

COMMUNITY TRANSPORTATION ASSOCIATION OF AMERICA



Gorge TransLink Coordination Project

FINAL REPORT – JANUARY 2008



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Background/Introduction

This transportation coordination planning project is sponsored by the Community Transportation Association of America (CTAA) on behalf of Gorge TransLink. Gorge TransLink is an informal alliance of regional public transportation providers, Medicaid transportation brokers, human service and public planning agencies seeking to enhance connectivity and develop a seamless transportation network within a five-county area bordering the Columbia River in Oregon and Washington State. These include Skamania and Klickitat Counties in Washington State, and Hood River, Wasco and Sherman Counties in Oregon State.

Other participants, at various times, have included Washington and Oregon Departments of Transportation (DOT), Greyhound, and a local charter service provider. In addition, the Mid-Columbia Economic Development District (MCEDD) agreed to facilitate these meetings and has played an active role in ensuring the group's success. MCEDD is legally authorized to conduct its business in both Washington and Oregon, and is comprised of a governing body with members from five counties in two states.

Efforts to coordinate and collaborate began when participants began meeting in 2001; prior to that, very little coordination or direct communication had occurred amongst the providers. Since then, TransLink partners have taken significant steps – both individually and collectively – to improve the coordination of available services, to facilitate access to out-of-county and out-of-state destinations, and to enhance overall connectedness throughout the region. This report documents those efforts, and suggests next steps to advance the seamless transportation alliance that participants envision.

The report is organized as follows:

- Introductory information and documentation of Gorge TransLink's vision, goals and objectives
- Background information about the service area, and a description of existing transportation services
- Proposed interagency guidelines for Gorge TransLink partners to make use of consistent service policies when a customer transfers from one system to another
- Opportunities to enhance vanpool programs
- Establishing a Lead Agency and Mobility Management approach
- Recommended next steps

Gorge TransLink Vision

The long term vision for Gorge TransLink is to coordinate transportation services while retaining the individual identity of each service provider. The partners intend to maintain the unique characteristics of their programs and to operate autonomously. At the same

time, they recognize the benefits of pursuing a regional approach to offer better customer service. For example, they perceive benefits in:

- Establishing a regional information line so that customers in the Columbia River Gorge area have a single point of contact to receive information about transportation services and programs
- Adopting common procedures and policies for use when a customer transfers from one system to another
- Establishing a common fare structure for inter-jurisdictional trips
- Utilization of common marketing materials

Previous Related Planning Efforts

Since Gorge TransLink's inception in 2001, several planning studies have helped stakeholders clarify their coordination goals. These include:

- *Travel Needs and Coordination Strategies in the Mid-Columbia Region*, completed by FLT Consulting, Inc. in 2004
- *Gorge TransLink Transit Marketing Plan*, completed by FLT Consulting, Inc. in 2004
- *Coordinated Public Transit-Human Services Transportation Plans* as required by federal legislation for the use of certain federal transportation fund sources, prepared in 2007, and
- *Coordinated Transportation Plan: Gorge TransLink*, prepared in June 2007 by MCEDD

Key findings emerging from these studies are discussed below.

Travel Needs and Coordination Strategies in the Mid-Columbia Region

Gorge TransLink, through MCEDD, obtained consultant assistance in 2003 to help the group conduct research and make recommendations about how they might develop and implement a more coordinated regional transportation system. That report, *Travel Needs and Coordination Strategies in the Mid-Columbia Region* examined unmet service needs and travel demand patterns, and outlined some short-term and long-term coordination implementation strategies. One of the key recommendations that grew out of the planning study was to formalize the stakeholder group in order to provide continuity and staffing resources to carry out various efforts that to date have been managed on an "ad hoc" basis.

Gorge TransLink Transit Marketing Plan

This report was prepared in concert with the *Travel Needs and Coordination Strategies* report, and focused on identifying current and future customer bases for Gorge TransLink partners. It concluded by identifying a number of marketing or public information strategies and tools for use by consortium members.

As a result of this project, a Gorge TransLink website was launched, and a logo and other marketing materials were developed for common use among the providers.

SAFETEA-LU Coordinated Public Transit Human Services Transportation Plans

In 2005, the Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users, commonly referred to as SAFETEA-LU, was signed into law. Starting in Fiscal Year 2007, projects funded through three federal programs included in SAFETEA-LU, including the Job Access and Reverse Commute Program (JARC, Section 5316), New Freedom (Section 5317) and the Formula Program for Elderly Individuals and Individuals with Disabilities (Section 5310) are required to be derived from a locally developed, coordinated public transit-human services transportation plan. These three funding programs focus on the needs of transportation disadvantaged persons, or those with special transportation needs that cannot be met through traditional means (access to automobile or public transportation).

The Southwest Washington Regional Transportation Council (RTC) prepared the plan on behalf of Skamania, and Klickitat Counties,¹ and MCEDD prepared countywide plans on behalf of Hood River, Wasco and Sherman Counties. The plans assess the availability of current transportation services for persons with disabilities, older adults, and those of low-income status, and identify unmet needs specific to those population groups as well as corresponding strategies to address those needs.

SAFETEA-LU funds available for specific projects are awarded by the state Departments of Transportation (DOT) through a competitive process administered by the DOTs. Oregon and Washington follow a similar biennial grant funding cycle. The next such cycle will begin with solicitation of projects in the fall of 2008, projects selected in early 2009, with grant funds available beginning July 1, 2009.

Coordinated Transportation Plan, Gorge TransLink

This plan was prepared by MCEDD in June 2007, and resulted in the compilation of demographic and other information that had been prepared for the respective SAFETEA-LU plans for Skamania, Klickitat, Sherman, Wasco and Hood River Counties.

The report concluded by identifying a series of goals for Gorge TransLink, including:

- Sustain existing services
- Market Gorge TransLink
- Increase connectivity between counties
- Encourage employer vanpools and rideshare options
- Develop common fare structure
- Formalize Gorge TransLink

¹ The Plan also included Clark County.

Existing Services

This section of the report describes existing transportation services for each local provider, with an emphasis on identifying the extent to which inter-jurisdictional trips occur; that is, the need to travel from one county into another. This baseline information is important to consider when developing consistent guidelines for operators to adopt with respect to delivering these inter-jurisdictional trips. For customers whose trips may involve a transfer from one operator to another, inconsistent policies can be confusing, discouraging and inconvenient. A goal, then, is for customers to experience a “seamless” trip, even if it involves more than one carrier.

A brief description of the service providers is included below:

Skamania County Transportation

Skamania County Senior Services provides demand response within Skamania County, and it provides inter-county service into Klickitat, Hood River and Wasco Counties. Service is also provided into Clark County (Vancouver) and Portland. Slightly more than half (54%) of the trips are provided within the county; the remainder are provided outside the county. Trips are provided within 50 miles of the Skamania County border on a first come first serve basis.

Trips are provided to the general public, and currently no transfers are involved. If Skamania County takes a passenger into a neighboring county, they will also make arrangements to return them, and will take them to their destination within that county.

The agency operates a total of 8 vehicles. They do not currently have the ability to directly communicate via cell phone or radio to other dispatchers or drivers from other programs.

Trip requests can be made a month in advance, and within 2 days of the day the trip is needed, although efforts will be made to accommodate a trip with a shorter window. There is no fare, though donations are accepted. Very few trips are denied, with the exception of some employment or other subscription-based trips, where service needs to be guaranteed on a daily basis.

