riders who prefer not to walk due to uncomfortable weather or limited mobility.

Bikeshare and electric scooter share programs are also microtransit options that can be implemented using third-party vendors such as Bird, Lime, and Spin. These options are popular with riders seeking active transportation connections to the transit system. To be successful, these programs require active management and review to ensure that vehicles do not become a nuisance by blocking sidewalks and bus stops. GPS technology and geofencing can be used to ensure that parking these vehicles in unwanted areas is avoided.

Umatilla County and its providers should monitor areas that meet the above descriptions for potential micromobility implementation. One such area, though not in Umatilla County, would be the Port of Morrow. The Hermiston – Boardman Connector/Boardman – Port of Morrow Circular identified the need for first-/last-mile options connecting employees from the curbside (which the Connector and Circular would serve) to the front door of the buildings, which are often separated by large parking lots. Providing microtransit here could serve as a pilot for Umatilla County.

Table 4. Capital and Infrastructure Plan Implementation Actions

Action	Responsible Party/Parties	Supporting Parties	Timeframe
Monitor bus stop activity to determine appropriate amenities	Transit providers	Umatilla County	Throughout
Implement bus stop improvements	Transit providers, roadway owners	Umatilla County	Throughout
Improve walking and biking access to stops	Roadway owners	Umatilla County	Throughout
Maintain vehicle fleet	Transit providers	Umatilla County	Throughout
Pursue alternative fuel infrastructure and vehicles	Transit providers, roadway owners, Umatilla County	—	Throughout
Expand maintenance and storage facilities as needed	Transit providers	Umatilla County, Local jurisdictions	Throughout
Pursue micromobility for first-/last-mile access	Transit providers, large employers, Umatilla County	Local jurisdictions	Short-term

Staffing Considerations

Additional transit service calls for additional staff. Table 5 shows the service hours estimated for existing and recommended services (including fixed-route and dial-a-ride services) and uses these to increased driver staffing needs. Note that these estimates do not include factors such as driver prep time before operating the vehicle, deadhead time, or breaks. Assuming 40 hours per week, the full-time equivalent (FTE) number of drivers needed to operate service is below.

Table 5. Bus Driver - Service Hours

	Existing	Planned	Short-Term	Mid-Term	Long-Term	Unconstrained
Annual Service Hours	31,630	35,200	36,475	39,025	47,000	75,445
Drive FTE (2,080 annual hours per driver)	15.2	16.9	17.5	18.8	22.6	36.3
Relative Percent Change Compared to Existing	—	+11%	+15%	+23%	+49%	+139%

In addition to additional driver staff, additional supervisors, maintenance (if performed in-house), administration, and other staff would be needed over time as service increases. Further, if low- or no-emission vehicles are pursued, mechanics would need to be trained to work on different engine types and with different equipment (e.g., charging infrastructure). Additional considerations for staffing includes:

- » Collaborating with workplace training organizations to attract and train new staff.
- » Conducting staff feedback sessions to understand staff perspectives, including challenging components of operating a route or serving a stop, feedback passed on from riders, and other potential issues. Collecting this feedback can help to boost operations and improve the work environment for staff.
- » Assessing staff compensation and benefit packages to promote livable wages.
- » Monitoring staffing needs based on changes to governance and agency coordination, as discussed previously.

Table 6. Staffing Considerations Implementation Actions

Action	Responsible Party/Parties	Supporting Parties	Timeframe
Hire staff to implement service recommendations	Transit Providers	Umatilla County	Throughout
Collaborate with workplace training organizations	Transit Providers, training organizations	Umatilla County	Throughout
Conduct staff feedback sessions	Transit Providers	Umatilla County	Throughout
Assess compensation and benefits	Transit Providers	Umatilla County	Throughout
Monitor staffing needs related to governance	Transit Providers, Umatilla County	—	Throughout

Management, Marketing, and Information Plan

A coordinated, targeted, and effective public information and marketing campaign would help publicize and encourage people to use transit. This section provides management strategy and marketing and information strategy recommendations for Umatilla County.

Management Strategies

Management strategies are conducted behind-the-scenes for effective staff operations and improved rider experience.

- » **Partner with employers.** Work with employers to identify employee shift times, for use in developing schedules and route connections that would meet those employees' travel needs. Market existing services through employers to encourage information-sharing to employees and feedback from transit users. Explore vanpool opportunities for employers who may be difficult to serve on general public services (e.g., late shift employees, remote employment locations, seasonal work).
- » **Collaborate with community-based organizations (CBOs) and health and human services organizations.** Collaborate with organizations such as New Horizons, CAPECO, Clearview Mediation and Disability Resource, and Good Shepherd Health Care System, to identify changing travel needs and develop solutions for clients.
- » **Promote coordination across government and tribal agencies, including transit providers, roadway owners, state agencies, local and regional partners, and other organizations.** Coordination between local partners will lead to a comprehensive and efficient system in which users can travel seamlessly inter- and intra-regionally. It also provides an opportunity for agencies to share information about local transportation options, training opportunities, and other information.
- » **Create measurable outcomes for services to promote effective monitoring and increase customer satisfaction.** The *System Performance Monitoring* section of this memo identifies ways to monitor performance over time to better evaluate service outcomes. Engage community members to improve customer satisfaction, retain existing riders, and attract new riders.

Marketing and Information Strategy

The following describes actions to improve customer service and information that can be implemented in the short-term and that should be maintained on a long-term basis:

- » **Provide maps and information in user-friendly brochures.** Printed brochures and pamphlets can be designed and distributed to various target audiences to promote dial-a-ride and fixed-route services. The main element of this kind of promotion is to vary the communication style for distinct target groups while encouraging all to use the same transit service. For example, people with limited English proficiency often rely on transit to travel, necessitating bilingual brochures and pamphlets. Parents need information on riding with children and stowing items such as strollers. A printed brochure or pamphlet should include one or more route maps showing all routes with deviation zones, bus stop locations, landmarks, and key destinations clearly depicted. How-to-ride information should also be included, including but not limited to fares, fare media, and how to request dial-a-ride. Contact information that includes a website address, telephone number, and reference to available trip planning apps (such as Google maps, the Transit trip planner, or the iTransitNW apps) should be provided. Making this information clear will be helpful for new, youth, and senior transit riders. This pamphlet can also include support for multi-modal trip planning and access to major destinations. Due to the amount of providers and services in Umatilla County, multiple maps or brochures may be needed to capture the range of options.

- » **Provide real-time information and trip-planning technologies.** Real-time bus arrival and route information helps improve the ridership experience by reducing passenger wait times at the stop (passengers know when they should leave for the stop) and provides confidence that a bus has not been missed. With longer headways creating long waits if a bus is missed, real-time information helps reassure riders that their bus is on the way. Providers in Umatilla County either already have or are pursuing automatic vehicle location (AVL) systems needed to provide real-time data. Information for all transit routes could be provided via the iTransitNW website, smartphones, “push” technologies such as text messages, and telephone support.
- » **Advertise.** Advertising via different media can help attract a range of riders. Display advertising of the dial-a-ride and fixed-route services in free weekday shopping papers and other local papers distributed in the community is a potential tool to introduce and promote service that can generate ridership. Other ways of promoting the service include radio spots, social media, and email blasts.
- » **Educate.** Employ a Travel Training Program Manager that assists Umatilla County and its providers in teaching local, rural, and underserved populations how to use available public transit services. Develop programs to teach both agency staff and riders how to use public transit (travel training and travel ambassadors). These programs need bicultural messaging and need to be carefully designed to support veterans, tribes, older adults and elders, youth, and people with developmental disabilities. The programs could engage people from these groups who are already using the bus system as travel trainers. Umatilla County could monitor the Rural Transportation Equity Grant process should the grants continue; these grants were offered in 2022 to conduct outreach in rural communities for transit, walking, and biking modes.
- » **Expand branding for Umatilla County transit options.** Branding is the foundation of the marketing strategy and provides an identity and image to potential customers. It helps create immediate recognition of all aspects of the service. Key elements of branding include the name, logo, vehicle colors and graphics, and bus stop signage and facilities. It is important to use colors and graphics consistently for maximum effect. A distinctive base color used consistently on transit vehicles and facilities becomes the “color of the bus” in the community. Vehicle graphics, bus stop signage, shelters, and benches enhance transit visibility throughout the community; their style, color, and quality should be consistent. Bus stops and shelters are a convenient place to provide additional information about routes, schedules, and deviation zones. For Umatilla County, continuing to provide clear branding for the different service providers helps to reduce rider confusion and distinguish which stops are served by which provider.

Table 7. Management, Marketing and Information Plan Implementation Actions

Action	Responsible Party/Parties	Supporting Parties	Timeframe
Partner with employers	Umatilla County, Transit Providers, Employers	ODOT, education centers	Throughout
Collaborate with CBOs and health and human service organizations	Umatilla County, CTUIR, Transit Providers, Health and Human Services	—	Throughout
Promote coordination across government and tribal agencies	Umatilla County, CTUIR, Transit Providers, Roadway Owners, ODOT/WSDOT	—	Throughout
Create measurable outcomes	See <i>System Performance Monitoring Section</i>		
Provide maps and information in user-friendly brochures	Transit Providers	Umatilla County, Local jurisdictions	Throughout
Provide real-time information and trip planning technologies	Transit Providers	Umatilla County, ODOT	Throughout
Advertise	Umatilla County, Transit Providers	Local jurisdictions	Throughout
Educate	Umatilla County, Transit Providers	Local jurisdictions	Throughout
Expand branding	Umatilla County, Transit Providers	Local jurisdictions	Throughout

Governance

Different governance scenarios present a range of coordination opportunities, staff commitments, costs (both increased and decreased depending on alternative), and benefits. The level of governance varies depending on the following concepts: communication, coordination, collaboration, and consolidation.

