

TECHNICAL MEMORANDUM #6

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Project: Gorge Regional Transit Strategy (GRTS) Phase 2

Subject: Key Initiatives

INTRODUCTION

This memorandum focuses on key initiatives for implementation in the 3-year planning horizon. It builds on the decision-making and organizational structures, funding opportunities, and service opportunities presented in Memo #5: Regional Transit Solutions. Next steps, roles and responsibilities, related funding opportunities, constraints, and other factors in implementing key initiatives for short-term action are identified based on conclusions from the Key Initiatives Workshop.

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KEY INITIATIVES WORKSHOP

Kittelson, JLA Public Involvement, and Mid-Columbia Economic Development District (MCEDD) hosted a virtual Key Initiatives Workshop with members of the Gorge TransLink Alliance transit agencies and their respective governing bodies to discuss opportunities and potential initiatives to identify priorities and short-term actions that should be pursued within the next 3 years. Key takeaways are summarized below. Polling responses from the meeting are detailed in Appendix A.

- Participants were interested in a range of key initiatives for the next 1-3 years, including enhancing marketing and education materials, improving transfers, and adding more weekend service along I-84 and SR-14. Participants emphasized that some of the initiatives build on each other, and some cannot be accomplished within 3 years, but it is important to start positioning for those initiatives.
- Participants discussed interest in creating a Transit Advisory Board (TAB) and potential responsibilities and administration of that group.
 - All participants were either interested in or open to forming a TAB.
 - Most participants were also interested in using a TAB to explore options for further regionalization and centralization.
 - Additional information about logistics and administration of a potential TAB are provided in Appendix B.

The following sections in this memo outline action plans for governance, coordination, and customer experience based on the input from the Key Initiatives Workshop.

KEY INITIATIVES

This section and Table 1 below provide an overview of the key initiatives proposed to be included in the Gorge Regional Transit Strategy’s near-term actions.

Table 1. Summary of Key Initiatives

Focus Area	Initiatives
<p>Governance</p>	<ul style="list-style-type: none"> • Form a Transit Advisory Board (TAB) to oversee regional transit matters that impact more than one county and examine the feasibility of creating a central agency or more centralized governance to manage transit programs and service across the five-county region. • Pursue funding opportunities under the TAB.
<p>Regional Coordination/ Infrastructure and Information</p>	<ul style="list-style-type: none"> • Identify key stop locations that support transfers between providers and increase the number of trips that do not require a transfer. • Implement consistent branding of buses and stops and naming conventions for transit routes. • Enhance marketing and education materials to consolidate transit resources and provide a webpage and printable or hardcopy

Focus Area	Initiatives
	brochure where riders can gather information across services on a single page. <ul style="list-style-type: none"> • Coordinate data collection across counties to support applications for grant funding and inform route planning.
Service Enhancement	<ul style="list-style-type: none"> • Expand capacity to provide transit service: identify public and private providers that can support expansion of transit service. • Provide service 7 days/week across the I-84 and SR-14 routes within all counties.

Initiatives identified in Table 1 are described in more detail in the following sections.

Governance Key Initiatives

This section provides a brief overview of governance scenarios examined in detail in Memo 5, describes the importance of creating a transit advisory board (TAB), outlines steps to forming a TAB, and lists steps for pursuing near- and long-term funding opportunities under the TAB.

Scenarios Examined

Memo 5 evaluates the following governance scenarios for improving regional transit decision-making processes:

Scenario 0: Status Quo. Scenario 0 is the baseline to which all other scenarios are compared. The status quo assumes no change to the current Gorge TransLink Alliance, which is governed by separate Memorandums of Understanding (MOUs) between each county and MCEDD. The MOUs designate MCEDD as the lead agency for the Alliance and include only high-level statements indicating each agency’s broad intent to work with MCEDD. Regional communication and cooperation are ad hoc, without a defined decision-making process.

The current Alliance is 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 agency’s governing body for approval.

Scenario 1: Enhanced Status Quo. Multiple existing MOUs would be replaced with a single Memorandum of Understanding (MOU) or Interagency Agreement (IGA) to clarify expectations of all partners and define decision-making protocols in writing. The group would establish membership dues to help 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.

Scenario 2: Regional Transit Advisory Board. A board of elected officials would be convened as a central policy body on regional transit matters. The board would be created with a new MOU or IGA

signed by all partners that would define the board's roles, responsibilities, and decision-making authorities for the regional transit program.

A Regional Transit Advisory Board could serve as a long-term policy-level forum for the region, or it could be used as a springboard to help form a new centralized transit organization for the region with full consensus of all governing bodies, such as a regional cooperative, transportation management organization, or new bi-state governmental agency. (See Scenarios 4 and 5 below.)

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

Scenario 3: New Transportation Districts. Scenario 3 examined new single-county transit districts in Wasco, Klickitat, and Skamania counties, as well as the potential for joint districts covering more than one county. Districting laws differ between states, and current laws do not provide an opportunity to create a single transportation district that would span counties in both Washington and Oregon. As a result, the project team examined the potential for a joint district for Klickitat and Skamania counties on the Washington side, and a joint district for Hood River and Wasco counties on the Oregon side. These options would provide additional revenue generation options for counties that are not currently represented by a transportation district. However, creating additional transportation districts under current statutes would not appreciably change decision-making at the regional level.

Scenario 4: Regional Cooperative or Transportation Management Organization. Scenario 4 would create a regional cooperative business entity (co-op), or a nonprofit 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 five-county region, including 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 agencies. If desired, owner/member opportunities could be made available to others who may benefit from or help 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.

Scenario 5 – New Bi-State Government Agency. Scenarios 1 through 4 are options available to the alliance today, under existing laws. Conversely, the creation of a new bi-state governmental agency is not possible within current legislation and regulations. This scenario would require new state legislation in both Washington and Oregon. A Congressional act may also be required to adequately fund it.

Like the co-op/TMO concept described above, Scenario 5 would establish a new centralized organization to take over regional transit activities, except that instead of a business or nonprofit entity, a *new unit of government* would be created. Under Scenario 5, a new bi-state transit agency would take over all aspects of transit system planning, operation, and management from the existing Gorge TransLink partners.

A potential model for Scenario 5 is the recent Bi-State Bridge Authority legislation enacted by the Washington and Oregon legislatures. In 2022, both state legislatures passed bills to form and charter a new bi-state governmental commission with the authority to manage the construction, maintenance, and operation of bridges across the Columbia River. The development of this legislation was led by an

interagency working group of political leaders in the Mid-Columbia region, including elected officials from the cities of Bingen, White Salmon and Hood River; Klickitat and Hood River counties, and the Port of Hood River.

Refer to Memo 5 for more information on each scenario.

The Case for a TAB

Recommendations from this project include multiple initiatives within the policy realm. An overarching recommendation is to expand governmental capacity to provide transit service. This goal may be accomplished in the near-term through joint contracting between existing agencies or with third-party providers. Over the long-term, there is interest in exploring the creation of a new regional cooperative or bi-state transit authority that may consolidate transit operations across the region under a single service provider. Additional initiatives, such as implementing consistent branding and naming conventions, adopting uniform data standards and reporting processes, and regional marketing programs encroach into the policy arena. As a result, a look is needed at how regional transit decisions should be vetted.

The work of this project highlights an important distinction between the role of elected officials who *should collectively decide policy issues*, and agency staff who are responsible for implementing those policy directions.

While interagency coordination at the staff level will continue to be essential, there is currently no established forum for policymakers to discuss regional transit matters. Greater engagement of, and interaction between, elected officials across the region is needed for appropriate due diligence as future governance options are examined and other Gorge Regional Transit Strategy (GRTS) recommendations are implemented.

Therefore, formation of a TAB is recommended. The current staff-level group should become a Technical Committee to assist the new policy-level board.

Form a TAB

Table 2 describes the recommended process to form a TAB for the Gorge TransLink region using a series of three policymaker work sessions. The existing staff-level coordinating group would have a key role in helping to prepare materials and information for each formational work session and could ultimately be chartered as a technical committee providing regular information and updates for the new board.

Table 2. Steps for Forming a TAB

Step	Description	Responsible Party
Appoint Facilitator	Identify a formational coordinator who will facilitate initial work sessions until the TAB is approved and a TAB Manager is selected.	MCEDD, in consultation with existing staff-level group
Work Session 1 Regional Transit Summit	<p>Invitations: Formal letters inviting counties, Hood River County Transportation District Board, and cities to send elected representatives to a regional transit summit where the question of forming a regional transit advisory board will be discussed. (Governing bodies will use their own processes to appoint a delegate to send to the summit and potentially serve on a TAB.) In addition, invite state departments of transportation (DOTs) to send senior level managers. Consider the MCEDD Board Chair as signatory. Request responses to identify policy-level delegates who will be attending.</p> <p>Notifications: Prepare public educational materials describing the purpose and intent of a TAB for the region as part of a marketing and public information campaign for the TAB. Issue a public notice in advance of the meeting.</p> <p>Room setup: Seat elected officials and DOT delegates in a roundtable or horseshoe configuration, using name cards for policy-level delegates on the table; provide separate audience seating for agency staff and members of the public.</p> <p>Summit Agenda:</p> <ul style="list-style-type: none"> • Present background and recommended key initiatives from the GRTS project • Explain “Why a TAB?” • Discuss proposed TAB structure and representation 	Facilitator
Draft TAB MOU	<p>Prepare a Draft MOU based on Work Session 1 discussions. See Appendix B for a sample MOU.</p> <p>Circulate to parties for review and comment. The MOU would describe how recommendations from the TAB would be ratified by governing bodies and describe what decisions require votes from agency boards to be approved. It would also describe how the TAB will work with transit agencies to align regional recommendations with locally adopted transit plans.</p>	Facilitator