During the months of January-March 2007, one-way trips were provided as follows:

	# trips	% of total
Skamania-Clark County or Portland/return	560	16%
Skamania-Hood River/return	812	23%
Skamania-White Salmon/return	194	6%
Skamania-The Dalles/return	46	1%
Intra-county Skamania	1888	54%
Total	3500	100%

In addition, Skamania County Transportation provides a deviated fixed route service between Skamania County and Clark County three times a day Monday through Friday. This service averages 1200 trips per month. This service is for the general public.

Klickitat County:

Mount Adams Transportation Service (MATS)

MATS provides most of its trips (64%) within Klickitat County, but it also provides trips to Hood River and Wasco Counties. They occasionally provide service into Skamania County and not into Sherman County. Similar to Skamania, they also provide return trips and do not drop people off to transfer, or have reciprocal agreements with neighboring counties. Trips within Klickitat County primarily originate in either White Salmon or Goldendale. Trips are provided every day from White Salmon to Hood River, and from White Salmon to Odell, the site of a sheltered workshop for developmentally disabled people. Trips for the month of April, 2007 were provided as follows:

	# trips	% of total
Klickitat-Hood River/return	526	20%
Klickitat-Wasco/return	272	10%
Klickitat-Portland/Vancouver or Yakima	175	6%
Intra-county Klickitat/return	1715	64%
Total	2688	100%

Service is available to the general public. Although transfers are not currently taking place, there are designated transfer sites that could be further developed should they be used more. These include transit centers in The Dalles and Hood River, and a designated place for transfers in Stevenson.

Trip requests are accepted up to two months ahead of time, and are cut off at 11:00 a.m. the day before the trip is needed.

Hood River Columbia Area Transit (CAT)

CAT provides relatively little inter-county service as compared to providers in Skamania and Klickitat Counties. This is primarily because key shopping and medical destinations are located in Hood River and/or Wasco Counties, and there is more demand to come into those counties than to neighboring counties on the Washington side of the Columbia River.

Currently, CAT makes a few trips into White Salmon. A large employer has recently relocated to Bingen, with much of its work force living in Hood River. There may be opportunities to provide employment-related transportation from Hood River to Bingen, though the feasibility is yet to be fully explored. CAT also provides some trips to Wasco County, notably to a school in Mosier, which is only five miles from Hood River.

CAT recently received an ODOT grant to provide regularly scheduled service from Hood River to Wasco twice per day. That service is primarily focused on bringing persons from The Dalles into employment opportunities located within Hood River. Designated pick-up and drop-off spots have been identified for use in both Hood River and The Dalles.

	# trips per month	% of total
Hood River-Klickitat		<1%
Hood River-Wasco		<1%
Intra-County Hood River		99%
Total	2000	100%

Trip requests are accepted from a month in advance up to 3:00 p.m. the day before the trip. CAT's ridership is roughly 80% elderly and disabled, and 20% general public. A variety of funding sources support CAT's operating budget, including federal Section 5311 funds, ODOT STF formula and supplemental funds, local property and payroll tax, fares, and other miscellaneous sources.

Wasco County

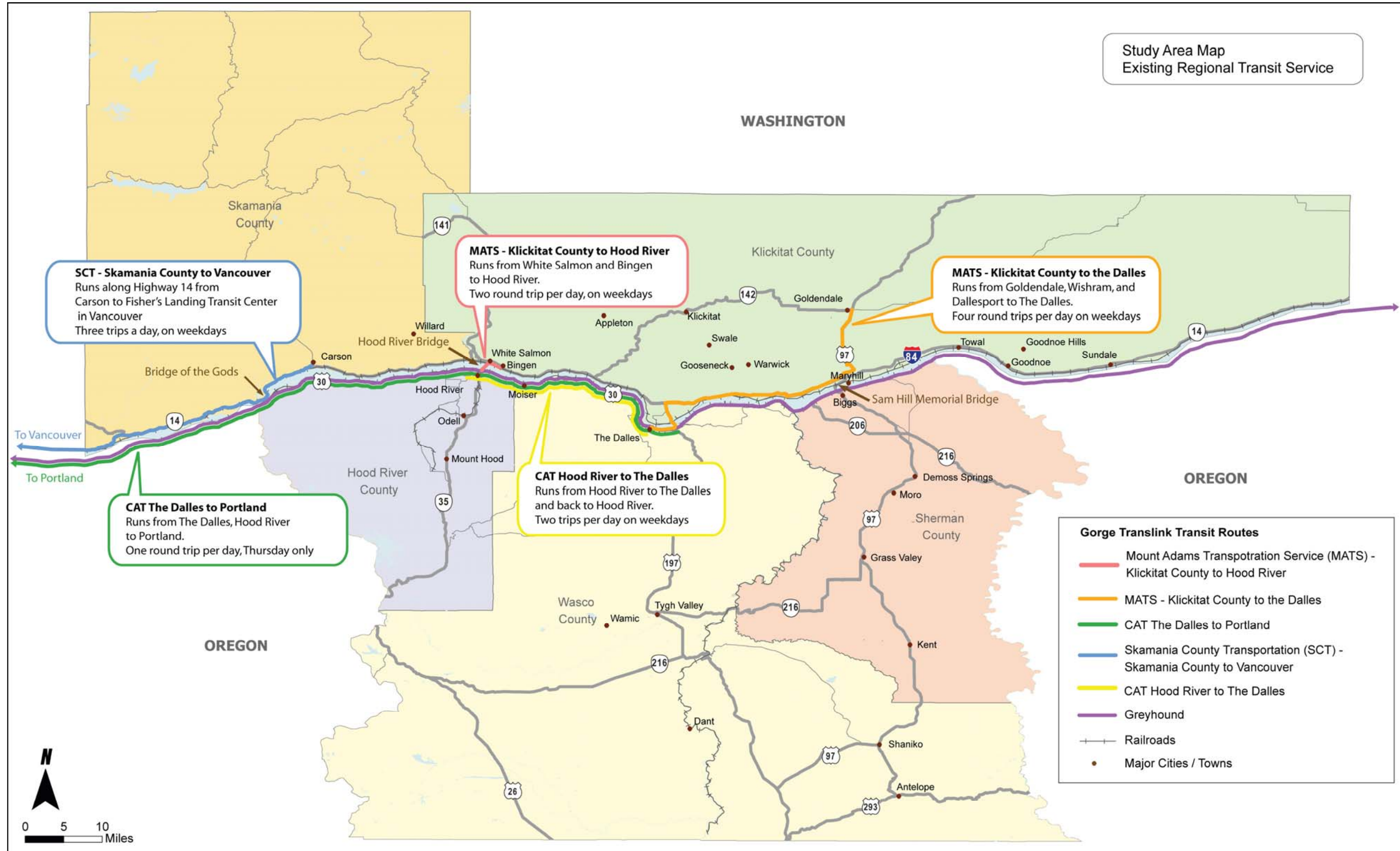
Wasco County Transportation Network is part of the Mid-Columbia Council of Governments, and is not its own district. The program is overseen through a contractual arrangement by CAT staff. The program has limits on local funds that can be used as match. Few trips are provided outside the county, with the exception of some trips to the Columbia Gorge Center (sheltered workshop) located in Odell, inside Hood River County.