- » **Communication.** Partners act independently while exchanging information.
- » **Coordination.** Partners act jointly on an informal basis (by non-binding action).
- » **Collaboration.** Partners act jointly on a formal basis (by binding action).
- » **Consolidation.** Partners integrate a more regionalized decision-making framework.

As the interaction between partners becomes less individually focused, the overall decision-making process becomes more structured, where resources must be devoted to. Additionally, there are principal considerations that shape different governing scenarios. These considerations include the following:

- » **Elected Oversight and Policymaking:** transparent communication on any public issue and consistent contracting standards and requirements,
- » **Operational Efficiency:** factors, including day-to-day routes, fleet management, staff training, etc., that can improve regional operations,
- » **Funding:** the ability to preserve access to existing revenue streams and outline opportunities for additional funding,

- » **Service Delivery:** the ability to provide multiple service models, such as continued operations by existing service providers, and
- » **Fixed-Route Focus:** an initial focus on fixed-route service with the potential to expand service models.

Combining the idea of partnering concepts and principal considerations results in the following governing scenarios, all of which are briefly described below. Further detail on these alternatives is available in Appendix A.

Scenario 0: Status Quo

This scenario continues the current agreements unchanged. Regional transit roles and responsibilities are difficult to sort through and depend on each agency's priorities and the local government's ability to fund contracted service. There are no additional implementation considerations, as this scenario is already implemented.

Scenario 1: Enhanced Status Quo

This scenario includes near-term action that leads to improved organizational effectiveness in the long term. It provides a more structured decision-making process, as it includes annual check-in points for regional elected officials and open forums for regular staff interaction. It perpetuates existing agreements and still leaves room for an improved partnering structure and planning process. Implementation considerations include an informal charter or one multi-agency Memorandum of Understanding (MOU).

Scenario 2: Regional Transit Advisory Board (TAB)

A regional TAB consists of elected representatives appointed from each partner agency. It calls for an interagency agreement, where sustainable funding, transit plans and priorities, etc., are discussed. The regional TAB can function as a long-term decision-making structure, improving oversight and providing a central forum for prioritization of regional transit initiatives and projects. There are limited opportunities for increased funding but is straightforward for implementation.

Scenario 3A (Morrow/Umatilla) and 3B (Morrow/Umatilla/Union): Multi-County Service Districts

Joint service districts provide regional decision-making benefits, as it could streamline transit operations between the counties. It also creates opportunities for local revenue generation. It is challenging to implement for the following reasons: public vote in each county is required; an extensive public information campaign would likely be needed; and a detailed financial feasibility analysis should be done.

Scenario 3C: Single-County Districts

Single-county service districts could offer additional revenue opportunities and enhance elected oversight of transit services. It is less challenging to implement (than joint service districts) but still requires public vote, an extensive public information campaign, and a detailed financial feasibility analysis.

Scenario 4: Regional Cooperative or Transportation Management Organization (TMO)

A regional co-op or TMO establishes its own board and staff and could be set up to provide any or all transit services needed by its owners. Either option has a democratic approach to ownership and the potential for improved public transparency on transit issues. Additionally, it could centralize transit functions for the region to improve administrative and operational efficiency. In this scenario, owners share the same price for its services and requires decision-making input from all owners. It is implemented through a formal agreement among governing

agencies. An interagency transfer of existing assets from existing transit agencies to the co-op is possible but requires special authorization, especially if the assets were originally purchased with state or federal grant funds. A detailed feasibility analysis should also be done if this scenario would be implemented.

Key Findings

The evaluation provided the following insights on governance scenarios:

- » Scenarios which centralize regional operations (Scenario 4) under one organization have the greatest potential to improve clarity of system information for customers and the general public.
- » All organizational scenarios provide at least some level of improvement in overall government accountability, policymaking, and oversight; however, scenarios that establish a formal forum for interaction between elected officials (Scenarios 2 and 4) would provide the largest benefits in this area.
- » The level of service possible in different geographic areas of the region is highly dependent on each county's financial position and how much each existing transit agency can afford to purchase for their residents.
- » Scenarios that centralize operations under a single agency (Scenario 4) would provide the greatest economy of scale for the region in nearly all aspects of transit program delivery: planning, purchasing, operating, contracting, maintenance, etc.
- » Scenarios that create new agencies, such as new single-county service districts (Scenario 3C) or a regional co-op or TMO (Scenario 4) would remove the administrative burden of transit programs from existing partner agencies. Of these, the centralized concepts for Scenario 4 could give the partners access to potentially greater staff-level expertise than is currently possible since staff at county agencies must often wear multiple hats.
- » Scenarios that create new transportation districts (such as Scenario 3) have the potential to improve the region's transit funding outlook with new local revenue streams.
- » Single-county transportation districts in Umatilla, Morrow, and Union counties (Scenario 3C) would be challenging, but feasible to implement, and many examples of single-county transit districts exist in Oregon. However, scenarios that involve joint districting of two or more counties under existing statutes, such as a joint Morrow County/Umatilla County transportation district (Scenario 3A), or a joint Morrow County/Umatilla County/Union County transportation district (Scenario 3B), would require successful public elections across several counties, and are not likely feasible to implement.

Table 8. Governance and Agency Coordination Implementation Actions

Action	Responsible Party	Supporting Parties	Timeframe
Scenario 0: Status Quo	Umatilla County, Transit providers	—	Throughout
Scenario 1: Enhanced Status Quo	Umatilla County, Transit providers	Elected officials, Key transit stakeholders	Throughout
Scenario 2: TAB Implementation	TAB advisory group	Umatilla County, Transit providers	Throughout
Scenario 3A: Joint Morrow/Umatilla Service District	Morrow County, Umatilla County	Transit providers	Throughout
Scenario 3B: Joint Morrow/Umatilla/Union Service District	Morrow County, Umatilla County, Union County	Transit providers	Throughout
Scenario 3C: Single-County Districts	Morrow County, Umatilla County, Union County	Transit providers	Throughout
Scenario 4: Regional Cooperative or Transportation Management Organization	Co-op or TMO	Transit providers	Throughout

System Performance Monitoring

The following section provides a program to track transit service performance and the success of the plan's recommendations. The program is data-driven and is founded on performance measures that can be tracked on a regular basis and compared to set benchmarks. In most cases, these performance measures are already tracked as part of Federal Transit Administration (FTA) reporting requirements. This program enables a dynamic system where service adjustments can be implemented and justified following performance evaluations.

Performance measures are divided into monitoring on an annual and a less-frequent (e.g., biennial) basis. Most of the recommended performance measures should be reviewed each year; the performance measures identified for less-frequent review are less likely to fluctuate meaningfully on an annual basis. As these performance measures are applied in the future, Umatilla County and its providers may adjust how often specific performance measures are examined. Benchmarks also consider existing and future data availability.

Annual Review of Performance Measures

The following performance measures are recommended to be evaluated at least annually to understand how the new services are being used. All but one of these measures are typically already monitored for National Transit Database (NTD) reporting purposes.

- » **Capital costs:** Examine annual capital costs by service operator (Kayak Public Transit Pendleton Let'er Bus, etc.) and improvements by facility owners (Umatilla County, Morrow County, local cities, employers, other property owners). This information is useful for budgeting for vehicle replacements and additional transit-supportive infrastructure such as shelters, based on actual agency cost experience.

- » **Operating costs:** Tracks annual operating costs for the services. This information is useful for evaluating cost trends for future budgeting purposes, and for calculating other performance measures, such as cost per hour, that can be compared with peer agencies to understand relative industry trends.
- » **Annual rides:** Tracks total number of rides per year. This information is useful for evaluating ridership trends, and for calculating other performance measures, such as rides per hour or cost per ride, that can be compared with peer agencies. Transit providers typically also track ridership more frequently (e.g., by month, by day of week) to help identify ridership patterns and trends.
- » **Revenue service hours:** Tracks total number of hours of revenue service provided. This measure is used to calculate rides and cost per hour.
- » **Rides per hour:** Tracks average annual rides per hour (productivity). Staff resources permitting, tracking annual productivity by scheduled trip is useful for identifying and supporting the need for schedule changes (e.g., addressing consistently over- or under-utilized trips), for identifying the need to purchase higher-capacity vehicles, and for targeting marketing efforts to increase ridership, among other uses.
- » **Cost per hour:** Tracks average annual operating cost per revenue hour. Cost per hour is a useful measure to compare to peer agencies, to check whether one's costs and cost trends are in line with, greater than, or less than one's peers.
- » **Number of dial-a-ride/deviation request denials (demand-response and services that deviate):** Tracks the total number of trip or deviation requests denied for services to help identify the need for more vehicles in operation, schedule and route modifications to maintain service reliability, and/or changes in service type (e.g., to fixed route). In addition, although more labor-intensive, tracking where and how frequently deviation requests are made can be useful for making route adjustments to serve high-demand trip origins and destinations.

Less-Frequent Review of Performance Measures

The following performance measures are either (1) less likely to change in a significant way on an annual basis and do not need to be tracked each year, or (2) are time-intensive to evaluate on an annual basis.

- » **System ease of use:** Tracks improvements made to travel between communities or transit providers, such as technology improvements (trip-planning, real-time tracking apps) and timed transfers between different transit providers.
- » **Bicycle and pedestrian access:** Tracks the percentage of stops having a sidewalk/path, bicycle lane/path, and/or crossings connecting to the stop.