Step	Description	Responsible Party
Final TAB MOU	Finalize MOU and coordinate signatures. Send each party a copy of the fully executed document.	Facilitator
Draft TAB Bylaws	Prepare draft to include with agenda packet for Work Session 2. See Appendix B for sample bylaws.	Facilitator
Draft TAB Biennial Work Plan	Prepare draft to include with agenda packet for Work Session 2. See Appendix B for a sample work plan.	Facilitator
Draft Technical Committee Charter	<p>Prepare draft and circulate to existing staff-level group for review and comment. See Appendix B for a sample charter.</p> <p>Meet with staff-level group to discuss the charter and selected a proposed chair and vice chair for the Technical Committee.</p> <p>Address comments from the staff-level group; prepare a revised draft Technical Committee Charter to include with agenda packet for Work Session 2.</p>	Facilitator
Work Session 2 Initial TAB Meeting	<p>Invitations: Coordinate with TAB delegates from each MOU party to find a date. Email meeting invites.</p> <p>Notifications: Issue a public notice in advance of the meeting.</p> <p>Room Setup: TAB members seated in council style. Audience chairs for staff and others.</p> <p>Agenda:</p> <ul style="list-style-type: none"> • Discuss draft TAB bylaws • Discuss draft TAB work plan • Discuss proposed Technical Committee charter 	Facilitator
Final Draft Bylaws, Work Plan and Technical	<p>Refine draft documents to reflect Work Session 2 discussions and circulate to parties for review and comment.</p> <p>Address comments and circulate final drafts.</p>	Facilitator

Step	Description	Responsible Party
Committee Charter		
<p>Work Session 3</p> <p>TAB Meeting</p>	<p>Notifications: Issue a public notice in advance of the meeting.</p> <p>Room Setup: TAB members seated in council style. Audience chairs for others.</p> <p>Agenda:</p> <ul style="list-style-type: none"> • Approve bylaws • Approve biennial work plan • Approve Technical Committee's charter • Approve TAB Manager • Establish regular meeting schedule • Presentation on regional issue (for example, perhaps have Senator Blumenauer's staff speak on proposed congressional legislation for the National Scenic Area or invite someone who was involved in creating the bi-state bridge authority to speak. Another option could be a presentation on how the GORge Pass program is currently managed and pass revenues are distributed.) 	Facilitator
<p>Begin Monthly Technical Committee Meetings</p>	<p>Notifications: Obtain legal advice to determine if public notices are required for a staff-level coordinating committee.</p> <p>Typical Agenda:</p> <ul style="list-style-type: none"> • Coordinate any route, schedule, stop changes • Work on topics in charter, or as assigned by TAB • Prepare for upcoming TAB meeting <p>Meeting Records: Circulate draft meeting minutes to Technical Committee members for review; post final minutes to public facing website.</p>	Manager
<p>Begin Quarterly</p>	<p>Notifications: Issue a public notice in advance of each meeting or post annual meeting schedule to a public-facing website.</p> <p>Room Setup: TAB members seated in council style. Audience chairs for others.</p>	Manager

Step	Description	Responsible Party
TAB Meetings	<p>Typical Agenda:</p> <ul style="list-style-type: none"> • TAB Manager's Report • Technical Committee Chair's Report (include links to Technical Committee meeting minutes in TAB agenda packets) • Presentations/updates/discussion on work plan topics. <p>Meeting Records: Circulate draft meeting minutes to TAB representatives for review; post final minutes to public-facing website.</p>	

Pursue Funding Opportunities under the TAB

The TAB provides opportunities to address funding for new and enhanced service routes through improved coordination of existing funding sources as well as a more collective effort toward garnering revenue from new sources. For existing funding sources, such as Federal Transit Agency (FTA) formula allocations and fare revenue, the member agencies of the TAB should determine the best use of funding given their collective objectives. For new funding sources, such as state and federal discretionary funds or private-public partnerships, the TAB could better position themselves to partner with businesses and institutions or apply for discretionary funding by acting as a more unified entity.

Funding will be needed for service enhancements and new routes as well as the administration of the TAB. Assuming a relatively low cost of administration of the TAB, funds can be pooled from member agencies or member agencies could initiate the short-term funding strategies below to ease the cost of administration. For larger-scale capital and operational improvements, the TAB should coordinate the discretionary grant applications, which are outlined below. Additionally, with a more cohesive governance structure and regional objectives, the TAB should consider ongoing allocations from state and local governments through legislative actions and partnering with federal and state parks and recreation entities. The TAB should also explore opportunities to create single-county or joint districts to levy taxes and secure funding needed to implement the transit vision. More detail on all possible funding sources can be found in Memo 4.

In the short-term, the TAB member agencies should consider generating revenues through more easily accessible sources. These include increasing and standardizing fare rates across agencies, pooling resources to sell advertising to local businesses and institutions, and coordinating branding and messaging to increase community support. The dual-purpose of short-term funding opportunities is to directly fund operational expenses and create a pool of funding for potential discretionary grant projects. Most federal and state discretionary grant opportunities require at least a 20 percent local funding match therefore implementing short-term funding strategies demonstrates the financial viability of the services provided by member agencies.

In the long-term, the TAB member agencies should coordinate the usage of formula grant disbursements to member agencies and resources to develop and manage applications for discretionary funding as well as consider long-term positioning for the other state and local funding opportunities outlined in Memo 4. As the TAB becomes more established, discretionary grant funding opportunities play a more important role for larger capital and operational expansions aligning with the objectives of the TAB. Discretionary grant funding requires substantial project and budgetary planning as these grants are competitive and often require local funding match. Often federal discretionary grant funding for operational projects requires a 50 percent local funding match and capital projects requires a 20 percent local funding match. However, depending on the source, rural areas can gain exemption from or reduction of the local funding match. State discretionary grant opportunities often require a 20 percent local funding match regardless of the project type.

Table 3. Steps to Increase Funding Under the TAB

Step	Description	Responsible Party	Funding Consideration	Barriers or Related Initiatives
Short-Term Funding Opportunities	Agencies establish or raise fares.	All agencies	Raising fares could generate revenue for the ongoing administration of the TAB but would not likely contribute enough for service enhancements.	The trade-off between higher revenue, equity, and ridership should be considered before raising fares. This funding option would be changed by member agencies but should be coordinated at the TAB level. Increases in fare revenue could be dedicated to providing local match requirements for some of the large capital grants outlined below.
	The TAB agencies sell advertising space on capital resources or websites to local businesses and institutions.	All agencies	This funding option could be used for the ongoing administration of the TAB and agency operations. The scale of revenue from this source is not fully known.	Not all buses, stops, or other resources among TAB agencies have the capacity for advertisement.

Step	Description	Responsible Party	Funding Consideration	Barriers or Related Initiatives
	<p>The TAB agencies partner with local businesses to add an opt-out voluntary surcharge at point-of-sale.</p>	<p>All agencies</p>	<p>Due to the inconsistency of this funding source, the TAB agencies could utilize funds for discretionary spending. The TAB should target businesses or institutions with a nexus to tourism in the Columbia Gorge or to the commuter population. Entities who may be willing to partner would be local outdoor recreational stores and community colleges, such as Mount Hood Community College and Columbia Gorge Community College.</p>	<p>With coordinated branding and marketing, the public would be more likely to opt-in to the surcharge. Requires substantial community support to both partner with local businesses and garner revenue from the surcharge.</p>

Step	Description	Responsible Party	Funding Consideration	Barriers or Related Initiatives
<p>Long-Range Funding Opportunities¹</p>	<p>The TAB coordinates usage for member agencies' allocations from FTA Sections 5311, 5339(a), and 5310 formula grants for capital improvements, operations, marketing of specific programs, and administration. This coordination will help the TAB coordinate applications for funding opportunities based on the priorities of the Gorge TransLink Alliance.</p>	<p>Regional Body</p>	<p>Opportunities for project-based or initiative-based funding are available through these sources. Most capital and operations project costs are eligible to be covered by the grant.²</p>	<p>Many agencies already receive these funds, administered through local government entities. Coordinate the existing disbursement of funds and apply for an allocation specifically for the TAB. This would ensure that agencies' funding is not eroded and provide available funds for the TAB as a coordinating entity. FTA 5311 and 5310 require a local funding match of 20 percent for capital projects and 50 percent for operating projects.³</p>
	<p>The TAB agencies apply for the competitive Oregon state-level grant opportunities; Rural Transit Assistance Program (RTAP), and Statewide</p>	<p>All Oregon agencies with support from Regional Body</p>	<p>The Oregon member agencies can utilize STIF funding for operations, planning, and capital improvements. Oregon distributes RTAP funding for conference scholarships.</p>	<p>Complexities related to managing funding available to only some member agencies could arise. RTAP funding does not require a local match. STIF Intercommunity grants require a 20 percent local funding match</p>

¹ Additional long-term funding strategies are outlined in Memo #4. Discretionary grant opportunities, such as IFNF or FLAP, and partnerships with local and state governments could provide funding in the long-term, however these methods require substantial planning and the scale of funding is unknown.

² FTA Section 5311 contains the broadest project eligibility requirements. FTA Section 5310 requires projects to improve the use of transit for elderly individuals and individuals with disabilities. FTA Section 5339(a) would be utilized for capital investments associated with buses.