Summary/Key Findings

While each of the providers currently travels beyond its county borders, most inter-jurisdictional travel is from Washington into Oregon, where there are more extensive medical and shopping facilities available than in Klickitat or Skamania Counties.

- Nearly half (46%) of Skamania Senior Services trips are outside the county
- Skamania Senior Services considers its "boundaries" as 50 miles outside the county border
- Skamania Transportation travels to Hood River (Hood River County), The Dalles (Wasco County) and Vancouver (Clark County)
- About 36% of MATS trips are outside the county
- MATS travels to Yakima, Hood River, The Dalles, Portland and Vancouver
- There is very little inter-county service between Skamania and Klickitat Counties
- CAT offers fixed route service into The Dalles and Portland; otherwise, very little inter-county service is provided into Washington
- Currently, no transfers are taking place, meaning that the service provider takes the passenger where they need to go, and picks them up, even if in a neighboring county

Study Area Map



Interagency Guidelines

As mentioned in the previous section, Gorge TransLink providers currently do not arrange for transfers, nor are reciprocal fare arrangements in place. Long term goals for the region, however, call for expanded fixed routes from Hood River into The Dalles and Portland. Skamania County Services also currently provides deviated fixed-route service into Vancouver.

Such routes, when offered on a predictable schedule and route, are likely to encourage riders from a regional base, rather than specific to any one county. In anticipation of these potential services, the TransLink partners discussed and agreed upon, in principle, interagency guidelines to help ensure consistency in delivering services.

These regional guidelines are intended to improve connections for both passengers and providers of public transit services within the five counties of the Gorge TransLink service network. They were developed on the specific premise that deviated fixed-route service will be operated by Hood River Columbia Area Transit (CAT) between Hood River and The Dalles, and between Hood River and Portland. They are intended as a regional protocol for how the system will operate as well as to specify the responsibilities of passengers and providers to assure an efficient, user-friendly system.

An implementation plan will consist of both short-term and long-term strategies. Those activities that can be implemented without significant additional funding or policy review will be identified as “short-term,” while “long-term” strategies are those that will require additional planning, funding, or policy support.

Proposed Interagency Guidelines

1. Transfer locations will be identified which, to the extent possible, otherwise serve as public meeting places such as transit centers, multi-modal facilities (i.e., park and ride), etc. Operators will seek to establish clearly designated transfer locations which are clean, safe, sheltered and well-lit with telephones and restrooms nearby.
2. To the extent possible, operators connecting to each other will coordinate their schedules to allow for transfers to occur.
3. Operators will communicate with each other to confirm a transfer needs to occur. This communication could take place via dispatcher-to-dispatcher, or driver-to-driver.²
4. Passengers are expected to be capable of transferring between connecting providers, including waiting without assistance for a connecting vehicle at a transfer location. If unable to wait or transfer without assistance, the passenger is advised to travel with a personal care attendant or companion.
5. A consistent fare policy will be developed and used by all participating operators for inter-jurisdictional trips. For passengers needing to transfer from one system to another, a base fare (amount yet to be determined) will be charged, and a transfer issued for use on the other service.³
6. TransLink members support the development of a universal fare instrument (i.e., regional transit pass, “smart card”, etc.) that would be recognized and used by all operators
7. Transit operators will make available customer information on how to access and use interagency services. This information will be widely posted on websites, on vehicles, issued through press releases, etc.

² A long-term goal for Gorge TransLink partners is to utilize compatible communications equipment so they can communicate directly with each other, rather than through a dispatcher. To date, difficulties with technology and lack of funding have prevented them from further pursuing this goal.

³ Gorge TransLink partners would also like to explore the feasibility of having the toll across the Hood River Bridge waived for public transit vehicles.

Vanpool Opportunities for Gorge TransLink Area

This section of the report provides introductory information regarding the potential to enhance vanpool efforts in the mid-Columbia River Gorge area, as this topic is of interest to MCEDD and the other stakeholders.

Basic vanpool characteristics are described, along with various organizational types, the potential benefits to employers and employees, and vanpool subsidies.

Appendix A to this report reviews relevant peer models and describes the experience of those vanpool sponsors, and highlights those features that make vanpools successful. Finally, an overview is provided of opportunities for promoting vanpooling in the mid-Columbia River Gorge area. As the Gorge TransLink is a bi-state organization, comprised of Washington and Oregon counties, vanpool opportunities from both states are presented.

Demand for Vanpooling

To date, a comprehensive assessment of vanpooling needs has not been conducted for the mid-Columbia River Gorge area. Preliminary discussions among Gorge TransLink members and others⁴ identified the following corridors that could use improved transportation:

- Hood River to the Dalles
- Bingen to White Salmon, Hood River and the Dalles
- Klickitat County into Goldendale and out to Yakima, the Dalles, and Hood River
- Odell/Parkdale area into larger cities

In addition, MCEDD reported significant predicted job growth in the Columbia Gorge Area, including high tech and wind power sectors.

It is possible that vanpooling may be a more suitable solution to these transportation needs than fixed-route service. Before establishing a vanpool program, it will be necessary to assess the current and projected vanpooling needs of the mid-Columbia River Gorge area. As Lead Agency, MCEDD should conduct this research and perform outreach to employers. This would allow for a consistent and coordinated message when working with employers to explore the feasibility of establishing new vanpools.

⁴ Intercity Transportation Meeting, convened January 17, 2007

Vanpool Characteristics

Typically, a vanpool is defined as a group of five to 15 passengers who share their commute. Vanpools travel from home (or a prearranged collection point) to work, school, or other destinations.

Organizational types

Vanpool programs can be administered in a variety of ways, including:

- **Employer-sponsored vanpool programs**, where the employer purchases or leases vans for employee use and often subsidizes the cost.
- **Third-party vanpool programs**, where organizations such as non-profit corporations, for-profit companies or public transit agencies own the vans and provide the administrative duties associated with fleet management. The third-party organization enters into agreements with riders or with their employers. Passengers are charged a fare to cover vehicle cost, maintenance, fuel, insurance and provider overhead.
- **Owner-operator vanpools** can be viewed as “big carpools,” where an individual owns or leases a van, assumes all financial risks, and has complete control except for requirements imposed by some regulatory commissions.

Vanpool benefits

Vanpools may benefit both employers and employees in the following ways:

Employees benefit from vanpools by:

- Saving money
- Reducing wear and tear on personal vehicles
- Avoiding the stress associated with driving and congestion
- Making commuting time more productive by reading or catching up on work
- Arriving to work earlier if HOV lanes are provided in congested corridors
- Taking a job at a worksite when a car is not available
- Commuting more safely
- Vanpools benefit employers by:
 - Reducing the need for additional parking
 - Increasing access to labor markets
 - Enhancing employee benefits packages (e.g. tax-free commuter subsidies)
 - Increasing employee retention and aiding in recruitment
 - Increasing productivity, reduces absenteeism and tardiness
 - Facilitating compliance with any required trip reduction or air quality program

Subsidies

Vanpool sponsors and employers may subsidize vanpool costs to increase participation in vanpool programs in the following ways:

- **Direct contribution toward vanpool fares** where employer assists with paying for vanpool expenses.
- **Tax-free commuter benefits** reduce employees' vanpool cost. They are administered through third party administrators such as WageWorks and Commuter Check which process payroll deductions with an employer and procure vanpool or transit passes in an employee's name. (employer only)
- **Guaranteed ride home** provides commuters with a free reliable ride home when an unexpected event requires that they return home early.
- **Filling vacant seats:** An employer or third-party provider can assist in filling vacated seats.