Table 9. System Performance Monitoring Implementation Actions

Action	Responsible Party/Parties	Supporting Parties	Timeframe
Track costs, hours, rides, dial-a-ride/deviation requests, system ease of use	Umatilla County, Transit Providers	Roadway Owners	Throughout
Track bicycle and pedestrian access	Umatilla County, Roadway Owners	Transit Providers	Throughout



Next Steps

These draft implementation plan will be reviewed with the PMT, stakeholders involved with service implementation, and AC, revised, and refined for inclusion in the *Transportation Development Plan*.

Appendices

- A. Governance and Agency Coordination

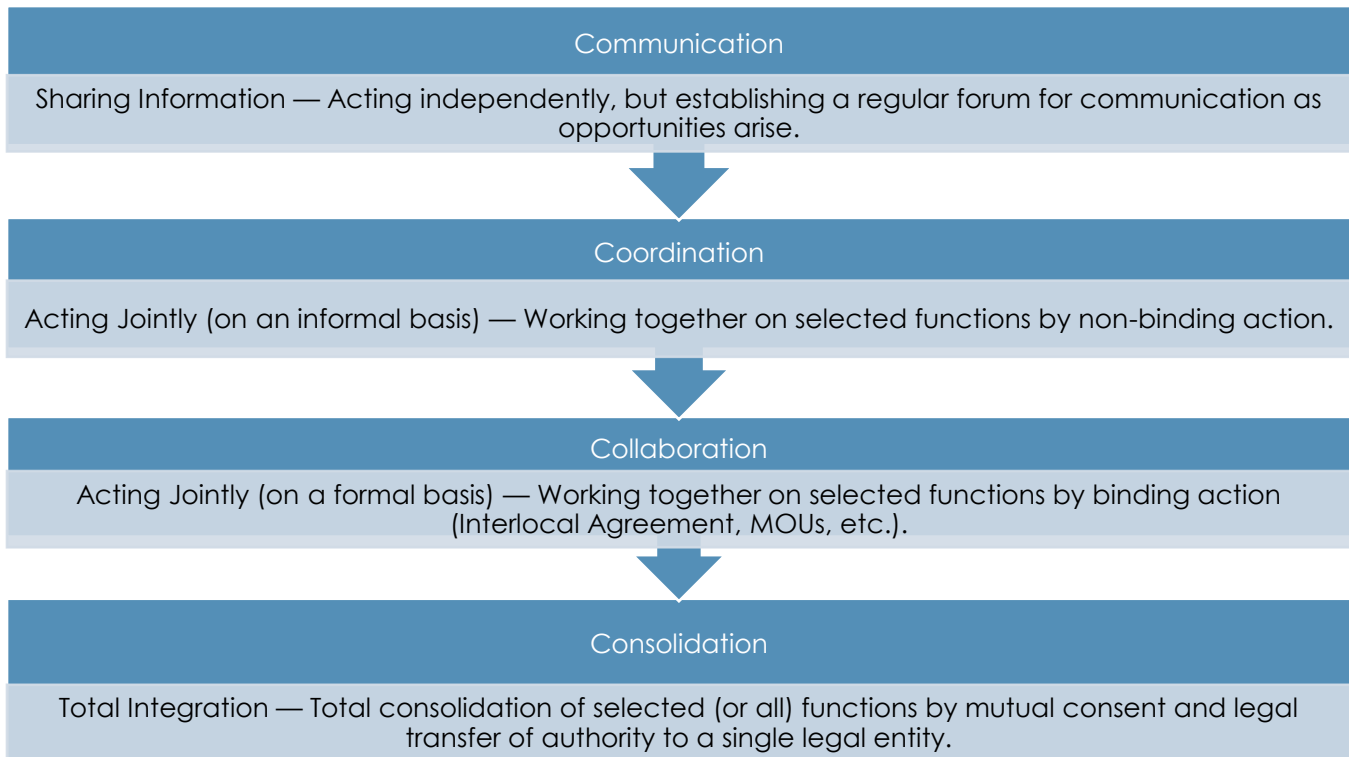
Appendix A. Governance and Agency Coordination

This memo describes the spectrum of governance and partnering concepts that could support the provision of transit service in and beyond Umatilla County (the “region”). It describes principal considerations for selecting a governance structure and presents several scenarios for discussion.

Spectrum of Governance/Partnering Concepts

Figure 1 describes a spectrum of concepts for governance and partnering options. Concepts can range from an informal communication framework with all decisions made at the individual partner level, to integrating some or all functions through a more regionalized decision-making framework. Moving from top to bottom down the spectrum, the level of required decision-making interaction between partners increases. Often, but not always, the resources that must be devoted to the decision-making process increases as well.

Figure 1. Spectrum of Governance/Partnering Concepts



Adapted and modified from North Carolina Department of Transportation 2012 Statewide Regionalization Study Final Report, KFH Group, Inc.

Principal Considerations

Elected Oversight and Policymaking

The oversight of elected officials in programs and projects that use public funds and affect residents' lives is a fundamental aspect of our country's democracy. However, elected officials are often asked to stay abreast of numerous diverse topics and issues. A single county commission agenda, for example, may include such topics as land development, emergency management, noxious weeds, public health and safety, road conditions, parks and recreation, and many others.

Written documents and reports on regional transit matters can be made available, but there is only so much written material we can expect elected officials to absorb given the numerous competing demands on their time. Interactive meeting time is important for transparent communication with elected officials on any public issue. Given the complexity of regional transit needs and issues, a designated forum for regional elected officials to stay updated on transit activities and develop a mutual understanding of regional transit priorities may be of interest to transit providers.

A related oversight consideration is the consistency of transit policies across the region. Customers making connections between service providers may encounter different policies for rider behavior, pets and service animals, bicycle transport, holiday service, etc. Differing contracting standards and purchasing requirements may inadvertently favor some transit providers over others in the marketplace. Differing wage scales and employee benefit programs can make it challenging for agencies with less favorable compensation packages to compete for qualified employees. Ideally a new regional decision-making framework could help to address and streamline these types of policy inconsistencies.

Operational Efficiency

Alternative governance structures for a regional transit program could improve regional efficiency on many fronts. Examples could include:

- » Day-to-day route, stop, and schedule decisions
- » General route and service planning
- » Long-range transit development planning
- » Data collection and performance reporting
- » Fleet management
- » Customer service standards
- » Safety and security
- » Emergency procedures
- » Staff training
- » Use of volunteers
- » Advertising and marketing
- » Equipment sharing

A new decision-making framework could establish regional management systems that could be implemented either in addition to, or as replacements for, individual agency programs. There is a wide array of governance options that could be considered for operational decision-making, ranging from the current practice of inter-agency collaboration on one or two operational topics, to implementing a more centralized form of governance that could handle operational decision-making across a variety of topics.

Governance vs. Funding

This memo summarizes current revenue streams and outlines opportunities for additional funding for regional transit programs and projects. In most cases, these potential new revenue streams could be pursued independent of any changes to the region's decision-making framework. Each of the governance scenarios outlined below would, at a minimum, preserve access to existing revenue streams.

Governance vs. Service Delivery

A distinction must also be made between governance concepts and service delivery concepts. The region's decision-making process need not limit the way transit service is provided. Most governance

concepts presented in this memo would support multiple service delivery models, such as continued operations by existing service providers or nearly any form of contracted service.¹

Fixed-Route Focus

This memo limits the regional governance discussion to frameworks for *fixed-route service* in the region. This approach is necessary to make the initial exploratory process manageable. A focus on fixed-route service initially would not limit the expansion of any governance model to include additional services later, if desired.²

Preliminary Governance Scenarios

Table 1 provides a matrix of governance concepts ranging from the status quo, to enhanced forums and protocols for decision-making by existing agencies, to a fully integrated regional governance concept. Each scenario is briefly described in the narrative below. It provides preliminary information on each concept's potential advantages and challenges for regional decision-making, along with high-level implementation considerations. Where available, links to actual examples of each governance concept are also provided in Table 1.

Scenario 0: Status Quo

The "Status Quo" scenario continues the current agreements unchanged. The County contracts with providers (CTUIR, City of Hermiston, City of Pendleton, etc.) each STIF cycle to pass through funding for services. CTUIR has agreements in place with the City of Hermiston, City of Milton-Freewater, and City of Irrigon to receive funding for portions of the services operated within and to those communities. No agreements are in place for things like in-lane stopping (stopping in "traffic" as opposed to a bus pullout) of CTUIR buses. CTUIR is bound by several tribal policies (e.g., holidays, work hours of 7:30 AM – 4 PM) and has to develop separate budgets, shift agreements, organization charts, etc. to operate general public transit in addition to serving tribal members. Several efforts are duplicated across the providers in the County, with the most-recent STIF cycle seeing multiple marketing and administrative projects that could be consolidated under a single transit entity.

Scenario 1: Enhanced Status Quo

This scenario could include a variety of interim steps that partners could take in the near term to position themselves for improved organizational effectiveness over the long term. The Enhanced Status Quo scenario could be implemented through an updated MOU or interagency agreement, and the group could create an overarching charter or set of bylaws to formalize operating procedures and decision-making protocols. This scenario could also establish a more sustainable approach to funding the current regional mobility management program, such as through membership dues.

Scenario 1 could serve as a springboard to a more robust, formalized, and centralized decision-making framework later, or this scenario could stand alone as a long-term option for the group.

To increase the engagement of elected officials and key stakeholders in regional transit issues, an annual "summit" could be convened under the Enhanced Status Quo option. This would allow the partners to report on progress made over the past year and allow elected officials to interact with each

¹ A contracted service model could include one or more agencies separately or jointly contracting with an existing service provider. This model could also involve contracting with a third party, such as a non-profit or for-profit transit provider.