³ More information can be found at <https://www.transit.dot.gov/rural-formula-grants-5311> and <https://www.transit.dot.gov/funding/grants/enhanced-mobility-seniors-individuals-disabilities-section-5310>

Step	Description	Responsible Party	Funding Consideration	Barriers or Related Initiatives
	Transportation Improvement Fund (STIF).			(can be reduced to 10 percent for rural areas) and STIF Discretionary Fund grants require a 20 percent local match for capital projects and 50 percent for operational projects. ⁴
	The TAB agencies apply for competitive Washington state-level grant opportunities; RTAP (funded through FTA section 5311(b)(3)), and Regional Mobility Grant.	All Washington agencies with support from Regional Body	The Washington member agencies can utilize RTAP grants for training and technical assistance for transportation operators in rural areas. For training, the grant will reimburse 100% of costs of training up to \$600 and 50% up to \$1,000. The Regional Mobility Grant offers funding for capital and operational improvements as well as transportation demand management.	Complexities related to managing funding available to only some member agencies could arise. RTAP funding does not require a local match while Regional Mobility Grants require a 20 percent local match. ⁵
	The TAB agencies apply for discretionary federal grant opportunity: Rebuilding America's Infrastructure with	All agencies with support	The TAB agencies can better position themselves for receiving competitive federal grants through streamlined	These funds are used for large capital investments and would require substantial planning for their use. RAISE requires a 20

⁴ More information can be found at https://www.oregon.gov/odot/RPTD/RPTD%20Committee%20Meeting%20Documents/Statewide_Transportation_Improvement_Fund_Program_Guidebook.pdf

⁵ More information can be found at <https://wsdot.wa.gov/business-wsdot/grants/public-transportation-grants/grant-programs-and-awards/regional-mobility>

Step	Description	Responsible Party	Funding Consideration	Barriers or Related Initiatives
	Sustainability and Equity (RAISE).	from Regional Body	transit system coordination and planning related to an applicable project for the RAISE grant. ⁶	percent local funding match, with some exceptions for rural areas. ⁷

Regional Coordination Key Initiatives and Infrastructure and Information Key Initiatives

Development of regional policies and procedures will require time and patience to fully vet the impacts of each new policy on each of the member agencies. The TransLink Alliance or the TAB will be responsible for prioritizing initiatives to include in their annual work plans. The TransLink Alliance or the TAB should not attempt to address more than one or two policies at a time and a single representative should be assigned responsibility for coordinating the effort.

The initiatives presented in this focus on items that can likely be implemented with existing funding or with capital improvement grants.

Regional Stops

Transit travel between communities across county lines can require long waiting periods or overnight stays in remote areas to make a transfer between service providers. When providers change the locations of a stop or make schedule adjustments at that stop, it can have partner system impacts that create problems for inter-county travelers. Although greater frequency is needed to optimize transfers and minimize wait times, coordinating between Gorge TransLink members can improve the ability to travel between counties and increase the number of trips that do not require a transfer. Table 4 describes steps for establishing and maintaining regional stops.

Table 4. Steps for Regional Stops

Step	Description	Responsible Party	Funding Consideration	Barriers or Related Initiatives
Identify Regional Stops	Hold a work session across providers to identify regional stop locations.	Agency Staff, TAB	None	Data Collection

⁶ The minimum award for rural areas is \$1 million in FY 2023.

⁷ More information can be found at <https://www.transportation.gov/sites/dot.gov/files/2023-02/RAISE%202023%20NOFO%20Amendment2.pdf>

Create New Regional Stops	Provide a standing agenda item on TAB Technical Committee agendas for route and schedule coordination.	TAB	Consider FTA Section 5399(a), STIF (Oregon), Regional Mobility (Washington), or RAISE grant opportunities for establishing new routes or regional stops.	Form a TAB
Enhance Regional Stops	Provide branded shelters, timetables, and other amenities at each regional stop location by 2025.	Agency Staff	Consider utilizing FTA Section 5311 funds available for administration and operation of transit. In the recent past, Hood River County Transportation District received \$160,000 and MCEDD received \$228,000 from this source.	Form a TAB
Maintain Regional Stops	Create a regional procedure for who will maintain the regional stops.	Agency Staff	None	Form a TAB
Coordinate before Relocating Stops	Create a regional procedure for communicating and coordinating upcoming schedule changes.	Agency Staff, TAB	None	Form a TAB

Consistent Branding and Policies

Implement consistent branding of buses and stops, naming conventions for transit routes, and rider policies. Table 5 describes steps for establishing consistent branding and policies.

Table 5. Steps for Consistent Branding and Policies

Step	Description	Responsible Party	Funding Consideration	Barriers or Related Initiatives
Branding	Consistent branding of vehicles and bus stops supports public awareness of services. Provide consistent design standards and/or level of amenities at bus stops.	TAB	Consider utilizing a portion of allocated FTA Section 5311 funds for branding or advertising. Leverage short-term funding opportunities in Table 3 to increase brand awareness.	TransLink Phone Platform; Form a TAB

	Branding can include service area and phone numbers (e.g., include the cities served and share the phone number of the TransLink Phone Platform).			
Route-Naming Conventions	Establish route-naming conventions across providers that provide information about the service the route provides.	TAB	None	Form a TAB
Policies	Create consistent rules and guidelines regarding rider behavior, pet and service animals, bicycle transport, holiday service days, and operations schedules. Appendix C summarizes existing rider policies across service providers and recommends draft aligned policies.	TAB	None	Form a TAB

Marketing and Education

Additional strategies are needed to improve public recognition of the transit system.

Improve customer experience by enhancing marketing and education materials. Consolidate transit resources where riders can gather information across services on a single webpage that could be printed out. The steps for implementing this strategy are described in Table 6.

Table 6. Steps for Marketing and Education

Step	Description	Responsible Party	Funding Consideration	Barriers or Related Initiatives
Gather Information about Existing Transit Service	Gather detailed information about existing transit service and policies across providers.	All agencies	Use existing member agency staff time	
Create Clear and Concise Transit Resources	GORge Pass: Continue offering the GORge Pass to facilitate the ease of paying for transit across providers.	TransLink Alliance or TAB	None	
	Simplify Fare Payment: Align fare payment systems and prices across providers.			

Step	Description	Responsible Party	Funding Consideration	Barriers or Related Initiatives
	<p>TransLink Online Platform: Continue building a stronger online presence for travel resources at http://www.gorgetranslink.com. Ensure that information about all providers routes is available directly on the website for smooth user experience. Improve the ease of using the trip planning tool, and support route integration across providers in Google Maps.</p> <p>TransLink Phone Platform: Implement an automated phone information system with the same call-in number for all five transit agencies. This automated phone system can make it easier for passengers who use dial-a-ride to get pick-up times and cancel appointments. It can also provide information about routes, schedules, such as the next time a bus is scheduled to be at a specific stop. This would likely require all providers utilizing the same dispatch software for demand-response services.</p>		<p>ODOT Special Transportation Fund Discretionary Grant</p> <p>Ongoing funding from FTA Section 5310 and 5311 to member agencies could be utilized to make system enhancements.</p>	<p>Public Information Coordinator</p>
<p>Train Riders and Customer Service Representatives</p>	<p>Travel Training: Continue offering travel training in Wasco and Hood River Counties and expand the service to Klickitat, Skamania, and Sherman Counties.</p>	<p>TransLink Alliance or TAB</p>	<p>Sherman County could apply for Rural Transportation Equity Program through the DLCD for Travel Training Washington providers can apply for RTAP funding to cover costs of training</p>	

Step	Description	Responsible Party	Funding Consideration	Barriers or Related Initiatives
	<p>Customer Service Training Program: Provide an annual training session on regional pass sales and customer service strategies for staff at all TransLink Alliance member organizations and for staff at other organizations such as Travel Oregon and Explore Washington State.</p>		<p>Use existing member agency staff time Discretionary FTA Section 5314 and RTAP (Washington) grants for employment training</p>	
<p>Advertise Services</p>	<p>Marketing Campaigns: Market services through websites, social media, local newspapers, printed signs and banners, radio interviews, and/or direct mail.</p>	<p>TransLink Alliance or TAB</p>	<p>Ongoing FTA Section 5311 funding to member agencies, advertising, or surcharge revenue could be utilized.</p>	<p>Branding</p>
	<p>Public Information Coordinator: Create an additional part-time position dedicated to managing outreach and external communication efforts. This coordinator would be responsible for working with media consultants on outreach materials, managing the TransLink website, drafting key public messages for review and approval, preparing periodic press releases, providing radio and television interviews, implementing and managing a single-call information service, presenting to local agencies and organizations, and serving as a community organization.</p>	<p>TAB</p>	<p>An annual contribution of \$5,000 per member agency would provide a budget of \$25,000 to contract or hire a part-time public information coordinator</p>	<p>Form a TAB</p>
<p>Update Information about Existing Transit Service</p>	<p>Ensure materials are kept up to date as routes, schedules, and policies are updated.</p>	<p>All agencies</p>	<p>Ongoing FTA Section 5311 funding to member agencies, advertising, or</p>	

Step	Description	Responsible Party	Funding Consideration	Barriers or Related Initiatives
			surcharge revenue could be utilized.	

Data Collection

Creating a uniform process for collecting, recording, storing, and reporting passenger information and operational data across counties to support applications for grant funding and inform route planning. Table 7 describes steps for standardizing and utilizing data collection.

Table 7. Steps for Data Collection

Step	Description	Responsible Party	Funding Consideration	Barriers or Related Initiatives
Inventory Existing Data Collection	Inventory existing data collection tools and methodologies.	All agencies	None	
Standardize Data Collection	Identify performance metrics to track and create consistent methodologies for tracking those metrics across providers.	TAB	None	Form a TAB
Regional Performance Tracking	Create a performance monitoring process that tracks regional ridership, costs, and benefits of transit travel in the region. Each member agency will provide consistent, periodic data on ridership, routes, and vehicles to track performance.	All agencies	For agencies with allocated FTA Section 5311 funds, regional performance tracking should be a high priority for that funding. Accurate data on ridership and operations promotes opportunities for funding. For agencies without those funds, consider utilizing FTA Section 5310 allocations, or pool resources with other agencies.	

Data Distribution	Establish data accessibility and management responsibilities.	TAB	Form a TAB
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Service Enhancement Key Initiatives

The initiatives presented in this focus on items that would require additional funding.

Expand Capacity to Provide Transit Service

Steps to expand transit service capacity are detailed in Table 8.