Existing Vanpool Programs in Columbia Gorge Area

Several vanpools currently operate within the Gorge TransLink service area. These include:

- **Army Corps of Engineers vanpool:** There are three vanpools serving the Army Corps of Engineers John Day Dam in Rufus. They begin in different locations, including: Goldendale, The Dalles, and Hood River. It is operated by VPSI, a local private vanpool provider.
- **Hood River-Lloyd District, Portland:** A vanpool operates between Hood River and the Lloyd District. It is organized through Metro, Portland's regional governmental organization, and operated by Enterprise Van, a private operator.
- **Google shuttles:** Google subsidizes two vanpools that bring employees to its facility in The Dalles. One begins in Beaverton and the other in Hood River.

Washington Vanpool Resources

Washington State has 2,143 active vanpools. The success of vanpool programs in Washington can, in part, be attributed to supportive state legislation, which has encouraged vanpooling in the following ways:

- In 2003, a 10-year \$30-million vanpool program was passed, to subsidize the vanpool purchases, which has been expanded in recent years due to high demand.
- Vanpool vehicles have ride-share license plates, which are cheaper than regular plates.
- No sales tax is charged on the purchase of vanpool vehicles.
- Legislation was passed that specifically states that employers are not liable for employees while they are riding in vanpools.

The Vanpool Investment Program (VIP), operated by WSDOT, provides technical support and funding for vanpool programs based in Washington. VIP has been successful in

supporting new vanpool programs and expanding the scope of existing programs in Washington.

The manager of Statewide Vanpool Programs at WSDOT's Commute Options Office (VIP manager) oversees the VIP program⁵. Vanpool applicants must be an established transit agency in order to receive funding and support under VIP. This means that a Public Transportation Benefit Area (PTBA) must be established by a local vote. The VIP manager cited the experience of Columbia County Public Transportation—which was established in four months for the purpose of operating vanpools—when stressing the ease with which a new transit agency could be established.

Eligible vanpool programs must operate within Washington State or between Washington and Oregon. Eligibility requirements stipulate that trips must begin or end in Washington. Program participants must be based in Washington State.

The VIP provides funding as well technical support to eligible participants:

- **Vehicles:** VIP will reimburse the cost of purchasing an expansion vehicle, which will be used to establish new or expanded vanpool service. VIP cannot pay for replacement vehicles for existing vanpools. There is no specified cap on the number of vehicles that can be purchased via the VIP program.
- **Technical support:** The VIP manager works closely with new vanpool programs to ensure fast initiation and finds creative ways to overcome obstacles to vanpooling.
- **Training:** New vanpool program coordinators are sent to a training session offered by Ben Franklin Transit.
- **Insurance:** Vehicle insurance is provided by the Washington State Transit Insurance Program (WSTIP).

The VIP program requires that participants:

- Attend training with Ben Franklin Transit (the public transit operator for Benton and Franklin Counties), which has experience managing a vanpool program
- Purchase vehicles using an approved Request for Proposals
- Invoice VIP for cost of vehicle expenses
- Must provide a 25% match (vanpool programs have five years to meet the match)
- Submit quarterly performance reports and an annual report to VIP
- Get vanpools on the road within two years of obtaining vans
- There is no formal application process for VIP. Interested parties should call the VIP manager to express interest and to discuss plans for establishing a new program.

⁵ The Statewide Vanpool Program Manager is Chris Simmons, and he can be contacted at 360-705-7917 or simmonsc@wsdot.wa.gov.

Oregon Vanpool Resources

The Oregon vanpool model differs from Washington in that vehicles are typically leased from private providers rather than purchased. Under this model, much of the vanpool administration and maintenance is handled by the private provider. Private vanpool companies offer not only the leased vehicles, but they also provide vehicle insurance and spare/back up vehicles, qualify driver candidates, and assist with route selection.

Oregon's legislature has not created strong incentives for vanpooling as has been done in Washington. There are few subsidies for purchasing vehicles and limited supportive legislation.

In Oregon, a range of local entities administer vanpool programs, including transit agencies, non-profit organizations, and transportation demand management programs. Metro Vanpool, operated by Metro's Commute Options Department, subsidizes vanpooling in the Portland Metropolitan Region and Southern Washington using federal funding⁶. Metro Vanpool subsidizes vanpooling by paying half of the "lowest bid" leased vehicle cost (not including fuel). The remaining vanpool costs are divided amongst vanpool participants.

Metro has lease agreements with the following private vanpool providers: Enterprise, Flexcar, and VPSI, Inc.

Under the Metro Vanpool program, vanpools must maintain a minimum of five participants, including the driver, three or more days a week. The program stipulates that vanpools must end their trips in the Portland Metropolitan Region or Clark County in Southern Washington. For example, a vanpool could be established to transport commuters from Hood River to Portland or to Vancouver, Washington, but not for a vanpool between Hood River and The Dalles.

Metro Vanpool provides an "emergency ride home" for vanpool riders who must return home due to an unexpected family emergency. Local cab companies provide the transportation.

⁶ Metro Vanpool receives ODOT discretionary funds (described later in the report) and Congestion Management Air Quality (CMAQ) funds. The discretionary funds support a new vanpool program for only two years, after which the program must be self-sufficient or secure additional funds.

Establishing New Vanpool Programs

There are a variety of vanpool resources available to support vanpooling in the Columbia River Gorge area. The following summarizes findings about vanpool options.

Metro Vanpool is an excellent existing resource for creating new vanpools that carry commuters from the Gorge area to the Portland Metropolitan Area. Metro Vanpool recommends that the following steps be taken to establish new vanpools under its program:

- Identify a group of people who have commute trips with similar origins and destinations [www.CarpoolMatchNW.org assists local commuters with making vanpool and carpool connections]
- Confirm that vanpool route qualifies for a Metro Vanpool incentive
- Register vanpool with Metro Vanpool.

The program does *not* support vanpools that:

- Travel to the Gorge area, even from Portland or Clark county
- Provide trips within the Gorge area, e.g., from White Salmon to the Dalles

For vanpools traveling to and within the Gorge area, a new vanpool program would need to be established as there is no current program to support these services. It will be easier to establish new vanpool programs in Washington, given the extensive resources available through the Vanpool Investment Program and the Washington State Transportation Insurance Program. The manager of the Vanpool Investment Program should be contacted to discuss vanpooling opportunities as the program seeks to find creative ways to start vanpool programs.

Oregon Department of Transportation (ODOT) supports new vanpool programs with discretionary grants from the Federal Highway Administration⁷. Grant recipients for the current cycle, which have already been identified, have one year to establish a vanpool program.

It is possible that unused funds could be reallocated to new vanpool programs if current grant recipients cannot demonstrate that the funds will be used within a year. The status of these unused funds will be known in spring 2008. The manager of ODOT's Public Transit Division⁸ suggested that any unused funds could potentially be used to procure vehicles if sufficient demand was demonstrated. Funding must be administered through an established transportation demand management program, which could be a city agency or

⁷ The FHWA funds come from the Surface Transportation Program.

⁸ The current manager, Matthew Barnes, will no longer be in the position as of January 2008. Contact the ODOT Public Transit Division to determine who is serving as the new manager. Matthew Barnes suggests contacting the office once an interest in establishing a new vanpooling program has been established.

non-profit organization. Funds can be given to an entity in Oregon or Washington, as long as it can be proven that the vanpooling serves Oregon residents.