² Although we focus on fixed-route services for preliminary governance discussions, in some cases dial-a-ride service budgets may be tied to fixed-route funding. Additional analyses, beyond the scope of this planning study, may be needed to assess those budgetary connections as part of the implementation process for some of the governance concepts outlined in this memo.

other on regional transit issues as they provide input, feedback, or even direction on upcoming initiatives.

Additional tools could be considered as part of this scenario, such as a process to convene subcommittees to tackle specific topics in an annual work plan. The group could consider creating opportunities for lower-tier staff to serve on subcommittees for work plan topics. Including lower-tier staff in coordination activities could strengthen inter-agency relationships, making it easier and more comfortable for staff to partner over time.

Under this scenario, coordination would principally remain at the staff level, so group recommendations could still need to be carried back to each partner agency's governing body for action.

Scenario 2: Regional Transit Advisory Board (TAB)

Under Scenario 2, partners could establish a regional TAB focused on fixed-route transit matters. This scenario could be implemented through an interagency agreement. Each partner could be asked to appoint an elected representative or two to the new board. The agreement could also address sustainable funding for providing administrative support for the new board and for the region's mobility management program, such as through membership dues.

As an advisory group, the TAB could make recommendations, which would then be carried back to each partner agency's governing boards for action. Alternatively, partner agencies could vest their TAB representatives with decision-making authority for selected topics, such as approving regional transit plans and determining priorities for multi-county projects.

This scenario could stand alone as a long-term decision-making structure for the region, or it could serve as a springboard for further regionalization in the future. For example, a regional board of elected officials would provide the region with an essential forum for discussing and evaluating concepts such as those outlined in Scenario 4 below. The partners would need to establish how much representation and/or voting power is provided at the county, city, and tribal levels, and from other involved entities.

Scenarios 3A, 3B, and 3C: Single or Multi-County Districting

Table 1 includes scenarios for new service districts, including both joint and single-county districting options. The intent of these scenarios would be to consolidate existing fixed-route transit agencies to the extent possible.

Single-county districts would not reduce the complexity of regional decision-making (beyond potential consolidation of local services), but joint districting options would provide some regional decision-making benefits by reducing the total number of agencies involved. As stand-alone options, new districts would not bring any practical efficiencies to the overall regional decision-making process; however, they are included here because they offer the potential to increase elected oversight and generate additional revenue at the individual county level. Any new districting option could be combined with other governance scenarios in Table 1.

Under any districting option, CTUIR would continue to receive their own federal tribal transit dollars and STIF funding. CTUIR could choose to contract its service to a transportation district or to offer its service independently. For example, the Siletz tribe contracts most of its federal and STIF dollars to Lincoln County Transportation Service District and Tillamook County Transportation District, retaining some funding to provide fare discounts to tribal members in other locations throughout the state. Alternatively, a transportation district could contract its service to CTUIR. In any event, CTUIR would continue to be a partner in regional transit decision-making.

3A: Joint Morrow/Umatilla Service District

This concept would create a new two-county service district. This concept could streamline transit operations between two counties having substantial intercounty travel and create new options for local revenue generation in the counties. A public vote in both counties would be required.

3B: Joint Morrow/Umatilla/Union Service District

This concept would create a new three-county service district, and similarly promote intercounty travel and create new options for local revenue generation. A public vote in all three counties would be required.

3C: Single-County Service Districts

The creation of new single-county districts in Umatilla, Morrow and/or Union counties could offer additional revenue opportunities and enhance elected oversight of transit services within those counties. Single-county districting would not require one county to collaborate with another, and individual counties could pursue single-county districting options on their own at any time.

Scenario 4: Regional Co-op or Transportation Management Organization

A fourth scenario is the creation of a regional transportation cooperative (co-op) or a non-profit organization such as a transportation management organization (TMO), as a separate legal entity in the region.

Either option could be owned by, or have membership comprised of, the governing bodies of the current regional transit providers. A co-op or TMO would establish its own board and staff and could be set up to provide any or all transit services needed by its owners. If the owners wished, either a co-op or a TMO could operate as a new single fixed-route service provider for the entire region. Additional services might include regional transit planning, grant writing and reporting, marketing, data collection, and other needs common to the owners or members.

Co-ops are age-old systems of centralizing decision-making and providing access to services for businesses or organizations with similar needs. People in the region may be familiar with co-ops created for farming or utility service.

Co-ops are distinctly different from governmental groups formed through interagency agreements under ORS 190 in Oregon. A co-op is considered **a business entity**,³ while a TMO is **a private non-profit entity**. Neither would be a new unit of government. A co-op or TMO could have the potential to assist with fundraising activities for regional transit; for example, by creating programs for regional businesses to purchase advertising or to financially sponsor certain transit activities or events.

There are two ways a co-op or TMO's activities could be funded:

- » Existing transit providers could use their current revenue sources to purchase services from the co-op or TMO. In this case, the transit providers would still be the official applicants for state and federal grants and have ultimate responsibility for grant compliance.
- » In some cases, it may be possible for the co-op itself to be a grant applicant. For example, the Federal Transit Administration's non-urbanized area formula program (5311 program) allows ODOT to award grant funds to subrecipients that are private operators of public transportation services.

³ Unlike a TMO, a co-op is not considered a non-profit organization, but it is not intended to be a "for profit" entity either. Co-ops can make money, but any profits generated must be used for the benefit of the co-op owners or returned to the owners in the event of a surplus.

Table 1. Preliminary Governance Scenarios

Governance Scenario	Fixed-Route Service Models Supported	Advantages For Regional Decision-Making	Issues and Challenges For Regional Decision-Making	Implementation Considerations
<p>Scenario 0: Status Quo</p> <ul style="list-style-type: none"> No change. Contracts are in place between Umatilla County and transit providers to distribute STIF funding for service. CTUIR has funding agreements and contracts with several cities to provide service. 	<ul style="list-style-type: none"> Continued current agency operations Contract for service 	<p>CTUIR continues to serve as the de facto regional service provider.</p>	<p>Transit roles and responsibilities in the region are difficult for the average person to sort out, without wading through the numerous agreements that underpin the current services. Councils, commissions, and tribal governments have many competing responsibilities and priorities. Regional service levels dependent on tribal priorities and ability of local governments to fund contracted service.</p>	<p>Already implemented.</p>
<p>Scenario 1: Enhanced Status Quo</p> <ul style="list-style-type: none"> Create an umbrella charter for the member agencies to establish member expectations and decision-making protocols for the partnership. Form standing or ad-hoc subcommittees for staff-level interaction to tackle specific topics that may be identified in an annual or biennial work plan, such as <ul style="list-style-type: none"> Consistent policies for riders Ongoing route, schedule, and stop adjustments Regional data collection Performance reporting, etc. <p>Example: Although not a transit group, the Oregon Modeling Statewide Collaborative is an example of a staff-level multi-agency group that is pursuing a joint work plan. Partners agree to abide by operating procedures outlined in their work plan. Each OMSC subcommittee has a charter outlining the subcommittee's purpose, tasks, deliverables, and timeline for their work.</p>	<ul style="list-style-type: none"> Continued current agency operations Contract for service 	<p>Provides a bit more structure for decision-making on key topics, an annual check-in point for regional elected officials, and/or forums for lower-tier staff to interact regularly, which could strengthen regional relationships and avoid conflicts.</p>	<p>Perpetuates existing agreements. Much about the partnering structure could be clarified and documented through a chartering and work-planning process, but roles and responsibilities may still seem complex to the average person. Could improve engagement and awareness of elected officials.</p>	<p>Straightforward to implement with an informal charter, or one multi-agency MOU.</p>
<p>Scenario 2: TAB Implementation</p> <ul style="list-style-type: none"> A subcommittee of various member agency councils/commissions would serve as a central advisory board on transit matters. The regional decision-making process could be controlled by a new TAB IGA and bylaws. <p>Example: South Central Regional COG's Transportation Committee in Connecticut</p>	<ul style="list-style-type: none"> Continued current agency operations Contract for service 	<p>Could help to improve oversight and understanding of transit issues by partner agency elected officials. Could provide a central forum for prioritization of regional transit initiatives and projects.</p>	<p>Provides some enhanced oversight, but limited opportunities to increase funding.</p>	<p>Straightforward to implement, review of other boards should be done to identify and head off prior issues that were problematic for other agencies.</p>