Table 8. Steps to Expand Service Capacity

Step	Description	Responsible Party	Funding Consideration	Barriers or Related Initiatives
Contracting Services	<p>Identify which providers have capacity to provide additional transit service for themselves or to other counties.</p> <p>Explore opportunities to either contract services with transit providers who have capacity or to partner with those providers to apply for funding to run service directly (without the additional administration costs of contracting).</p> <p>To fill capacity needs beyond what TransLink providers have available, explore opportunities to hire additional staff or contract with private transportation providers.</p> <p>Providers servicing routes across state lines will need Federal Motor Carrier Safety Administration (FMCSA) permits.⁸</p>	<p>Agencies with need for weekend capacity are primarily responsible for exploring opportunities to contract transit service or partner with other providers to apply for the funding.</p> <p>Agencies with additional capacity should identify what capacity they could provide and what costs would be, and prepare to acquire FMCSA permits.</p>	<p>If services are contracted with Oregon providers, Oregon providers will need to charge higher than their current cost per service hour to ensure they do not operate services at a loss unless their governing bodies see value to their constituents in</p>	<p>Creating a co-op could help with this process in the future.</p>

⁸ Additional information about FMCSA passenger carrier guidance is available here: <https://www.fmcsa.dot.gov/regulations/passenger-carrier-guidance-fact-sheet>

Step	Description	Responsible Party	Funding Consideration	Barriers or Related Initiatives
			subsidizing the service	
Pursue Funding Opportunities	As identified under <i>Governance Key Initiatives</i> pursue funding opportunities under the TAB.	All agencies with support of the TAB	Pursue funding opportunities identified in Table 3.	Agencies are already using FTA and STIF grants to provide service. Though increased coordination may provide opportunities to secure substantial additional funding, it is likely that other governance scenarios will need to be established to secure sufficient funding to expand transit service. Memo 5 provides an overview of funding opportunities available under different governance scenarios.
Establish Fleet Storage and Maintenance Agreements	Establish fleet storage and maintenance agreements, particularly where routes are run across county lines or are contracted.	TAB		

Weekend Service

Provide service 7 days/week across the I-84 and SR-14 routes within all counties.

Weekend service is currently provided along the following routes:

- Hood River – Wyeth – Cascade Locks – Multnomah Falls – Troutdale/Wood Village – Portland
- The Dalles – Hood River
 - Frequency is lower on this route than on the Columbia Gorge Express (3-4 trips/day vs. 7 trips/day)

Weekend service is not provided along the following existing routes:

- White Salmon – Bingen – Hood River
 - Although this route is not specifically along the I-84 and SR-14 corridors, adding this intercity weekend service provides a key connection to the I-84 and SR-14 routes and is included in this initiative
- Bingen – Vancouver

The following routes are proposed to be implemented with 7 days/week service as part of the Columbia Gorge Transit Strategy:

- Bingen – Lyle - Dallesport
- The Dalles – Celilo Village

Table 9 details steps for implementing weekend service once capacity is established. It is unlikely that there will be sufficient funding to provide this level of service within the 3-year planning horizon, however providers should take actions to add or increase service frequency along these routes. The cost increases account for the cost of providing new service or additional frequency; they do not account for the cost of providing existing levels of service.

Table 9. Steps for Weekend Service

Step	Description	Responsible Party	Cost Increase (Annual) ¹	Funding Consideration	Barriers or Related Initiatives
Increase Service Frequency along Weekend Routes	Increase service along The Dalles – Hood River route to match frequency of the Columbia Gorge Express.	<ul style="list-style-type: none"> • Wasco County Partners • Hood River County • Oregon Department of Transportation 	\$200,000 (Weekend and Weekdays)	FTA Section 5311 could cover a substantial portion of the costs to increase service frequency, if agencies pooled resources. For example, in 2019, Hood River County Transportation District received \$160,000 and MCEDD received \$228,000. On the Oregon side, the STIF grant could cover some of the costs with disbursements based on a population formula as well as discretionary allocations. STIF can be utilized for operations, capital investments, and planning. On the Washington side, the Regional Mobility Grant can be implemented in a similar manner as the Oregon STIF.	

Step	Description	Responsible Party	Cost Increase (Annual) ¹	Funding Consideration	Barriers or Related Initiatives
Add Weekend Service to Existing Routes	Add weekend service to the Bingen – Vancouver route.	<ul style="list-style-type: none"> Skamania County Partners <ul style="list-style-type: none"> Klickitat County Clark County Washington Department of Transportation 	\$90,000 (Weekends)	Due to the relatively lower cost of adding weekend service, agencies could utilize the short-term funding opportunities outlined in Table 3, or FTA formula allocations. Regional Mobility and STIF grants could apply. Discretionary funding for state distributed FTA 5399(a) Buses and Bus Facilities is also available through ODOT and WSDOT could also apply depending on the needs for service increase.	Likely requires contracting service as no service is provided in Klickitat or Skamania Counties on weekends
	Add weekend service to the Goldendale – The Dalles route.	Partners <ul style="list-style-type: none"> Klickitat County Wasco County Oregon Department of Transportation Washington Department of Transportation 	\$80,000 (Weekends)	Agencies could utilize the short-term funding opportunities outlined in Table 3, or FTA formula allocations. Additionally, STIF awards could be utilized for Oregon-side operations, while the Regional Mobility Grant can be utilized for Washington-side operations. Discretionary funding for state distributed FTA 5399(a) Buses and Bus Facilities is also available through ODOT and WSDOT.	Requires providing service across state lines
	Add weekend service to the White Salmon – Bingen – Hood River route.	Partners <ul style="list-style-type: none"> Klickitat County Hood River County Oregon Department of Transportation 	\$100,000 (Weekends)	Agencies could utilize the short-term funding opportunities outlined in Table 3, FTA formula allocations, STIF grant (Oregon), Regional Mobility grant (Washington), and discretionary funding for state distributed FTA 5399(a) Buses and Bus Facilities is also available through ODOT and WSDOT. These grant programs provide substantial long-term funding for capital and operational projects.	Requires providing service across state lines

Step	Description	Responsible Party	Cost Increase (Annual) ¹	Funding Consideration	Barriers or Related Initiatives
Take Actions to Add Weekend Service to New Routes	Bingen – Lyle – Dallesport route	<ul style="list-style-type: none"> Washington Department of Transportation Klickitat County Partners Washington Department of Transportation 	\$240,000 (Weekends and Weekdays)	Across the steps taken to add service or increase service frequency, agencies can consider applying for federal discretionary RAISE grants with coordination at the TAB level. Minimum award for rural project is \$1 million and covers initial operations, planning, and additional capital costs needed to enhance regional stops or purchase transit equipment. STIF grant (Oregon), Regional Mobility grant (Washington), and discretionary funding for state distributed FTA 5399(a) Buses and Bus Facilities also provide substantial long-term funding for capital and operational projects.	Adding new routes will require more significant funding for route planning, creation of stops, and providing service throughout the week, these items will likely be provided outside the 3 year key initiative window
	The Dalles – Celilo Village	<ul style="list-style-type: none"> Wasco County Partners Sherman County Oregon Department of Transportation 	\$240,000 (Weekends and Weekdays)	RAISE, STIF and Regional Mobility grants should be considered to add weekend service to new routes, given the higher cost. Discretionary funding for buses and bus facilities is also available through ODOT and WSDOT.	

¹ Costs assume \$80/service hour. Annual service hours are estimated based current number of runs and time it takes to complete a run today. For example, the Goldendale – The Dalles Route operates 4 runs/weekday and it takes 2.25 hours to complete that run. Therefore, the cost increase of providing that run on weekends was estimated as \$80 per service hour x 2.25 hours per run x 4 runs per day x 2 additional days per week x 52 weeks per year. That value is rounded up to the nearest \$10,000.

NEXT STEPS

The consultant team will prepare a document summarizing critical information and findings from Memos 2 through 5 outlining the regional transit strategy for the project area. This step will include another opportunity for public involvement before it is considered for adoption.

APPENDIX A. KEY INITIATIVES WORKSHOP

Chart A - 1. Most Important Key Initiatives

Which Key Initiatives Are Most Important to Accomplish in the Next 1-3 Years?
(Respondents selected their top 3.)