Establishing a new vanpool program on the Oregon side of the Gorge will be more difficult as there are few available subsidies. ODOT does distribute discretionary grants on a competitive basis, but its support is limited to two years, during which the new program must seek alternate funding sources. As CMAQ funds tend to be distributed to metropolitan areas, this is not a viable resource for the Columbia Gorge area.

Once established, a new vanpool program will need to determine if vehicles will be purchased or leased. If an Oregon-based program decides to purchase vanpools, it will require the following:

- An administering organization to oversee vehicle procurement, maintenance, driver certification, etc.
- An affordable vehicle insurance plan; Oregon does not have a state-wide program such as the Washington State Transportation Insurance Program
- That employers' liability concerns be addressed

As stated previously, it will be necessary to assess the current and projected vanpooling needs of the area before establishing a new program. This research may determine which funding sources and program arrangements are most suitable for a new program.

Mobility Management

The goal of formalizing Gorge TransLink reinforces recommendations emerging from previous planning studies. In particular, this goal speaks to the need that “Gorge TransLink should become a more formalized group, specifically seeking a mobility manager to help accomplish the increasing need for providing regional transportation by making connections to individual providers in the five counties.”⁹

The purpose of establishing a mobility management approach is to ensure the organizational structure is in place to implement and advance coordination activities and goals as identified by the stakeholder group. Lacking this arrangement, the group has relied on intermittent consultant assistance, and has not been able to take advantage of consistent or permanent staffing assistance. As a first step, a lead agency is needed to serve as facilitator of meetings and as fiscal agent to apply for and receive grant funds to support the group’s activities.

Through this planning study, Gorge TransLink members discussed the roles and responsibilities inherent in designating a Lead Agency, and the extent to which the Lead Agency would promote a broader “Mobility Management” approach on behalf of the group. The results of these discussions are summarized below.

Lead Agency Roles and Responsibilities

A lead agency should be:

- committed to enhancing regional coordination goals and integrating the transportation services of member provider agencies without overshadowing individual identities;
- willing to provide legal, policy and administrative support as needed;
- capable of identifying available funding resources and serving as a conduit for funds on behalf of member agencies;
- prepared to be a mobility advocate with individual jurisdictions within the Gorge region, and at the state and national levels; and
- able to assess regional mobility needs and develop regional transportation plans on an on-going basis.

The specific roles and responsibilities of the lead agency can be as broad or narrow as the group decides and funding opportunities allow. They can also be updated, expanded or revised at any time. The following are some illustrative examples, for purposes of discussion, of the primary administrative and programmatic activities that might be undertaken:

⁹ Coordinated Transportation Plan, *Gorge TransLink*, June 2007, page 23

Administrative

- Research funding availability, and serve as the legal sponsor (i.e. grant recipient) for consortium members when needed
- Dedicate or hire a mobility manager of TransLink coordination activities
- Facilitate TransLink meetings, including preparing meeting materials
- Prepare an annual work plan to identify and prioritize future coordination strategies
- Identify additional stakeholders and opportunities to expand membership within the region

Programmatic

- Assume responsibility for on-going regional transit needs assessment and coordinated mobility planning
- Maintain and keep current the Gorge TransLink website and other informational materials available to the public
- Develop “One-Stop” travel information and trip planning program
- Develop seamless communication system between all community partners, including centralized dispatch and scheduling system relying on single point of access model
- Assess feasibility of adopting additional technologies, including the use of universal fare instruments, mobile data terminals, vehicle locating devices, integrated software packages and other technology applications that may enhance the accessibility, coordination or provision of transit services
- Assume a lead role to further investigate and help sponsor enhanced vanpool or other alternative transportation programs
- Work with and recruit participation from additional regional stakeholders, including human services agencies, employers and private sector providers
- Increase awareness and support of transportation options throughout the region
- Lead efforts to inform elected officials and other policy makers about local services, and the need to enhance and improve regional transportation connections

This Mobility Management Implementation Plan is based on the premise that MCEDD will serve as Lead Agency, a concept that is supported by Gorge TransLink members. MCEDD is a regional planning organization in the unique position of providing services in both states, and with the institutional and technical capacity to support Gorge TransLink activities.

Next Steps: Immediate, Short-Term and Long-Term Strategies

Immediate Strategies
<ul style="list-style-type: none"> ● Develop and execute Memorandum of Understanding for participants to formally designate MCEDD as Lead Agency, and to confirm their participation in TransLink ● Convene facilitated working session for TransLink partners to further define lead agency's roles and responsibilities ● Develop budget and funding strategy to support mobility management strategies ● Develop Year One Implementation Plan, consistent with identified Gorge TransLink coordination goals and objectives ● Ensure existing SAFETEA-LU plans identify mobility management as a viable strategy to advance coordination ● Develop and distribute fact sheets or other educational materials to inform local partners of regional transportation needs and issues
Short-Term Strategies
<ul style="list-style-type: none"> ● Seek funding to support mobility management plan (Fall 2008) ● If funding allows, hire lead agency staff ● Prioritize Implementation Plan activities, establish specific action steps needed to carry them out ● Determine the level of demand for vanpooling and perform outreach to area employers
Long-Term Strategies
<ul style="list-style-type: none"> ● Conduct evaluation of Lead Agency activities ● Implement key coordination activities as identified by partners ● Seek ongoing and consistent funding support for lead agency

Funding the Mobility Manager

New opportunities exist within SAFETEA-LU to pursue the use of federal funds to support up to 80% of mobility management costs.¹⁰ The remaining 20% must come from other local sources of funds. Federal guidelines specify that: "All of the local share must be provided from sources other than federal DOT funds. Some examples of local match which may be used for any or all of the local share include: State or local appropriations; other non-DOT federal funds; dedicated tax revenues; private donations; revenue from human service contracts; toll revenue credits; and net income generated from advertising and concessions. Non-cash share such as donations, volunteer services, or in-kind contributions is eligible to be counted toward the local match as long as the value of each is documented and supported, represents a cost which would otherwise be eligible under the program, and is included in the net project costs in the project budget."

In Oregon, ODOT is responsible to select projects in non-urbanized areas of the state that compete for these funds. The next opportunity to apply for SAFETEA-LU mobility management funds will most likely be in the fall of 2008, with funding decisions announced in the spring of 2009. The State of Washington follows a similar process and timeline.

An estimated one-year budget mobility management activities, including salary and benefits for one full time staff and associated costs, is \$100,000. Because funding is distributed on a biennial basis, a two-year proposed financial plan is outlined below. It should be noted that, while this budget assumes one full-time staff person over a two-year period of time, the budget could be scaled back should grant funds not be available at this level.

Furthermore, it is important to recognize that local project partners will need to identify and commit to the local source(s) of match prior to submitting the grant. Most likely, a shared contribution from Gorge TransLink partners will be sought to cover the match requirement.

At this time, given current funding constrictions, no other viable option for funding the Mobility Manager has been identified.

¹⁰ Mobility Management activities are considered "capital" expenses, and require a lower match than do operating projects. A 20% match is required in Washington, and 11% is required in Oregon.