Governance Scenario	Fixed-Route Service Models Supported	Advantages For Regional Decision-Making	Issues and Challenges For Regional Decision-Making	Implementation Considerations
<p>Scenario 3A: Joint Morrow/Umatilla Service District</p> <ul style="list-style-type: none"> A joint service district could streamline transit operations between the counties. This option would expand options for local revenue generation in the counties, including the potential for voter-approved property taxes, business license fees, income taxes, or employer payroll/self-employment taxes. A seven-member governing board would be elected from the district at large. <p>Example: None at this scale currently in Oregon. Tri-Met is a multi-county transit district in an urban region, and it was formed under the state's mass transit statutes, which are related but different from the transportation district statutes (ORS 267.510 to 267.650) that would apply in this case.</p>	<ul style="list-style-type: none"> New two-county entity as service provider for Morrow and Umatilla Counties Contract for service 	<p>Could increase elected oversight through a separate board of elected officials focused on transit oversight responsibilities.</p> <p>Could reduce current regional decision-making complexity, since one district would two counties with significant inter-county travel demand.</p> <p>This option could be combined with other scenarios on the list.</p>	<p>A requirement in ORS 267.540 for transportation district board members to be elected "at large" means that representation across a multi-county area may not always be as geographically equitable as desired.</p> <p>Citizens are generally less aware of, and have less understanding of, special districts compared to general-purpose governmental agencies like cities and counties.</p> <p>State laws require cities and counties to work together but do not always put the same obligation on special districts. In some cases, creation of a special district can lead to "siloeing" transit topics and issues. District managers must be sensitive to this potential and work proactively to integrate transit with other governmental initiatives related to land use, housing, recreation, economic development, etc.</p>	<p>Challenging to implement. Requires a public vote in multiple counties to create a new multi-county district, elect board members, and establish a revenue structure.</p> <p>An extensive public information campaign would likely be needed to explain potential benefits and costs. Success may require multiple attempts over several years.</p> <p>The joint district would have ongoing election expenses as board member terms expire.</p> <p>If there is interest in this concept, a detailed financial feasibility analysis should be done as a next step.</p>
<p>Scenario 3B: Joint Morrow/Umatilla/Union Service District</p> <ul style="list-style-type: none"> Similar to Scenario 3A 	<ul style="list-style-type: none"> New three-county entity as service provider for Morrow, Umatilla, and Union Counties Contract for service 			
<p>Scenario 3C: Single-County Districts</p> <ul style="list-style-type: none"> Creation of a new transportation service district in Umatilla, Morrow, and/or Union counties This would expand options for local revenue generation in counties. New single-county districts would expand elected oversight at the individual county level. <p>Example: The Grant County Transportation District is the nearest Oregon example.</p>	<p>New service providers in Umatilla, Morrow, and/or Union counties</p> <p>Contract for service</p>	<p>Could increase elected oversight in each individual county, but this option alone would not afford significant advantages for decision-making at the regional level.</p> <p>This option could be combined with other scenarios on the list.</p>	<p>Citizens are generally less aware of, and have less understanding of, special districts compared to general-purpose governmental agencies like cities and counties.</p> <p>State laws require cities and counties to work together but do not always put the same obligation on special districts. In some cases, creation of a special district can lead to "siloeing" of transit topics and issues. District managers must be sensitive to this potential and work proactively to integrate transit with other governmental initiatives related to land use, housing, recreation, economic development, etc.</p>	<p>Less challenging to implement than multi-county districting scenarios described above (3A and 3B), but would still require a public vote in each individual county to establish the districts, elect initial board members, and establish a tax/fee structure.</p> <p>An extensive public information campaign would likely be needed to explain potential benefits and costs. Success may require multiple attempts over several years.</p> <p>Each new district would have ongoing election expenses as board member terms expire.</p>

Governance Scenario	Fixed-Route Service Models Supported	Advantages For Regional Decision-Making	Issues and Challenges For Regional Decision-Making	Implementation Considerations
<p>Scenario 4: Regional Cooperative or Transportation Management Organization</p> <ul style="list-style-type: none"> • Creation of a regional transportation co-op as a separate legal business entity. • Co-op would have its own board and staff • A co-op could provide any or all transit services required by its region. • Current transit agencies could be owners of the co-op or members of the TMO. • Owners/members would elect the co-op board officers. • Except in rare cases, co-ops have a “one member, one vote” rule. • Owner/members’ responsibilities: <ul style="list-style-type: none"> ○ Select directors to serve on the co-op board ○ Provide necessary capital through membership fees and by purchasing the co-op’s services • Board responsibilities: <ul style="list-style-type: none"> ○ Hire a manager ○ Adopt general policies ○ Develop and adopt long-range plans and business strategies ○ Oversee the operating budget ○ Establish institutional controls ○ Retain an auditor and legal counsel • Manager responsibilities: <ul style="list-style-type: none"> ○ Manage capital and physical resources ○ Hire, train, supervise, and set compensation for employees ○ Oversee operations ○ Maintain books and accounting system ○ Furnish info needed for board decisions and planning ○ Existing revenue streams currently used by the partner agencies to fund transit services could be retained. The co-op could potentially assist with other regional fundraising strategies, such as providing opportunities for regional businesses to purchase advertising or sponsor certain transit activities or events. <p>Example: The Greater Yellowstone Regional Transportation Cooperative is an example of a transit partnership by governmental agencies and private business interests in three states: Idaho, Montana and Wyoming. It came together relatively quickly and provided transit service between the national park and surrounding gateway communities for three years, before being suspended in 2014 due to funding issues.</p>	<ul style="list-style-type: none"> • Co-op or TMO as single regional fixed-route service provider • Continued current agency operations • Contract for service 	<p>Enhanced stewardship and oversight by regional elected officials in a single forum. Potential for improved public transparency on transit issues. Co-ops and TMOs have a democratic approach to ownership that allows the needs of all owners to be met without one member dominating the decision-making process.</p> <p>Citizens may be familiar with the co-op concept through experience with utility or farm co-ops in the region. Similarly, non-profit groups are commonly understood by the general public.</p> <p>Could centralize many transit functions for the region to achieve an economy of scale and improved administrative/ operational efficiency.</p> <p>Centralized services could include (but need not be limited to):</p> <ul style="list-style-type: none"> • Planning • Grant writing/monitoring/reporting⁴ • Fixed-route service • Dial-a-ride service • Marketing • Data collection 	<p>Co-op owners share the same prices for all co-op services. Some current partners may experience savings, others may not.</p> <p>Day-to-day operational and management decisions can be made quickly, but other decisions requiring all owners to weigh in may take more time than individual agencies currently experience.</p>	<p>Moderately straightforward. (Easier than new districting concepts.)</p> <p>Although a public vote is not required to form a co-op or a TMO, the governing bodies for each agency partner would need to formally agree to form and own it. If partners wished to have the co-op or TMO operate a regional fixed-route system, the new co-op or TMO board and manager would need to secure equipment and facilities. At the outset, this could be done through an interagency transfer of existing assets (vehicles, maintenance facilities, etc.) from existing transit agencies to the co-op. However, special authorization may be needed from ODOT to transfer equipment and facilities originally purchased with state or federal grant funds.</p> <p>If there is interest in this concept, a detailed feasibility analysis should be done as a next step, to:</p> <ul style="list-style-type: none"> • Identify the specific services the co-op or TMO would provide, and • Understand potential financial benefits and impacts for each potential owner.

⁴The co-op itself would not likely be a direct recipient of state and federal grant funding. For example, the co-op might help by providing grant writing services, but member agencies would still be the grant applicants and be responsible for grant compliance.

Evaluation

This section provides a preliminary rating of whether each scenario would be better, worse, or about the same as the status quo, using the screening criteria bulleted below.






Screening Criteria

- » System Clarity for Customers and the General Public
 - Clarity of system information for different types of users (commuters, residents, tourists)
 - Clarity of regional roles and responsibilities
 - Identifiable regional brand
- » Government Accountability, Oversight, and Policymaking
 - Elected official engagement in, and understanding of, regional transit matters
 - Consistency of rider policies across the region
 - Consistency of internal policies, such as contracting standards and employee compensation
 - Suitability of the scenario, given other local, regional, and state policies
 - Potential to align with land use planning processes
- » Regional Equity
 - Ability to achieve balanced decisions that do not unduly favor the needs of some over others
 - Comparable voice/representation for residents in each county
 - Improved transit opportunities in each county
 - Avoiding disproportionate focus on the needs of people outside the region
- » Operational Efficiency
 - Economy of scale for major purchases, such as maintenance facilities, fleet, other equipment, stop furnishings, etc.
 - Efficiency of administrative functions
 - Efficiency of maintenance activities
 - Streamlined communications and dispatching across the region
 - Efficiency and communication of day-to-day route, stop and scheduling decisions
 - Potential to streamline long-range transit development plans
 - Consistency of data collection and performance reporting processes
 - Access to resources for emergencies
- » Agency Staff Burden and Expertise
 - Impact on existing agency labor burden
 - Access to skilled and experienced transit staff
- » Funding
 - Potential for new revenue streams

- Effect on current revenue streams
- Legitimacy in the eyes of funders and legislators

The scale used to rate scenarios based on the criteria listed above is as follows:

Screening Ratings

-  Much better than status quo
-  Somewhat better than status quo
-  No effective change
-  Somewhat worse than status quo
-  Much worse than status quo

The complexity of the implementation process varies significantly between scenarios. So as a final screening activity, we rate the realistic potential for implementing each scenario, using the following scale:

Implementation Complexity Ratings

- 1** - Minimal or no barriers to implementation
- 2** - One or two complicating factors
- 3** - Several complicating factors
- 4** - Many complicating factors
- 5** - Not likely feasible to implement

The cost to implement each scenario will depend on many factors, including how much of the facilitation and formation effort can be absorbed by existing agencies. For comparison purposes, the following high-level scale was used, assuming a full-service consulting team would be hired at market rates to facilitate implementation, with agency staff in advisory roles only.

Estimated Implementation Cost

- \$** - Under \$200,000
- \$\$** - \$200,000 to \$500,000
- \$\$\$** - \$500,000 to \$1,000,000
- \$\$\$\$** - Over \$1,000,000

Table 2 shows a high-level summary of how each scenario compares to the status quo using the rating scales described above. A detailed discussion of the reasoning behind the ratings for each scenario follows the table.