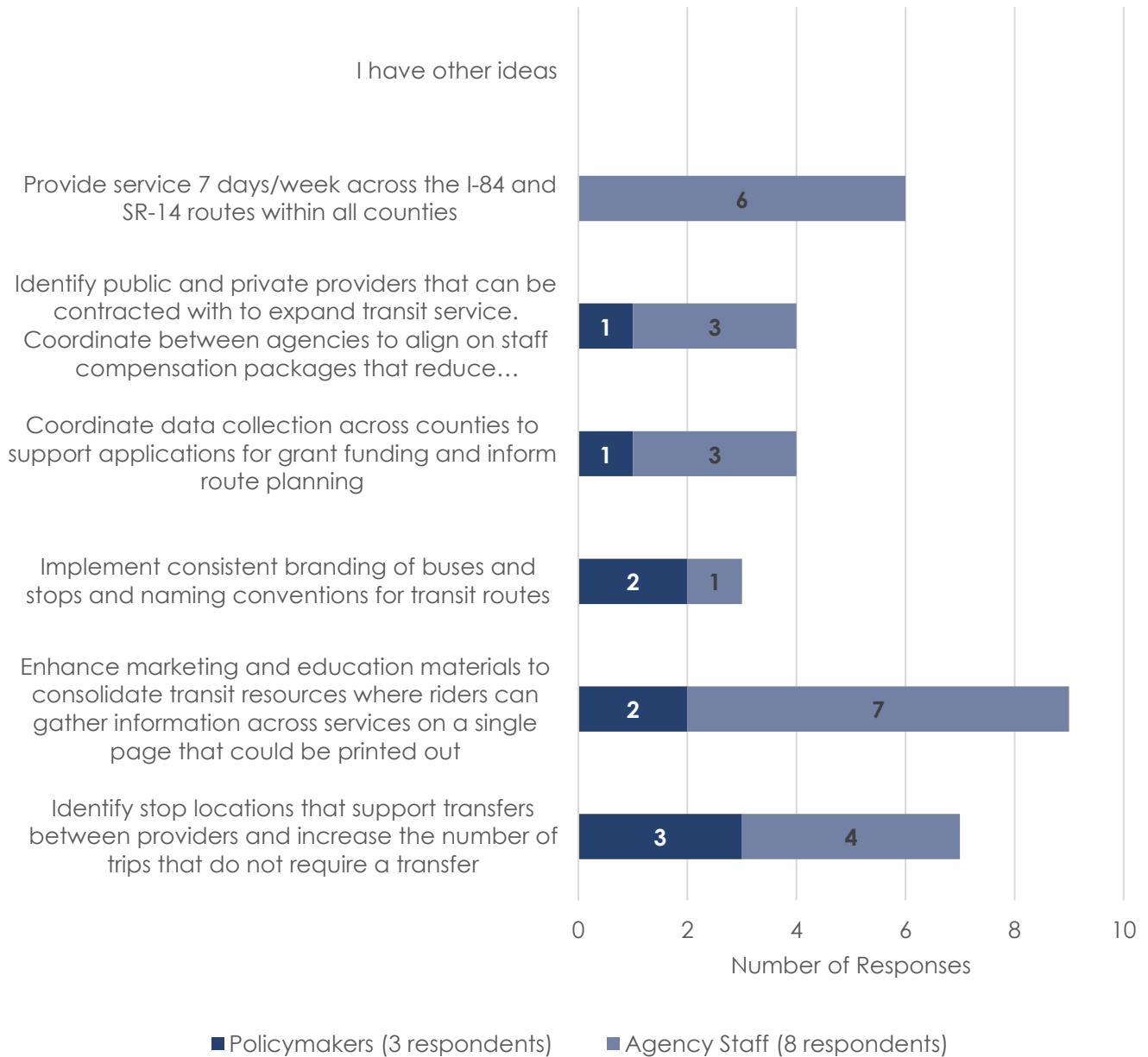


Chart A - 2. Responsibilities of a TAB

If a TAB is formed, what responsibilities should the new board have?

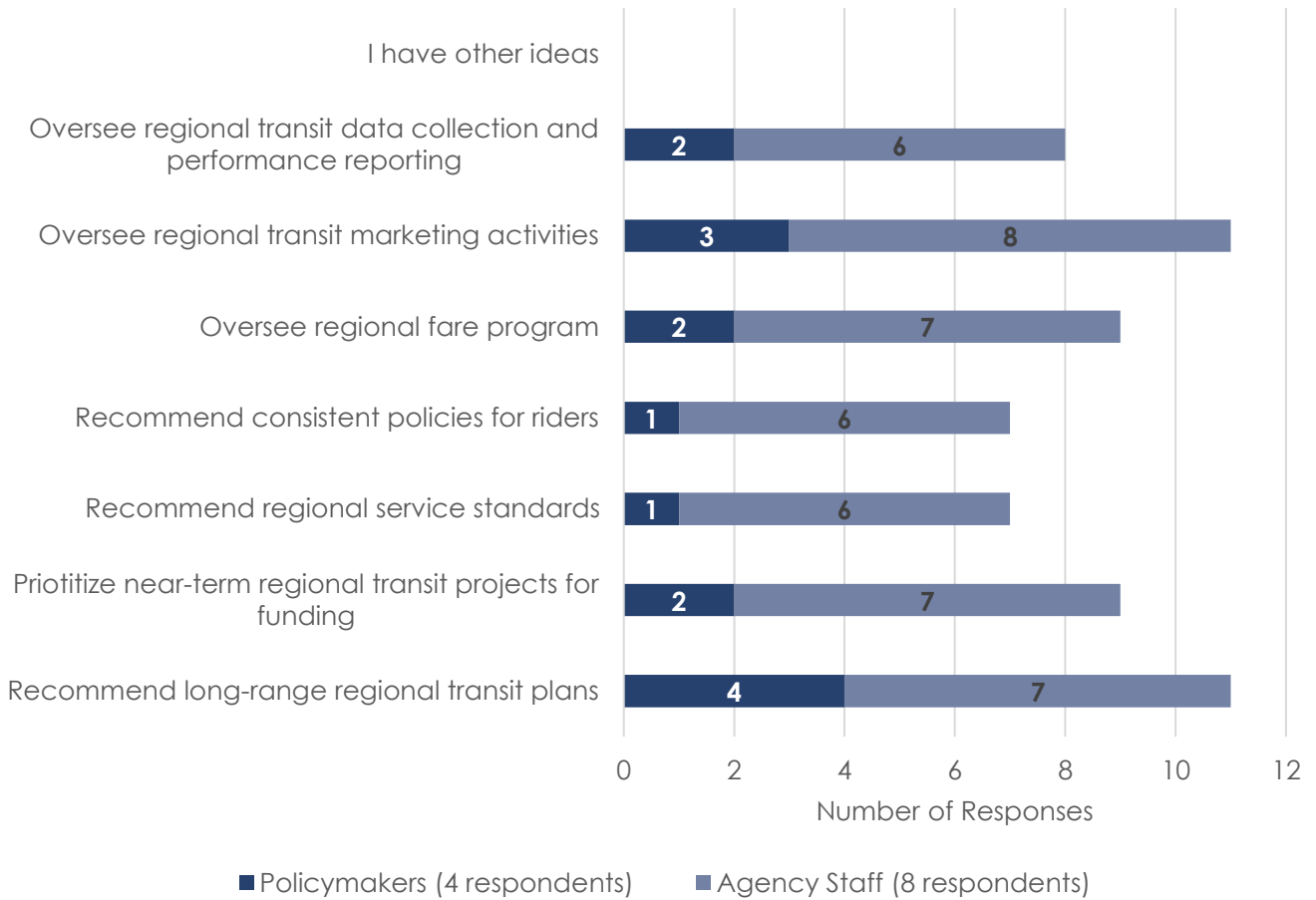


Chart A - 3. Membership of a TAB

If a TAB is formed, who should be offered a seat?

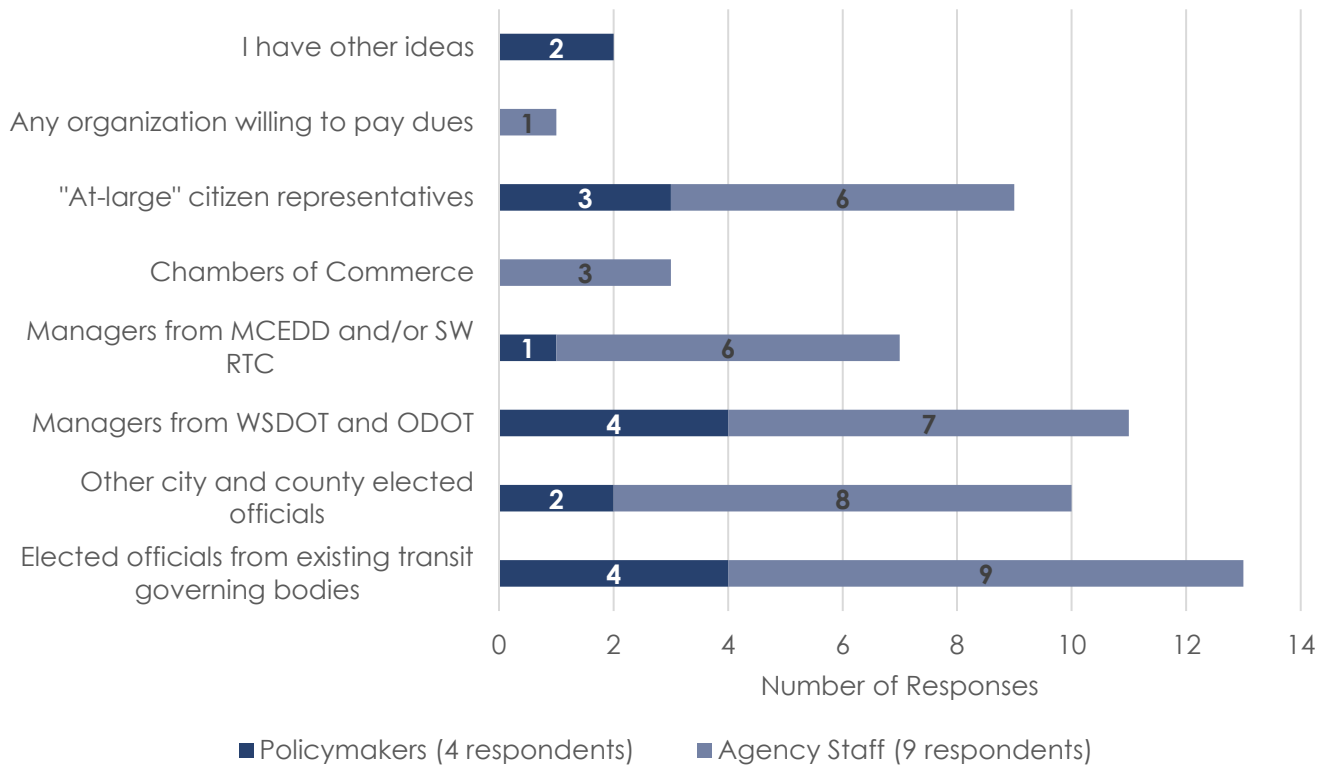


Chart A - 4. Staffing of a TAB

If a TAB is formed, who should staff it?