Proposed Budget: Gorge TransLink Mobility Management

Assumed Funding Source	Amount
ODOT SAFETEA-LU Mobility Management	\$89,000
WSDOT SAFETEA-LU Mobility Management	\$80,000
Oregon local match	\$11,000
Washington local match	\$20,000
Two-year Total	\$200,000

Recommendations and Next Steps

This planning effort is intended to advance transportation coordination activities and programs for Gorge TransLink partners by outlining specific policies, tools or recommendations to pursue. Recommended next steps are as follows:

- Present findings and recommendations to local policy boards:** This recommendation recognizes the need to inform local elected officials, policy board members and others about Gorge TransLink, and to seek their support in appointing a Lead Agency. Such a presentation will allow for these local officials to better understand the role a Lead Agency will play on their behalf.
- Designate MCEDD as Lead Agency:** Gorge TransLink partners endorse the designation of MCEDD as Lead Agency, and should seek support of this designation from their policy boards. To date, MCEDD has served, informally, in this capacity and is well suited to take this leadership role to the next level. MCEDD is uniquely qualified in that it is authorized to conduct business in both Washington and Oregon and, recognizes the role transportation can play in support of its broader mission of promoting economic development for the region. In its capacity as Lead Agency, MCEDD will serve as fiscal agent for the group, meaning they will apply for and administer grant funds on behalf of Gorge TransLink members.
- Execute a Memorandum of Understanding (MOU) between MCEDD and participating Gorge TransLink members:** It would behoove both the Lead Agency and participating members to develop and sign-off on a Memorandum of Understanding that would clarify roles and responsibilities of each. It is not envisioned that the MOU serve as a formal contract involving exchange of funds.
- Authorize MCEDD to seek Mobility Management grant funding:** The funding strategy to support a mobility management approach is contingent upon receipt of SAFETEA-LU mobility management funds, which are awarded on a competitive grant process by the Departments of Washington and Oregon. As a first step, MCEDD should ensure that the respective SAFETEA-LU plans recognize the need for mobility management and identify it as a viable strategy for the region. Then, grants should be submitted to both DOTs when new funding is available.

- **Develop a one-year implementation plan:** Gorge TransLink members are motivated to advance the coordination activities that are currently under development. A one-year implementation plan would provide them with a structure to prioritize and assess the feasibility of implementing these activities, and to assign tasks for carrying them out.
- **Adopt and begin implementation of interagency guidelines:** During the course of this project, Gorge TransLink stakeholders have reviewed and revised the interagency guidelines included as part of this report. This recommendation would serve to formally adopt the guidelines, and to begin work on implementing them. A first step would be to develop short-term and long-term steps needed for implementation.
- **Seek to broaden Gorge TransLink participation:** As mentioned throughout this document, Gorge TransLink members represent an “informal alliance” of stakeholders. While some entities are considered members of TransLink, their participation has been sporadic. The Lead Agency should conduct outreach to these entities to inform them about TransLink’s activities, and to encourage and nurture their participation. This would also be an opportunity to assess whether there are other potential members, and to recruit for additional membership.
- **Develop educational materials and convene meetings with local elected officials:** Gorge TransLink members would like to develop Fact Sheets or other informational materials about their programs to share with local or state elected officials. This would provide an opportunity to inform them about Gorge TransLink, and about the characteristics of their programs of interest to these leaders. For example, information could be developed to document and quantify the anticipated need for services with the aging of the population, and the impact this may have on local programs.

Some fact sheets were prepared for use by project stakeholders as part of this project, and are included as Appendix B to this report.

- **Gauge the demand for vanpooling in the Gorge Translink counties:** This task is a critical first step in enhancing vanpooling options for the Gorge Translink counties. In order to design an effective vanpool program, it is necessary that the need for vanpooling be assessed and that origins and destinations be identified. The Lead Agency should perform this task, which may include conducting outreach to employers in the area and mapping population centers in relation to existing employment sites.

A summary of recommendations, proposed partners, and a timeframe for implementation is indicated below:

Recommendation	Lead Entity	Timeframe
Present Findings and Recommendations	MCEDD, Consultant	January 2008
Designate MCEDD as Lead Agency	MCEDD, Gorge TransLink members	Early 2008
Execute MOU	MCEDD and Gorge TransLink members	Early 2008
Authorize MCEDD to seek grant funding	MCEDD	Summer/Fall 2008 (possibly sooner in Washington)
Develop one-year implementation plan	MCEDD, Gorge TransLink members	Spring 2008
Adopt and implement interagency guidelines	Gorge TransLink members	Spring 2008
Seek to broaden Gorge TransLink participation	MCEDD	Spring-summer 2008
Develop educational materials	MCEDD	Early 2008
Gauge the demand for vanpooling	MCEDD	Spring 2008

APPENDIX A

VANPOOL PEER PROGRAMS

Appendix A. Vanpool Peer Programs

This section presents the experience of several vanpool sponsors that established new vanpool programs. Their experiences may help inform the Gorge Translink's future efforts. The two Washington-based programs, Yakima Transit and Columbia County Public Transportation, established programs where the agencies purchase, insure, and maintain the vehicles. This may be, in part, due to Washington's Vanpool Investment Program¹, which makes vanpool procurement more affordable. Commute Options, a non-profit organization based in Bend, Oregon, coordinates a vanpool program, but uses private vanpool providers, which handle the cost of vehicle procurement, maintenance, insurance, etc.

Yakima Transit (Washington)

In Washington, Yakima Transit established a vanpool program designed for residents with long commutes. Currently, the program has 15 vans in operation and 19 in its fleet, which serve customers in three counties and ten cities.

Vanpool drivers are fellow commuters and are responsible for collecting the monthly vanpool fee and fueling the vehicle. In return, they may ride free or for a reduced price. All vanpools must begin and end in Yakima.

Yakima Transit pays for the vehicle, insurance and maintenance costs. The cost of fuel is included in the monthly fee paid by the user.

Obstacles

Yakima Transit faced some difficulties with insuring vehicles and taking advantage of available funding sources since it is a municipal transit agency administered directly by the city². Many of the established vanpool funding and insurance mechanisms are oriented to independently operated transit systems.

- **Liability:** City staff raised liability concerns, which initially posed an obstacle to program implementation. At first, the city looked to an insurance broker for its insurance coverage; however, ultimately Yakima Transit was able to join the state's insurance pool (WSTIP).
- **Vehicle procurement:** Initially, Yakima Transit had to purchase vans out of its operating budget since, as a municipal transit agency, it could not deal directly with the state. After addressing legal hurdles, they were able to take advantage of the state's Vanpool Investment program.

¹ The Washington State Vanpool Investment Program is a 10-year \$30 million grant program to expand vanpooling statewide. The funds are given to public transit agencies to add vanpools to their fleet and to provide incentives for employers to increase employee vanpool use.

² This is unusual in Washington State, where most transit agencies fall within a Public Transit Benefit District.

Lessons Learned

- **Economic development:** The vanpool coordinator sold vanpooling to the city as a means for promoting local economic development. By establishing a vanpool program to remote work locations, Yakima could retain tax-paying residents who might otherwise move closer to employment sites.
- **Cooperative arrangement with employers:** Yakima Transit worked closely with the Washington Beef Plant's new Human Resources manager to establish a vanpool program. The employer was motivated to establish the program in order to address its problems with employee retention. Yakima Transit provided administrative assistance to establish payroll deduction, translate materials into Spanish, and to subsidize van procurement and driver training.
- **Best practices:** Yakima Transit utilized the Washington State Transit Insurance Pool's *Best Practice Standards for Vanpools* guidelines. It specifies standards for vanpool driver selection, maintenance procedures, and accident/incident reporting.
- **Long-distance worksites:** The vanpools established by Yakima Transit were in part successful due to the long distance between Yakima and the work sites.