Key takeaways:

- » Scenarios which centralize regional operations (Scenario 4) under one organization have the greatest potential to improve clarity of system information for customers and the general public.
- » All organizational scenarios provide at least some level of improvement in overall government accountability, policymaking, and oversight; however, scenarios that establish a formal forum for interaction between elected officials (Scenarios 2 and 4) would provide the largest benefits in this area.
- » The level of service possible in different geographic areas of the region is highly dependent on each county's financial position and how much each existing transit agency can afford to purchase for their residents.
- » Scenarios that centralize operations under a single agency (Scenario 4) would provide the greatest economy of scale for the region in nearly all aspects of transit program delivery: planning, purchasing, operating, contracting, maintenance, etc.
- » Scenarios that create new agencies, such as new single-county service districts (Scenario 3C) or a regional co-op or TMO (Scenario 4) would remove the administrative burden of transit programs from existing partner agencies. Of these, the centralized concepts for Scenario 4 could give the partners access to potentially greater staff-level expertise than is currently possible since staff at county agencies must often wear multiple hats.
- » Scenarios that create new transportation districts (such as Scenario 3) have the potential to improve the region's transit funding outlook with new local revenue streams.
- » Single-county transportation districts in Umatilla, Morrow, and Union counties (Scenario 3C) would be challenging, but feasible to implement, and many examples of single-county transit districts exist in Oregon. However, scenarios that involve joint districting of two or more counties under existing statutes, such as a joint Morrow County/Umatilla County transportation district (Scenario 3A), or a joint Morrow County/Umatilla County/Union County transportation district (Scenario 3B), would require successful public elections across several counties, and are not likely feasible to implement.



Umatilla County Transit Development Plan

Table 2. Organizational Scenario Screening Summary

Organizational Scenario	System Clarity for Customers and the General Public	Government Accountability, Oversight, and Policy-making	Regional Equity	Operational Efficiency	Agency Staff Burden and Expertise	Funding	Implementation Complexity	Estimated Implementation Cost
Scenario 1: Enhanced Status Quo							1	\$
Scenario 2: Regional Transit Advisory Board							1	\$\$
Scenario 3A&B: Joint Districting							5	\$\$\$\$
Scenario 3C: Single-County Districting*							3	\$\$\$
Scenario 4: Regional Co-op or TMO							2	\$\$\$\$

Ratings above indicate each scenario's likely impact *for the region overall*, not for individual counties.

Ratings Legend (with respect to the status quo):

Much better Somewhat better About the same Somewhat worse Much worse

Implementation complexity:

1 – Minimal or no barriers to implementation | 2 – One or two complicating factors | 3 – Several complicating factors | 4 – Many complicating factors | 5 – Not likely feasible

*Scenario 3C could be combined with Scenario 1, 2 or 4 to improve the funding outlook under those scenarios.

Scenario 0: Status Quo

Description. Scenario 0 is the baseline to which we compare all other scenarios. The status quo assumes no change to current agreements between the County and providers, and between CTUIR and local cities. Regional communication and cooperation are ad hoc, without a defined decision-making process.

The current agreements are a staff-level effort with no decision-making authority. There is no forum for interaction between regional elected officials. Recommendations are carried back to each individual transit provider's governing body for approval.

System Clarity for Customers and the General Public. The Umatilla County website links to Eastern Oregon GO (EOGO), which further links to each public transit service in or near Umatilla County. Partner agencies maintain their own individual websites. Multiple agencies operate service across the region, and buses may carry different branding depending on the operator.

Government Accountability Oversight and Policymaking. Coordination between current transit provider partners occurs at the staff level. There is currently no formal forum for interaction between elected policymakers at the regional level on transit matters.

Regional Equity. Because coordination is at the staff level, there is limited representation for members of the public in regional transit discussions. The type and frequency of transit service in each area varies.

Operational Efficiency. Transit provider staff coordinate informally to streamline connections between service providers. Partners have entered into multiple agreements as needed to allow one partner to provide service within a neighboring jurisdiction and could continue to do so. Under the status quo scenario, the group has the ability to develop interagency agreements for any future services to be provided and could also explore things like joint procurement processes that could improve their collective purchasing power. Each agency collects its own data to serve its individual needs, and there is currently no regional performance reporting process apart from STIF reporting requirements.

Agency Staff Burden and Expertise. The transit providers have limited staff to manage transit operations, and most have other duties for their agency in addition to their transit roles.

Funding Opportunities. Each jurisdiction currently determines its own budget for transit planning, operating, maintenance, and capital needs. Each does its own grant writing and grant administration. No agency has the authority to generate dedicated local transit revenue through taxes and fees, with local funding coming through general funds.

Implementation Complexity: 1 – minimal or no barriers.

Implementation Timeline: None.


Implementation Cost: No cost.


Policy Conflicts: None known.

Scenario 1: Enhanced Status Quo


Description. Multiple existing agreements would be replaced with a single Memorandum of Understanding (MOU) or Intergovernmental Agreement (IGA) to clarify expectations of all agencies and define decision-making protocols in writing. The group would establish membership dues to cover the cost of administering and facilitating their joint activities. An annual work plan would be prepared, and the group would form subcommittees to tackle specific topics identified in the work plan, such as improving consistent policies for riders; coordinating day-to-day route, schedule, and stop adjustments; regional data collection, etc.


Annually, a joint meeting or "summit" would be held with elected officials from all partner agencies, so that staff could keep policymakers apprised of progress on work plan tasks and solicit their input and direction on regional plans and programs.

 **System Clarity for Customers and the General Public.** Scenario 1 is likely to have limited benefits for public understanding of system information and agency roles and responsibilities. It may be possible to continue working toward branding of fixed-route buses, stop locations, printed schedules, etc. with a single identifiable name and logo. However, some confusion for customers may be unavoidable if transit agencies with smaller vehicle inventories need to use vehicles interchangeably for fixed-route and separately branded dial-a-ride services. While Scenario 1 could help to clarify interagency responsibilities for the agency partners themselves, roles and responsibilities will still seem complex to the average person.

 **Government Accountability Oversight and Policymaking.** The addition of an annual forum for limited interaction between elected officials could improve understanding of regional transit issues by policymakers. Scenario 1 could also convene a subcommittee to recommend ways to improve consistent policies in limited areas – for example, rider behavior policies. However, establishing consistent standards for contracting and consistent employee compensation packages for transit staff is not likely feasible under this scenario since those types of decisions are embedded in each provider's agency-wide policies and procedures that apply to more than just transit.


Scenario 1 would not likely change the way transit programs currently fit within the area's local, regional, and state contexts and land use planning processes.


 **Regional Equity.** Because the group's work would still be done at the staff level, Scenario 1 would not change representation for regional residents on transit matters. The ability to ensure transit opportunities throughout the region would be about the same as it is today. The existing push and pull between some partners' desire to focus principally on service for their own local residents, and other partners' interest in regional service would require more interaction between elected officials than Scenario 1 provides, so it is unlikely to be resolved under this scenario.

 **Operational Efficiency.** The basic way that fixed-route service is provided would remain unchanged and only incremental improvements in coordinated operations would likely be possible under Scenario 1. For example, a staff-level subcommittee could be convened to develop recommendations for a joint procurement process, so that multiple partners could take

advantage of a single procurement effort to buy new vehicles. (However, this could probably be done today under the status quo scenario.) More complex strategies for improving operational efficiency, such as establishing shared maintenance facilities, are likely to be challenging.

The efficiency of administrative functions is unlikely to change since each existing transit provider would continue to manage its own transit program, requiring its own separate administrative staff. Multiple agencies would continue to provide fixed-route service, and Scenario 1 would continue the practice of using multiple interagency agreements to allow transit agencies to provide select services. The group could attempt to consolidate and reduce the number of service providers operating in the region, for example by having multiple partners contract with the same service provider. However, the result is likely to still be a “piecemeal” approach, albeit with perhaps fewer “pieces.”

 **Agency Staff Burden and Expertise.** Scenario 1 is unlikely to significantly change the labor burden for existing transit agency partners, but additional staff capacity at Umatilla County or another entity would be needed for a more robust coordination effort. Scenario 1 would not change the level of skill and experience in transit planning and operation that is currently available to each agency. The group could explore shared training opportunities now, under the status quo, and Scenario 1 is not likely to appreciably improve those training opportunities.

 **Funding Opportunities.** Scenario 1 would have no impact on current revenue streams or funding opportunities.

Implementation Complexity: 1 – Minimal barriers. The Enhanced Status Quo scenario would be straightforward to implement with a new MOU or IGA. The chief complicating factor would be finding a way to incrementally increase resources for the ongoing facilitation effort.

Implementation Timeline: 6 months to develop a new MOU or IGA.

Implementation Cost: Under \$200,000

Policy Conflicts: None known.


Scenario 2: Regional Transit Advisory Board


Description. A board of elected officials (1 or 2 from each county, CTUIR, and local cities) would be convened as a central policy body on regional transit matters. The board would be created with a new IGA signed by all partners that would define the board's roles, responsibilities, and decision-making authorities for the regional transit program.

The board's purpose would be to provide policy-level input on regional transit plans, programs, and initiatives; to prioritize regional transit projects; and to recommend plans and strategies for ultimate adoption by each agency's decision-making body. Alternatively, the board could be vested with the authority to approve regional transit plans and projects outright. Bylaws would be written to describe board member eligibility and expectations, member dues, officers, meetings, and rules of procedure.

A Regional Transit Advisory Board could serve as a long-term policy-level forum for the region, or could be used as a springboard to help form a new centralized transit organization for the region, such as a regional cooperative or transportation management organization.


The existing staff-level coordinating committee for the providers could continue in a technical advisory role to the regional board.

 **System Clarity for Customers and the General Public.** As with Scenario 1, Scenario 2 is likely to have limited benefits for customer and public understanding of system information and agency roles and responsibilities. It may be possible to continue working toward branding fixed-route buses, stop locations, printed schedules, etc. with a single identifiable name and logo. However, some confusion for customers may be unavoidable if transit agencies with smaller vehicle inventories need to use vehicles interchangeably for fixed-route and separately branded dial-a-ride services. While Scenario 2 could help clarify interagency responsibilities for the agency partners themselves, roles and responsibilities will still seem complex to the average person.