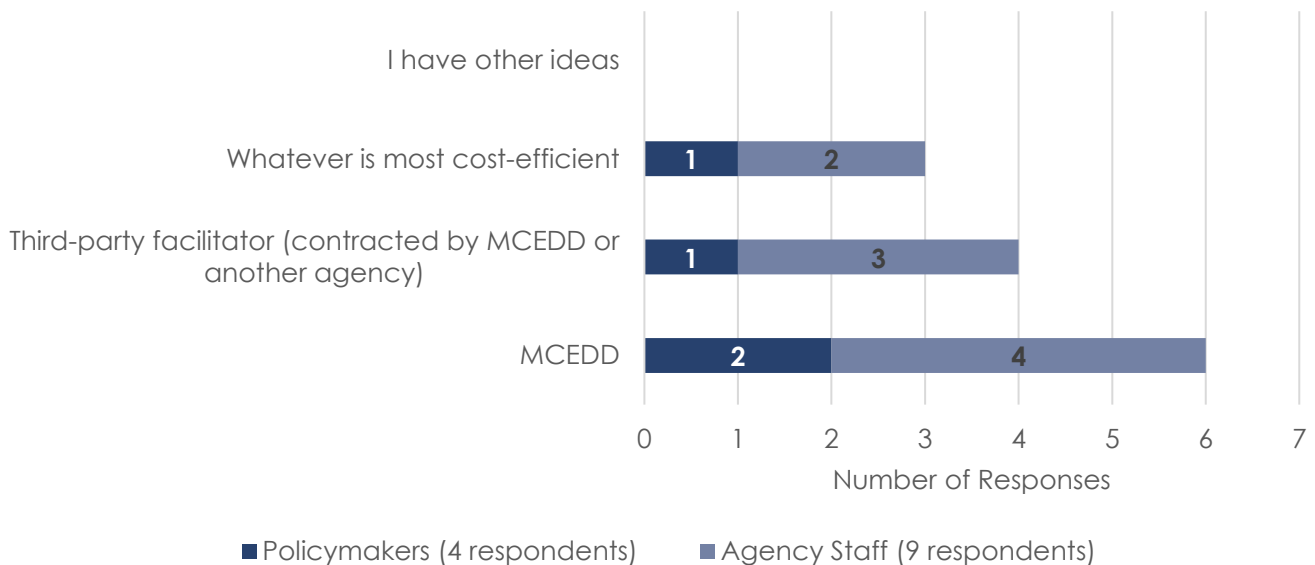


Chart A - 5. How a TAB would Impact the Current Staff-Level Group

If a TAB is formed, what should happen with the current staff-level group?

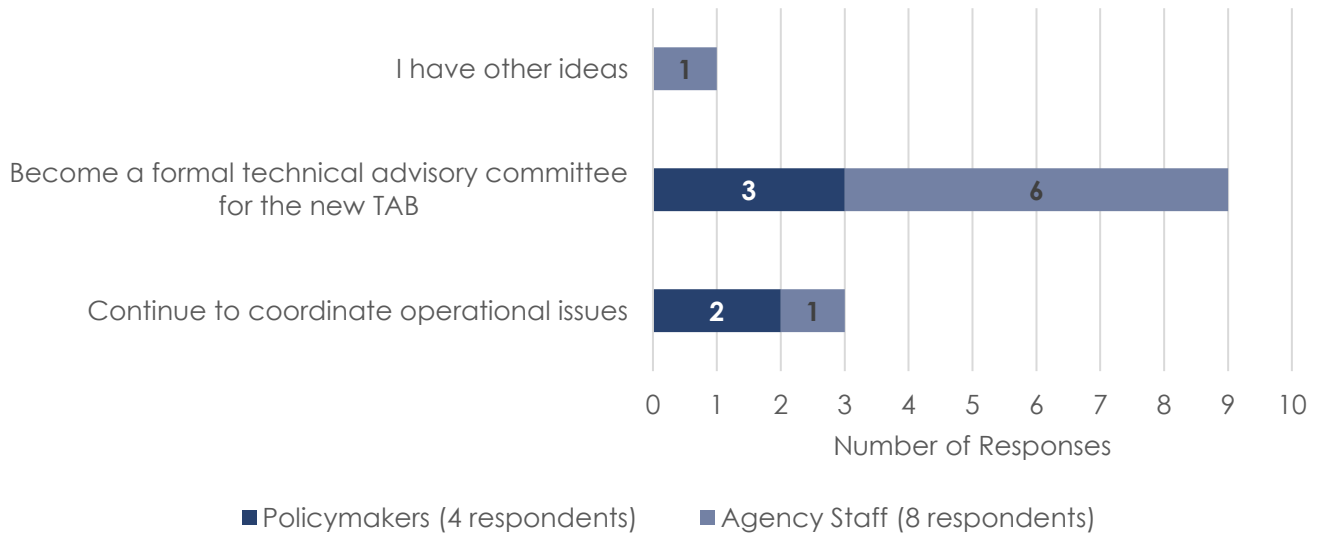


Chart A - 6. Interest in a TAB

Given today's discussion, how do you feel about forming a Transit Advisory Board for the region?

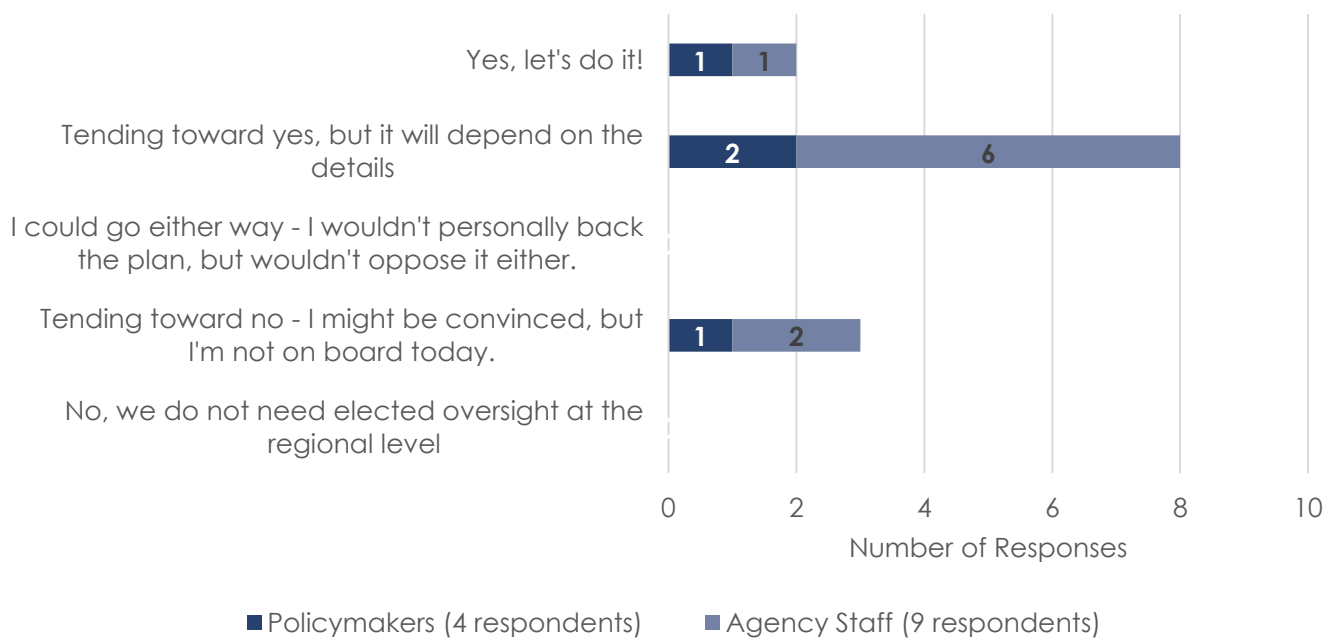
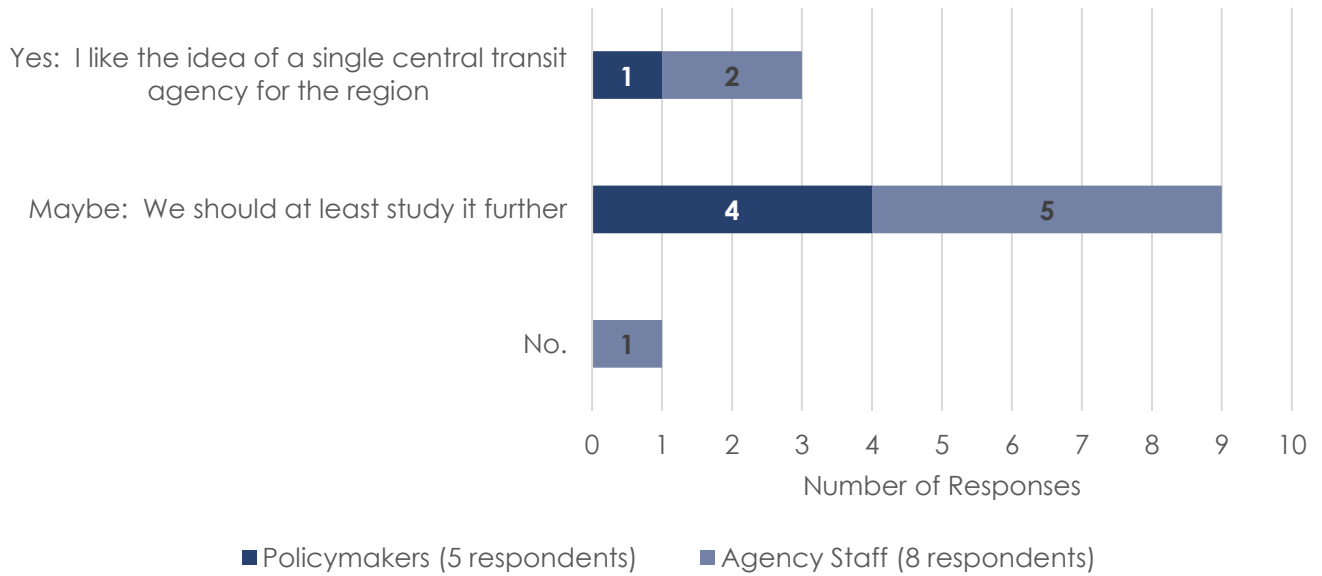


Chart A - 7. Interest in Further Regionalization/Centralization

If a TAB is formed, should the TAB explore further regionalization/centralization later?
(Such as forming a regional co-op, or working on legislation to create a new bi-state transit agency)



APPENDIX B. NUTS AND BOLTS TOOLKIT

This appendix includes the following sample documents:

- Sample TAB MOU
- Sample TAB Bylaws
- Sample TAB Work Plan
- Sample Technical Committee Charter

**MEMORANDUM OF UNDERSTANDING
BETWEEN THE OREGON AND WASHINGTON PARTNERS REGARDING
REGIONAL TRANSIT GOVERNANCE AND SERVICE DELIVERY IN THE MID-COLUMBIA REGION**

STEP 1: This sample MOU IS provided for MCEDD's use in facilitating the formation of a regional transit advisory board. It should be refined and edited to align with discussions and decisions made during the TAB formational process.