Columbia County Public Transportation (Washington)

Columbia County Public Transportation, a small transit operator located in southeastern Washington, administers a small vanpool program with assistance from Washington State's Vanpool Investment Program (VIP).

It has six vans in operation and 11 in the fleet. The program serves customers in three states (Idaho, Washington, and Oregon), six counties, and eight cities/towns. There is one part-time staff person dedicated to operating the program.

VIP stipulates that participants must be transit agencies, which requires the establishment of a Public Transit Benefit Area (PTBA) via a public vote. The state program provided technical assistance to the county, helping them to establish a pilot program that would build support for vanpooling before it went for a vote. Columbia County created a PTBA and transit agency in order to establish a vanpool program.

It took approximately four months to begin the program, which involved the following elements:

- **Borrowed vans:** In order to begin service quickly, the transit agency utilized borrowed vans. Initially, there was no budget to procure new vehicles.
- **Guidance/mentorship:** WSDOT provided guidance and technical support and vanpool mentors provided operational guidelines and advice.
- **Volunteers:** The vanpool program began as a non-profit agency and relied on volunteers. After residents voted to create a county-wide transit authority and PTBA, the program is supported by tax revenue.

Commute Options (Bend, Oregon)

Commute Options, a non-profit organization based in Bend, Oregon, administers the area vanpool program. It spearheaded the vanpool program before a transit system existed in the area. It performs a quasi-governmental role and collaborates closely with the City of Bend and Deschutes County.

Currently, there are six vanpools in operation and an additional six in formation. Commute Options promotes, organizes, and applies for funding for vanpooling. It does not own or manage any vans; instead, it uses private providers such as VPSI and Enterprise.

With discretionary funding, Commute Options is able to reduce the cost of vehicle-related expenses by fifty percent. They also work with employers to receive Business Energy Tax Credits (BETC).

Vanpool Success

Drawing from these cases and others, there are a number of factors that contribute to a vanpool's success:

- **Trip distance:** Long commute distances make vanpools a more attractive option for commuters.
- **Transportation network:** Vanpooling is especially beneficial where there are limited transit options.
- **Job base:** As vanpooling works well when groups of commuters travel to/from proximate locations, the presence of large employers facilitate vanpool creation.
- **Employer support:** Employer support is key to developing a strong vanpooling program as there are a number of employer-based incentives.
- **Promotion:** Many are still not familiar with the concept of vanpooling and do not realize its potential benefits. Promoting the program via advertising, word of mouth, etc. is important for its success.

APPENDIX B

FACT SHEETS

Gorge TransLink Fact Sheet

Your gateway to getting around the Mid-Columbia River Gorge Area



Gorge TransLink is an alliance of transportation providers, human service organizations and public planning agencies seeking to enhance connectivity and develop a seamless transportation network within a five-county area bordering the Columbia River in Oregon and Washington State. These include Skamania and Klickitat counties in Washington State and Hood River, Wasco, and Sherman counties in the State of Oregon.

Since it was established in 2001, **Gorge TransLink** partners have taken significant steps—both individually and collectively—to improve the coordination of available services, to facilitate access to out-of-county and out-of-state destinations, and to enhance overall connectedness throughout the region.

Collectively, **Gorge TransLink** provides public transportation services throughout the Mid-Columbia River Gorge area and to nearby centers such as Portland and Vancouver. Particular attention is given

to enhancing transportation services for those who are seeking alternatives to driving due to age, disability, or income.

Through coordination, **Gorge TransLink** providers deliver transportation services for the region which:

- Deliver an efficient combination of local transportation resources, including non-traditional transportation services.
- Improve the sense of independence and freedom for those who are unable to drive, cannot afford to drive, or who are seeking driving alternatives due to concerns about their safety driving.
- Serve the general public regardless of age, income or health.

Gorge TransLink members and partners include:

- *Transportation providers in Hood River, Sherman, Skamania, Klickitat and Wasco Counties*
- *Representatives of the Medicaid Transportation Brokerages in Washington and Oregon*
- *Mid-Columbia Economic Development District (MCEDD)*
- *Washington DOT*
- *Oregon DOT*
- *Greyhound Lines*
- *Human Services Council*



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Transportation Needs of Older Adults

Your gateway to getting around the Mid-Columbia River Gorge Area

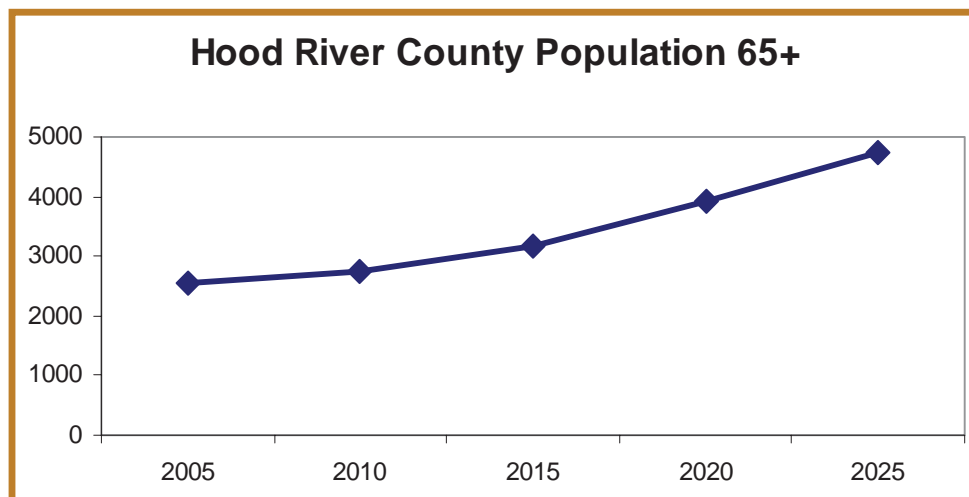


The proportion of the elderly population in rural areas has grown as a consequence of aging in place, the outward flow of the younger population to urban areas, and retiree in-migration. The result is an increase in the population that is less mobile, able to drive or to navigate transportation services.

When people can no longer drive, and family members can't drive them, community-based transportation services may be their only chance of getting where they need to go.

The percentage of senior drivers in a community declines with age. A recent study in the American Journal of Public Health finds that life expectancy is not the same as driving expectancy. In other words, most people will live for a time when they can no longer drive, and are dependent on other means of transportation.

The senior population in Hood River County– like the United States– is increasing rapidly. Between 2005-2025, the population is expected to grow by 85%.



The increasing number of older adults, especially those age 85+, will increase the demand for specialized services and present a challenge to transportation providers.