 **Government Accountability, Oversight and Policymaking.** Scenario 2 would significantly expand elected official engagement, allowing policymakers from partner agencies to interact. Frank discussions at the policy level on divisive issues could help policymakers understand the reasons behind each other's positions, increasing the chance of finding common ground or workable compromises. A board of elected officials would be subject to Oregon's open meeting laws, thereby increasing public accountability.

A board of elected officials could help to vet strategies for streamlining policies that affect riders. Establishing consistent standards for contracting and consistent employee compensation packages for transit staff would likely remain challenging, though, because these topics are embedded in each agency's governing philosophy and decisions in these areas affect more than just transit programs.


Because a regional transit board would be a forum for information and idea exchange at the elected level, it could help to confirm the suitability of transit proposals within the context of other local, regional, tribal, and state policies. Scenario 2 would also provide a policy-level forum to better assess how transit projects and programs align with regional land uses.

 **Regional Equity.** A well-balanced regional transit board that includes elected officials from all partner agencies would ensure that residents across the region are represented as transit plans and programs are developed. A policy-level board could discuss the needs of regional residents and employees alongside transit options that serve visitors, and come to a joint position on an appropriate balance for the region.


A place at the table for policymakers from each partner agency would also ensure that transit improvement opportunities are considered for all parts of the region, although service levels across the region would still depend on the resources available to each partner.

 **Operational Efficiency.** A regional transit board would focus on high-level planning and policy issues and would not likely provide operational direction. The way that transit service is provided would remain unchanged. Multiple agencies would continue to provide fixed-route service with multiple interagency agreements as they do today. The regional board could serve as a forum for better elected official understanding of joint maintenance, procurement, and

contracting issues and opportunities, but those issues and opportunities would be the same as in the status quo scenario.

 **Agency Staff Burden and Expertise.** Scenario 2 is unlikely to appreciably change the labor burden for existing partners; however, the level of ongoing staff support provided to administer and facilitate the new board would significantly increase.

Scenario 2 would not change the level of skill and experience in transit planning and operation that is currently available to each agency.

 **Funding.** Establishing a regional transit board would not significantly change current or future revenue opportunities. A better coordinated, more efficient regional transit system could ultimately result in increased ridership and farebox revenue.

Implementation Complexity: 2 – One or two complicating factors. The formational process requires only an IGA and written bylaws. This scenario would be straightforward to implement. The main complicating factor is identifying the resources needed to undertake the formational process, and to cover an increased ongoing facilitation effort.

Implementation Timeline: 6 months to develop a new IGA.


Estimated Implementation Cost: \$200,000 to \$400,000


Policy Conflicts/Solutions: No conflicts if the TAB's role is advisory only. If the partners wish the TAB to have decision-making authority on select topics (such as approving regional plans or prioritizing regional projects for funding), this authority would need to be vested in the advisory board by each existing governing body in the region. Any desired decision-making authorities for the new board could be addressed in the IGA.

Scenario 3A and 3B: Joint Districting


Description. These concepts would create new two- or three-county transportation districts under ORS 267, either between Morrow and Umatilla counties (Scenario 3A) or between Morrow, Umatilla, and Union counties (Scenario 3B). A new governing board of elected officials would be established to oversee all of the district's transit activities, including funding, planning, operations, and maintenance.


Either of these options could be combined with Scenario 1, 2, or 4, but this evaluation considers them as stand-alone options when comparing them to the status quo.


 **System Clarity for Customers and the General Public.** City and county transit functions would be consolidated within each multi-county area, but CTUIR would retain its independent funding sources and ability to provide service. Other agencies would continue to be involved in planning and delivering transit services connecting to the district's services. As a result, while some consolidation of agency responsibilities would result, Scenarios 3A and 3B are not likely to significantly improve overall customer and public understanding of agency roles and responsibilities throughout the region.


 **Government Accountability, Oversight and Policymaking.** Joint districting would establish elected oversight boards focused solely on transit, which would increase elected official

engagement within each new district's service area. Transit policies and standards would be more consistent than the status quo, since a single agency would be managing those issues for a multi-county area. Contracting standards and employee compensation packages would be consistent across the counties forming a joint district, and no longer tied to all other county functions.

 **Regional Equity.** Although each new district would have its own board of elected officials, giving residents within each new multi-county district greater representation,⁵ regional coordination would remain at the staff level under Scenarios 3A and 3B. Therefore, these scenarios would not appreciably change the representation of regional residents on regional transit matters that affect more than one agency. The ability to ensure transit opportunities in all counties would be about the same as it is today.

 **Operational Efficiency.** Scenarios 3A and 3B would consolidate operations in each multi-county area, streamlining administrative and maintenance functions, and simplifying day-to-day route, stop and scheduling decisions within each multi-county area. From a regional coordination perspective, there would be fewer agencies at the table, which should make the overall coordination effort easier.

 **Agency Staff Burden and Expertise.** Consolidating the management and operation of services in multiple counties would remove transit responsibilities from existing agency staff. Since the new district's staff would be focused solely on transit matters, it may be possible for them to develop a higher level of transit knowledge and expertise than is currently feasible for agency staff who often wear multiple hats under the status quo.

 **Funding.** Joint district scenarios would increase opportunities for local revenue generation compared to the status quo. A transportation district would expand options for local revenue generation, including opportunities for voter-approved property taxes or business license fees. These additional revenues could be used to directly fund transit service and/or to leverage larger amounts of state and federal grant funding for transit. Obtaining voter approval for tax levies could present challenges depending on the political environment at the time. For a tax levy to be voter-approved, residents need to understand the extent of the impact to their taxes as well as the benefits of establishing the levy. Demonstrated success of these transportation districts and clear communication to voters would be necessary.

Implementation Complexity: 5 – Not likely feasible. Both joint districting options are extremely challenging to implement and include complicating factors that are likely insurmountable. Each joint district would require public votes in a multi-county area. Feasibility studies would be needed first to understand potential benefits and costs, and extensive public information campaigns would be needed to make the case to voters. These efforts may require multiple attempts over many years, with no guarantee of success. It is telling that there are no suitably

⁵ In Oregon, transportation service district board members are elected by a public vote within the service district boundary. Seven board members would be elected from the district area at large, so equitable geographic representation is less assured.

comparable examples of multi-county districts in Oregon. Due to implementation complexities, we have given these scenarios an implementation rating of “Not likely feasible to implement.”

Implementation Timeline: The formational process could take approximately one year, assuming it culminates in a successful election. As board members are elected rather than appointed from existing governing bodies, board elections could be concurrent with the election to form the district, or a subsequent election could be held, adding 6 months to the timeline.

Once a joint district has been formed and board members elected, an additional 6-month startup period would be needed to help the new board with internal organization matters, such as hiring a manager, implementing an operational service plan, and developing internal policies and procedures. If the public vote to form a joint district is not successful (a highly likely scenario in the case of joint districts), the implementation timeline would need to be extended through future election cycles.


Estimated Implementation Cost: Over \$1M


Policy Conflicts/Solutions: None known.


Scenario 3C: Single-County Districts

Description. This scenario would create a new transportation district in Morrow, Umatilla, and/or Union counties.⁶

Combining this scenario with either Scenarios 1, 2, or 4, would improve funding opportunities under those other three scenarios. However, this evaluation considers Scenario 3C as a stand-alone option for comparison to the status quo.


 **System Clarity for Customers and the General Public.** Compared to the status quo, there would still be a separate entity with transit management responsibilities in each county (separate from CTUIR), and the same issues that exist today related to clarity of system information, regional roles and responsibilities, and regional branding would remain unchanged.


 **Government Accountability, Oversight and Policymaking.** New single-county transportation districts would establish elected oversight boards in each county focused solely on transit, increasing elected official engagement on county-specific transit matters. Collaboration between partner agencies to address things like rider policies, uniform contracting standards, and consistent compensation packages for transit employees would be somewhat easier since those issues would and no longer embedded within county government.


 **Regional Equity.** Although people within each new district would be represented by a board of elected officials, regional coordination would still be at the staff level under Scenario 3C. As a result, this scenario would not appreciably change the representation of regional

⁶ Oregon has more than one districting option. In Oregon, a Special Transportation District (ORS 267.520), requires a vote of the people to form, elect board members, and approve revenue levies. Alternatively, a County Service District (ORS 451.487) can be formed in Oregon by a resolution of the county commissioners but must be referred to the voters for approval, and any proposed levies must also be voter-approved. We are assuming the Special Transportation District option for our analysis because it has the advantage of an elected board focused only on transit.

residents on regional transit matters that affect more than one county. The ability to ensure transit opportunities in all counties would be about the same as it is today.

 **Operational Efficiency.** A separate transportation district in each county would not reduce the current coordination effort. Depending on the degree to which each new district contracts its service, districts could have their own administrative, planning, maintenance, and/or operations staff, perpetuating some of the redundancies that currently exist across the region. Multiple agencies would continue to provide fixed-route service as they do today.

 **Agency Staff Burden and Expertise.** Creation of a new transportation district would remove the burden of managing transit activities from existing agency staff. Additionally, since each new district's staff would be focused solely on transit matters, it may be possible for them to develop a higher level of transit knowledge and expertise than is currently feasible for county staff, who often wear multiple hats under the status quo.