This MEMORANDUM OF UNDERSTANDING ("MOU") is hereby made and entered into, by and between, <list partner agencies, including counties, cities, HRTD, state DOTs, and/or others in both states>

While nonbinding, this MOU establishes the methods by which the partnering agencies cooperatively oversee the implementation of regional transit delivery strategies; provide policy-level guidance on transit matters affecting more than one partner agency; and explore the potential creation of a new regional transit cooperative or bi-state transit authority.

RECITALS

1. Residents in the mid-Columbia region need the ability to travel seamlessly across county lines via transit, for access to jobs, services, shopping, and other essential needs. Efficient, streamlined travel by transit is also important to support the region's growing economy, including recreational travel within the Columbia River Gorge National Scenic Area.
2. Transit service delivery in the mid-Columbia region is currently provided by multiple agencies, including Skamania County, Klickitat County, Wasco County, Hood River County Transportation District, Sherman County, and ODOT.
3. Recognizing their customers' need for efficient coordination between transit providers, transit agency staff began meeting regularly in 2001 to discuss connection issues between counties and to identify areas where joint strategies may be beneficial.
4. In 2010, transit agency partners signed a Memorandum of Understanding to create a regional mobility manager position housed within the Mid-Columbia Economic Development District. The mobility manager's role has been to facilitate meetings for the interagency staff group, prepare an annual work plan to identify and prioritize future coordination strategies, and assume a lead role in implementing identified transit strategies.
5. Since 2010, the interagency staff group has made a number of improvements to transit service delivery for residents across the region, including implementation of regional marketing strategies, a regional fare program, and improved online information. To help improve service across county lines, agency staff have also facilitated multiple interagency operating agreements between the various transit agency partners.
6. From 2020 to 2023, MCEDD sponsored a two-phase Gorge Transit Strategy (GTS) project that prompted an evaluation of how regional transit decisions are made. This work highlighted the

distinction between the role of elected officials *who should collectively decide policy issues*, and staff who are responsible for implementing those policy directions.

7. A key recommendation from the GTS project is to expand governmental capacity to provide transit service. In the near-term, this may be accomplished through joint contracting between existing agencies or with third-party service providers. Over the long-term there is interest in exploring the creation of a new regional cooperative or bi-state transit authority that may consolidate transit operations across the region under a single service provider.
8. Additional recommendations from the GTS project include addressing transit staff compensation disparities between agencies, enhancing marketing and educational materials, implementing consistent branding of buses and stops and transit route naming conventions, identifying key transfer locations, increasing the number of trips that do not require transfers, providing 7-days/week service in key corridors, and coordinating data collection and performance reporting across counties.
9. Recommendations listed in items 7 and 8 above include significant policy topics; however, there is currently no established forum for discussion of transit matters by regional policymakers. While interagency coordination at the staff level will continue to be essential, greater engagement of, and interaction between, elected officials across the region is needed for appropriate due diligence as future governance options are examined and other GTS recommendations are implemented.
10. This MOU sets forth the role, responsibilities, and work plan of the Mid-Columbia Transit Advisory Board (MCTAB), agreed to by the Oregon and Washington Partners, to oversee regional transit initiatives affecting more than one county, and to explore the creation of a regional transit cooperative or a bi-state transit authority.

UNDERSTANDING

1. Composition of MCTAB

- 1.1. Klickitat County, Skamania County, Hood River County Transportation District, Wasco County, and Sherman County will each appoint one member of its governing body to the MCTAB, and one member of its governing body as an alternate.
- 1.2. The cities of <List cities identified as partners during the formational process.> will each appoint one member of its governing body to the MCTAB, and one member of its governing body as an alternate. <Alternatively, the formational process may limit board participation to one or more seats to be shared by multiple cities. In that case, this section should be revised to explain the process by which city representatives will be appointed.>
- 1.3. The directors of WSDOT and ODOT will each appoint one senior-level manager to the MCTAB.
- 1.4. List others who will be offered a seat on the MCTAB.
- 1.5. Each of these appointments will be made in the manner and for the term determined by the appointing body.
- 1.6. Each jurisdiction will promptly designate a new member, or alternate, to fill any vacancy that arises.

2. Purpose and Authority of MCTAB

2.1. MCTAB will be responsible for:

- a. Guiding the implementation of regional transit strategies agreed to by the member agencies and resolving issues by consensus
- b. Identifying collaborative transit work topics for the region
- c. Overseeing the collection and reporting of regional transit performance data
- d. Overseeing regional transit marketing programs and materials
- e. Seeking funding necessary to evaluate the feasibility of a regional transit cooperative or bi-state transit authority for the Mid-Columbia region
- f. Facilitating the implementation of a regional cooperative or bi-state transit authority, with concurrence of the partners.

2.2. MCTAB shall have the authority to approve MCTAB bylaws and biennial work plan, select its Manager, and direct the work of any committees convened by MCTAB.

2.3. The governing bodies of the jurisdictions will be responsible for approving or rejecting MCTAB recommendations, or other actions required of their organization by the consensus direction set by MCTAB.

3. Public Engagement

3.1. MCTAB is responsible for undertaking an open and equitable public engagement process on regional transit initiatives.

3.2. MCTAB will maintain online information to keep the public updated on MCTAB activities.

3.3. Meetings of MCTAB will follow the applicable public meeting and records laws of Oregon and Washington.

3.4. MCTAB will ensure there are meaningful opportunities for public input at key decision points.

4. Board Functions and Leadership

4.1. MCTAB officers will include a chair and vice chair selected by MCTAB members from their ranks.

4.2. MCTAB officers are responsible for setting strategic direction for MCTAB, keeping MCTAB focused on its intended purpose, and fostering the effectiveness of MCTAB members in implementing its work plan.

4.3. MCTAB will prepare adopt bylaws to govern the board's operating procedures.

4.4. Bylaws will establish:

- a. Board member roles and responsibilities
- b. Board officer selection process, terms of service and responsibilities
- c. Meeting procedures and protocols
- d. Admission of new members to the board

- e. Conditions for withdrawal or expulsion of members from the board
- f. Staffing for the board
- g. Procedures for chartering any subordinate committees.

5. MCTAB Work Plan

5.1. MCTAB will adopt a two-year work plan identifying tasks to be completed, responsible parties, and timelines.

5.2. The initial work plan will include, but is not limited to, the following tasks:

- a. Charter a Technical Committee comprised of interagency transit staff
- b. Explore and recommend joint contracting opportunities between existing service providers
- c. Secure grant funding for feasibility analysis of a regional transit cooperative and/or bi-state transit authority
- d. Review changes to the regional transit marketing program, as changes are proposed
- e. Review GOrge Pass utilization and revenue distribution quarterly
- f. Recommend uniform transit data collection standards for the region
- g. Publish an annual regional transit performance report, as data is available
- h. At the end of each work plan biennium, publish a brief report of MCTAB accomplishments and progress made in the prior two years
- i. <list other tasks anticipated in first 2 years >

5.3. The work plan will be updated biennially.

6. Management of the Work

6.1. Work plan tasks will be undertaken by a Lead Agency agreed to by MCTAB. The lead agency will retain a Manager to oversee required day-to-day technical and administrative work. MCTAB will approve the proposed Manager.

6.2. The Manager will, within the available budget:

- a. Prepare MCTAB's biennial work plan for MCTAB approval
- b. Prepare funding plans and make funding applications for MCTAB approval, as needed to accomplish the tasks in MCTAB's work plan
- c. Procure and manage consulting teams required by the work plan
- d. Arrange staff support for MCTAB meetings and any subordinate committees chartered by MCTAB
- e. Undertake public engagement and stakeholder coordination activities, as directed by MCTAB
- f. Provide quarterly reports on work plan progress to MCTAB

7. Funding of Work Activities

- 7.1. MCTAB is responsible for securing the grant funding required to complete work plan tasks.
- 7.2. MCTAB will seek funding contributions for from Oregon and Washington agencies/jurisdictions, if needed, with the intent of securing equitable contributions from Oregon and Washington agencies/ jurisdictions.
- 7.3. Bi-state funding will be pooled so that work plan tasks can be prioritized, procured, and managed by the Manager and Lead Agency to implement the work plan agreed to by MCTAB.
- 7.4. Funding will be provided to the Lead Agency through interlocal/governmental agreements; granting agency will oversee the work to ensure it complies with the terms and conditions of the grant.