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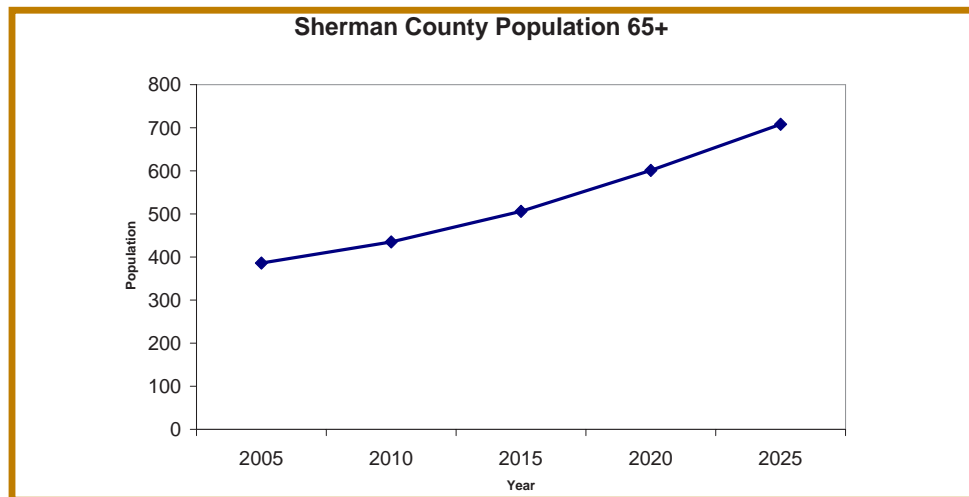


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The senior population in Sherman County— like the United States— is increasing rapidly. Between 2005-2025, the population is expected to grow by 83%.



The increasing number of older adults, especially those age 85+, will increase the demand for specialized services and present a challenge to transportation providers.

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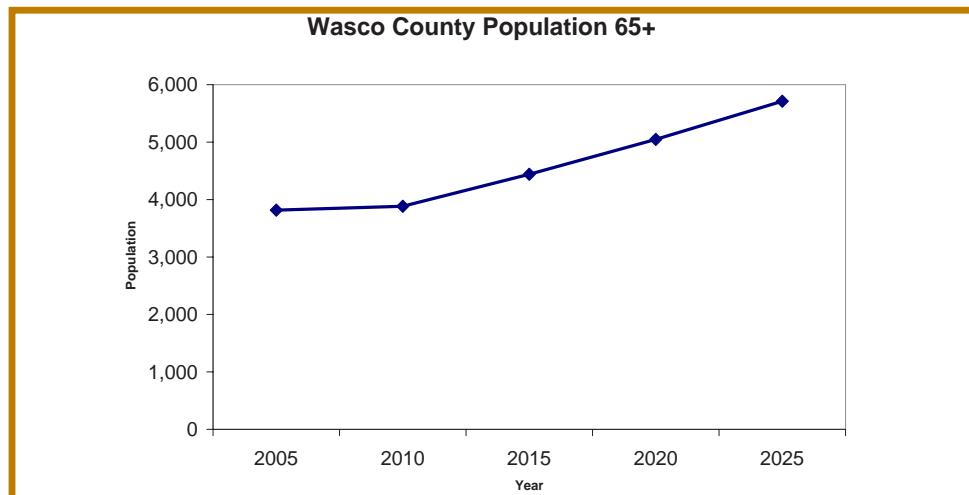


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The percentage of senior drivers in a community declines with age. A recent study in the American Journal of Public Health finds that life expectancy is not the same as driving expectancy. In other words, most people will live for a time when they can no longer drive, and are dependent on other means of transportation.

The senior population in Wasco County— like the United States— is increasing rapidly. Between 2005-2025, the population is expected to grow by 50%.



The increasing number of older adults, especially those age 85+, will increase the demand for specialized services and present a challenge to transportation providers.

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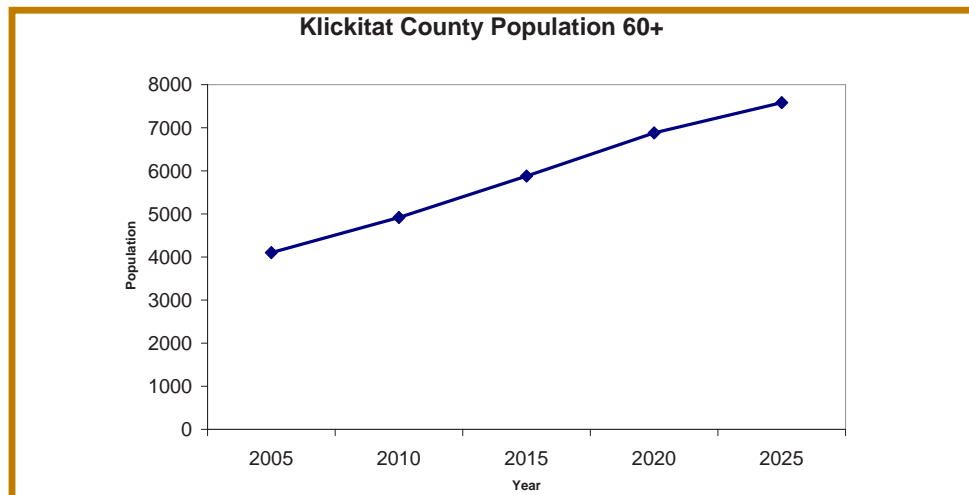


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When people can no longer drive, and family members can't drive them, community-based transportation services may be their only chance of getting where they need to go.

The percentage of senior drivers in a community declines with age. A recent study in the American Journal of Public Health finds that life expectancy is not the same as driving expectancy. In other words, most people will live for a time when they can no longer drive, and are dependent on other means of transportation.

The senior population in Klickitat County—like the United States— is increasing rapidly. Between 2005-2025, the population is expected to grow by 84%.



The increasing number of older adults, especially those age 85+, will increase the demand for specialized services and present a challenge to transportation providers.

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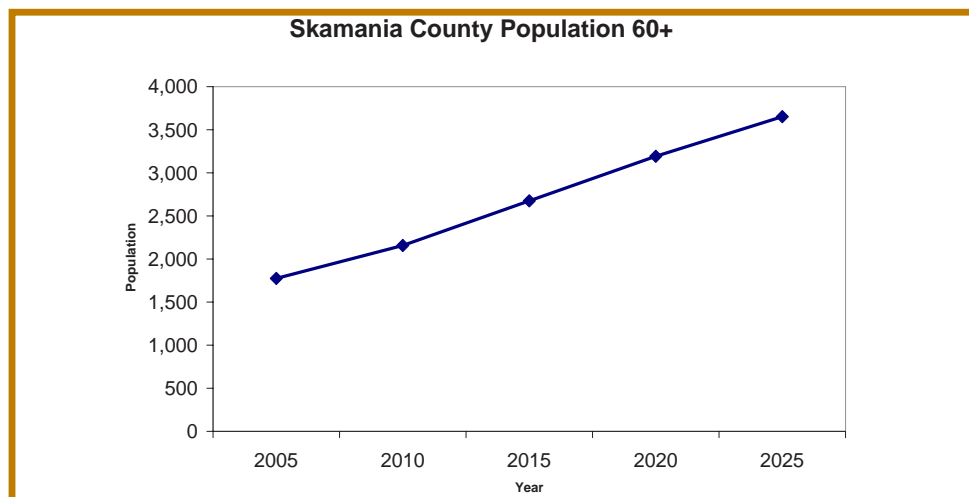


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The percentage of senior drivers in a community declines with age. A recent study in the American Journal of Public Health finds that life expectancy is not the same as driving expectancy. In other words, most people will live for a time when they can no longer drive, and are dependent on other means of transportation.

The senior population in Skamania County— like the United States— is increasing rapidly. Between 2005-2025, the population is expected to double.



The increasing number of older adults, especially those age 85+, will increase the demand for specialized services and present a challenge to transportation providers.

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