 **Funding.** A significant advantage of this scenario is the potential to increase local revenue generation across the region. A new transportation district would open opportunities for voter-approved property taxes or business license fees. As with Scenario 3A and 3B, relying on voter approval for tax levies comes with significant barriers and risks in securing adequate funding. These additional revenue streams could be used to directly fund transit service and/or leverage larger amounts of state and federal transit grant funding. T

Implementation Complexity: 4 – Many complicating factors. Public votes would be required to create each district and establish a tax/fee revenue structure. Financial and other feasibility analyses would be needed to determine benefits and costs as part of making the business case to the public. A public election would be held to select new board members. These challenges notwithstanding, there are numerous examples of successful county-wide transportation districts in Oregon. Therefore, despite an implementation rating of 4 – “many factors complicating implementation” – this is a feasible scenario.

Implementation Timeline: The formational process could take approximately one year, assuming it culminates in a successful election. Board elections could occur concurrent with the election to form the district, or a subsequent election could be held, adding 6 months to the timeline.

Once a district has been formed and board members elected, an additional 6-month startup period would be needed to help the new board with internal organization matters, such as hiring a manager, implementing an operational service plan, and developing internal policies and procedures. If the public vote to form a joint district is not successful, the implementation timeline would need to be extended through future election cycles.

Estimated Implementation Cost: \$500,000 to \$1M

Policy Conflicts/Solutions: None known.

Scenario 4: Regional Cooperative or Transportation Management Organization

Description. Scenario 4 would create a regional cooperative business entity (co-op) or a non-profit transportation management organization (TMO). The new organization would have its own board and staff and could provide any or all transit services needed in the region. For the purposes of this evaluation, we assume that the co-op or TMO would be a full-service

organization responsible for all fixed-route planning, transportation system development, and service delivery, providing a single central transit provider for the region.

The existing transit providers could jointly form the new organization and be “owners” in the case of a co-op, or “members” in the case of a TMO. Ownership or membership need not be limited to the current transit providers. If desired, owner/member opportunities could be made available to others who may benefit from or help to fund transit service in the region (for example, individual cities, state agencies, large employers, business and tourism groups, social service organizations, and others.)

Different laws apply to the formation of co-ops and TMOs, but the general governance concept is similar for both. Owners/members would elect board officers from their ranks and fund the new agency through membership fees and by purchasing services from the new organization.

The board's responsibilities would include hiring a manager; adopting policies and procedures to be followed; developing long-range plans and business strategies; overseeing the organization's budget; establishing internal controls to assure fiduciary responsibilities are met; and retaining auditors and legal counsel as needed.

The manager would be responsible for overseeing the agency's physical and financial resources, staff, and accounting system. The manager would also determine employee compensation levels and ensure the board has accurate and relevant information needed to make informed decisions.



System Clarity for Customers and the General Public. This scenario would consolidate all fixed-route transit functions and responsibilities under a single entity, allowing consistent branding throughout the region and providing a single point of contact and source of information for customers and the public.



Government Accountability, Oversight and Policymaking. Much of the accountability, oversight, and policymaking responsibilities would shift to a new co-op or TMO board, which would be a business entity, not a unit of government. That said, the co-op or TMO board would include elected officials, so “government accountability” is still a valid consideration here. Also, much of the funding for the new organization would flow through existing governmental agencies, who would retain their current responsibilities for ensuring compliance with grant and funding requirements.

Scenario 4 would establish a single set of policies for riders and resolve current differences in other policy areas. For example, variations in employee compensation packages that currently place some agencies at a disadvantage in the labor market would be eliminated, and the consistency of wages for transit employees across the region could improve.

Differences in contracting standards would also be resolved. For example, existing transit agencies may have different financial incentives or penalties for contractor performance that affect contractors' risk and profit potential. During times when there is high demand for limited contracted services, agencies requiring less-favorable contracting terms will be at a disadvantage in the marketplace. Disparities like this would be eliminated under Scenario 4.

A new co-op or TMO would provide a central forum for exchange of information and ideas between regional policymakers, so it could help confirm the suitability of transit proposals within

the context of other local, tribal, and state policies. Scenario 4 would also provide a single policy-level forum to better assess how transit projects and programs align with regional land uses.



Regional Equity. The co-op or TMO board could be structured to ensure all geographic areas and broad interests in the region are represented. Board voting methods and other rules of procedure could be structured to avoid unduly favoring the needs of some over others.

Compared to the status quo, a central organization would be in a better position to evaluate and attempt to resolve differences in transit improvement opportunities between agencies. However, some opportunities would still be tied to funding flowing through each county and CTUIR. Because of this, some owners/members would still be able to afford a greater amount of service than others.



Operational Efficiency. A co-op or TMO as a regional service provider has significant advantages over the status quo for nearly all aspects of operational efficiency. Administrative functions could be centralized, eliminating existing redundancies. A single organization serving the entire region would wield more buying power than current partner agencies individually, providing an economy of scale for major purchases.

Maintenance functions would be streamlined, and operational practices would be consistent across the region. The regional fleet could be optimized, and backup vehicles and equipment more easily deployed to different parts of the region when needed.

Data collection, regional system performance monitoring and reporting would be streamlined under a central organization.



Agency Staff Burden and Expertise. A central co-op or TMO would remove the burden of managing transit activities from existing agency staff. Additionally, Scenario 4 could give the entire region access to experts on staff with a significant depth and breadth of transit system management and technical experience.



Funding. A central co-op or TMO would allow the partners to speak about funding needs with one voice, potentially giving the region greater influence in transit funding decisions at the state level.

Responsibility for securing funding for transit programs and services across the region would likely be shared by existing governmental agencies and the new co-op or TMO. In some cases, the new regional organization may be eligible to apply for grant funding itself. For example, the Federal Transit Administration's non-urbanized area formula program ("5311" program) is commonly used to fund fixed-route service outside of metropolitan areas. FTA's rules allow ODOT to award 5311 funds to private operators of public transportation services, such as a regional co-ops or TMOs. Conversely, Oregon's Statewide Transportation Improvement Fund (STIF) does not permit co-ops or TMOs to apply for funds directly. Instead, qualified entities would still need to apply for STIF funds, and then use them to purchase services from the co-op or TMO. A regional co-op or TMO could provide grant-writing services and help with grant compliance reporting to lessen this burden. However, reporting requirements may still be duplicated (ex. For the

Hermiston – Boardman Connector, currently tracked by CTUIR, Umatilla County, and Morrow County).

A co-op or TMO could also help raise funds for regional transit, for example by selling advertising or providing opportunities for regional businesses to sponsor certain transit services, activities, or events. With adequate support from the community that the co-op or TMO serves, implementation of these techniques requires minimal effort with a potentially significant capacity to raise revenue. The additional funding opportunities and the ability to better coordinate applying for and obtaining these funds present significant benefit to partners.

Implementation Complexity: 2 – One or two complicating factors. While the facilitation effort to create a new co-op would be significant, the implementation process is straightforward with few barriers. A public vote is not required. A financial feasibility analysis and business plan should be prepared to understand advantages and tradeoffs more thoroughly for the agency partners. A legal review of statutes that govern co-ops and nonprofit organizations should also be performed to help decide which type of entity would be most advantageous for the region.

Examples of complicating factors for implementing Scenario 4 are finding the resources needed to facilitate the formational effort and determining whether and how to transfer existing transit vehicles, equipment, and facilities to the new organization.

Implementation Timeline: The formational process could take approximately one year. During this time, legal research would be done to determine the most advantageous state statutes under which to organize. A business plan would also be prepared, for agreement by all parties, to determine board composition and staffing, operating plan, capital needs assessment, initial budget proposal, and funding responsibilities. Once formed, an additional six-month startup period would be needed for the new board to establish bylaws, hire staff, and develop policies and procedures for the new organization.

Implementation Cost: Over \$1M

Policy Conflicts/Solutions: A policy issue for Scenario 4 is that there is currently no forum where current transit agency elected officials can interact to jointly discuss advantages and tradeoffs of regionalization and resolve differences. This could be addressed by first implementing Scenario 2.

Legal research beyond the scope of this project would be advisable before further implementation work occurs, to scan for potential conflicts within each partner agency's laws and rules for elected official service on a private organization's board.

Funding Opportunities

All scenarios other than the current status quo (Scenario 0) present new opportunities for increasing coordination among the partners. Scenarios 1 and 2 offer better policymaking and government oversight, potentially increasing public perception of the reliability of the transit systems. Scenarios 3 and 4 positively affect the operational efficiency and government oversight of the transit system. Scenario 3 would unlock the possibility for a significant amount of new revenue through district levies.

Additionally, Scenario 4 improves system cohesion, supporting a more consistent approach to branding and marketing across the region. A transit system that is designed and managed more cohesively, operates more efficiently, and communicates services clearly to the public has the

potential to attract more ridership and associated farebox revenue, advertising revenue, and donations.

Additionally, Scenarios 3 and 4 could meaningfully improve the partners' ability to leverage state and federal grant funds.

Table 3 summarizes the funding opportunities potentially made available through each scenario. The table provides a qualitative assessment about the relative ease across scenarios of generating additional revenue from each source. This assessment does not include considerations about political viability or adequacy of specific revenue sources.

Table 3. Funding Opportunities Summary

Potential New Revenue Opportunity ¹	Scenario 1: Enhanced Status Quo	Scenario 2: Regional Transit Advisory Board	Scenario 3A&B: Joint Districting	Scenario 3C: Single-County Districting	Scenario 4: Regional Co-op or TMO
Opportunity to increase advertising and fundraising revenue	Low	Low	Low	Low	High
Introduction of tax levy	None	None	High	High	None
Opportunity to increase federal grant disbursements	Low	Low	Medium	Medium	Medium

¹Scenario 4 could be combined with 3A, 3B, or 3C to unlock tax levy revenue options in addition to the potential revenues identified for Scenario 4 alone.