8. Long-Term Governance

- 8.1. MCTAB will explore the feasibility of an independent regional transit cooperative or bi-state transit authority for long-term governance and provision of transit services across the region.
- 8.2. Feasibility analyses will include:
 - a. Legal research (including, in the case of a regional cooperative, determining the most advantageous state in which to organize)
 - b. A proposed business plan that includes proposed cooperative or transit authority board composition, staffing, operating plan, capital needs assessment, and Initial annual budget proposal
 - c. A financial feasibility and funding plan, including capital, operating, maintenance, and administrative costs, and proposed revenue sources
 - d. Recommendation for continuation or dissolution of existing transit agencies
- 8.3. Prior to forming a regional cooperative or proposing legislation establishing a bi-state authority to the Oregon and Washington legislatures, MCTAB will seek supporting resolutions from the governing bodies represented on MCTAB.
- 8.4. If MCTAB determines to recommend the creation of a regional transit cooperative, and supporting resolutions are passed by all governing bodies represented on MCTAB, MCTAB will prepare and file formational materials. A regional transit cooperative will not be created without supporting resolutions by all governing bodies represented on MCTAB.
- 8.5. If MCTAB determines to recommend the creation of an independent bi-state authority, and supporting resolutions are passed by all governing bodies represented on MCTAB, MCTAB will prepare and propose bi-state legislation to establish the bi-state authority during the 2025 or 2026 legislative sessions. Formational legislation for a regional entity will not be pursued without supporting resolutions by all governing bodies represented on MCTAB.
- 8.6. If MCTAB does not reach consensus on a decision to implement a regional transit cooperative or a bi-state transit authority, or if all governing bodies represented on MCTAB do not concur with MCTAB's recommendation, or if a bi-state authority is not approved by the Oregon and Washington legislatures, MCTAB will continue in its role as described in this MOU.

IN WITNESS WHEREOF, the parties hereto have executed this Memorandum of Understanding as of the last date below.

<insert names of signatories, titles, and agencies>

_____ Date

DRAFT

**MID-COLUMBIA TRANSIT ADVISORY BOARD
BYLAWS**

Adopted by MCTAB: <Date>

STEP 2: These **sample bylaws** are provided for a new transit advisory board's use once an MOU has been signed. They should be refined and edited to align with how the new board prefers to function.

ARTICLE I. NAME

The name of the organization is the Mid-Columbia Transit Advisory Board, hereafter called the ORGANIZATION.

ARTICLE II. LOCATION

The principal office of the ORGANIZATION is located in <location>.

ARTICLE III. PURPOSE

The ORGANIZATION exists for the purpose identified in memorandum of understanding dated <date>, which is entitled, "MEMORANDUM OF UNDERSTANDING BETWEEN THE OREGON AND WASHINGTON PARTNERS REGARDING REGIONAL TRANSIT GOVERNANCE AND SERVICE DELIVERY IN THE MID-COLUMBIA REGION", hereinafter called the MOU.

ARTICLE IV. MEMBERSHIP

1. **Eligibility.** Membership is open to governmental agencies with transit or transportation jurisdiction in Skamania and Klickitat Counties in Washington, and Hood River, Wasco, and Sherman Counties in Oregon, and the Oregon and Washington Departments of Transportation.
2. **Admission.** Each partner agency must approve its own proposed delegate and alternate. New members are admitted by consensus of the existing ORGANIZATION members.
3. **Member Roles and Responsibilities**
 - a. Members are expected to stay focused on the directives established for the ORGANIZATION in the MOU.
 - b. Members or their alternates are expected to regularly attend meetings of the ORGANIZATION's board, and actively participate in discussions.
 - c. Members are responsible for reviewing and approving minutes following each board meeting.
 - d. Members are expected to be familiar with where the ORGANIZATION's records are held, and how to access them. (Such as the MOU, these bylaws, meeting minutes, financial information, study reports, etc.)

- e. Individual members are responsible for sharing information with other agencies and stakeholder groups within their jurisdictions. Issues raised by external stakeholders should be conveyed back to the ORGANIZATION's board for information or action.
 - f. Members are asked to keep the ORGANIZATION apprised of broad strategic and policy actions contemplated or taken by their agency which may impact regional transit matters.
 - g. Members are expected to disclose any conflicts of interest that may arise during their service on the ORGANIZATION's board.
4. **Withdrawal of Member Agency.** Any member agency may withdraw from the ORGANIZATION after giving written notice to the ORGANIZATION's board.
 5. **Replacement of Member Agency Representative.** A member agency's governing body may replace its representative at any time.
 6. **Expulsion of Member Agency's Representative.** By a two-thirds vote of the ORGANIZATION'S board, a member agency's representative may be expelled from the ORGANIZATION for failing to carry out the expectations of members. No representative may be expelled except after notice from the ORGANIZATION of the alleged failure along with reasonable opportunity of not less than fifteen (15) days to cure. The representative may request a hearing before the ORGANIZATION's board before any final decision, which shall be held no more than fifteen (15) days after the expiration of the time to cure has passed.

ARTICLE V. OFFICERS

1. **Officer Selection.** Members shall nominate and elect a CHAIR and VICE CHAIR from their ranks, based on a two-thirds majority vote with a quorum present.
2. **Officer Terms of Service.** The term of service for CHAIR and VICE CHAIR positions shall be 2 years.
3. **Officer Roles and Responsibilities**
 - a. The primary role of the CHAIR and VICE CHAIR is to ensure the board is effective in setting and implementing the ORGANIZATION'S directives as outlined in the MOU, including keeping the board focused on those directives.
 - b. The CHAIR shall review and approve board meeting agendas before they are distributed to members.
 - c. The CHAIR shall conduct meetings of the board, encouraging the involvement of all members in discussion.
 - d. The VICE CHAIR shall conduct meetings in the CHAIR's absence.

ARTICLE VI. MEETING PROCEDURES

1. **Regular Meeting Schedule.** Meetings of the ORGANIZATION's board shall be convened at least quarterly, at a date and time approved by a consensus of the members.
2. **Special Meetings.** The CHAIR may call a special meeting or shall call a special meeting at the request of a majority of members of the board.
3. **Open Public Meetings.** All provisions of law applicable to open public meetings in <state where principal office is located> shall be observed.
4. **Quorum.** A majority of members shall constitute a quorum to do business.

ARTICLE VII. DECISIONMAKING

1. **Advisory Role.** The ORGANIZATION exists as an advisory body for the purpose of making recommendations by consensus to member agency governing bodies.
2. **Regional Governance Recommendations.** Consensus of the ORGANIZATION's members is required for the ORGANIZATION to issue recommendations for or against forming a regional transit cooperative or bi-state transit authority.
3. **Other Recommendations - Generally.** The board shall seek consensus on all other acts and recommendations of the ORGANIZATION. Where consensus cannot be reached, the ORGANIZATION may proceed based on a two-thirds majority of its members, provided that a summary of dissent is included when the ORGANIZATION'S recommendations are submitted to member agency governing bodies.

ARTICLE VIII. COMMITTEES

1. **Technical Committee.** The ORGANIZATION shall create a technical committee comprised of staff from member agencies, to assist the ORGANIZATION in making informed recommendations about regional transit matters.
2. **Other Committees.** The ORGANIZATION may create citizen committees, convene additional subject matter experts, and/or form any other committees deemed necessary to develop information needed for the ORGANIZATION's work.
3. **Committee Charters.** For each committee, the ORGANIZATION shall approve a charter documenting the committee's purpose, participants, leadership roles, tasks and deliverables, timelines, and progress reporting expectations.

ARTICLE IX. STAFFING

1. **Lead Agency.** <Name of Agency>, hereinafter called LEAD AGENCY shall retain a MANAGER and other personnel as needed to support the activities of the ORGANIZATION's board and committees. Support personnel may be provided from LEAD AGENCY's in-house staff, or contracted staff.
2. **Approval of Manager.** The ORGANIZATION shall approve by consensus the MANAGER proposed by LEAD AGENCY, and any subsequent changes to the MANAGER position.
3. **Manager Responsibilities.** The MANAGER's duties shall include:
 - a. Work closely with the CHAIR to prepare board meeting agendas and other meeting materials.
 - b. Ensure proper notification of ORGANIZATION's meetings to member agencies.
 - c. Ensure compliance with applicable public meeting laws.
 - d. Attend all board meetings.
 - e. Provide draft and final board meeting summaries.
 - f. Arrange staff support for any committees chartered by the ORGANIZATION.
 - g. Draft the ORGANIZATION's biennial work plan for approval of the members.

- h. Estimate the cost to accomplish tasks in the ORGANIZATION's work plan and prepare funding applications as needed to accomplish the work. This may include coordinating with member agency governing bodies to secure local matching funds if required.
- i. Work with LEAD AGENCY to procure consultant assistance, if required to accomplish the ORGANIZATION's work plan. Manage and oversee any consultants retained.
- j. Provide reports on work plan progress at the ORGANIZATION's regular meetings.

DRAFT

MID-COLUMBIA TRANSIT ADVISORY BOARD

BIENNIAL WORK PLAN

For the period of **<Start Date>** to **<End Date>**

Approved by MCTAB: **<Date>**

STEP 3: This **sample work plan template** is provided for a new transit advisory board's use once an MOU has been signed. This sample should be refined and edited to align with final recommendations from the GTS project and other desires of the new board.

INTRODUCTION

Describe process that led to TAB formation

MISSION AND VISION

The vision statement (forward looking) could simply be the one developed for the GTS project.

A mission statement (what the group is doing today to support the vision) should be developed at the beginning of the TAB formation process. It should be a succinct statement of the group's overarching purpose. Perhaps be something like: *"Our mission is to collaborate on regional transit policy initiatives affecting more than one county and examine the feasibility of creating a central agency to manage transit programs across the Mid-Columbia region."*

MCTAB WORK PLAN FOR 2024-2025 CALENDAR BIENNIUM

Tasks	Details	Est. Cost and Funding Source	Timeline
Administrative Tasks			
MCTAB Bylaws	Develop and approve bylaws to guide board operations and select a Manager.	Staff time only to draft the bylaws.	Due Date
Technical Committee Charter	Approve a charter for a staff-level subcommittee that can provide technical insights and perspectives to the TAB. The charter should outline the technical committee’s purpose and expectations to help keep the group focused on TAB-sanctioned topics and tasks. The existing staff-level group could be asked to provide a recommended charter for the TAB to review.	Staff time only to draft the charter.	Due Date
Key Initiative: Determine Feasibility of a Regional Transit Cooperative or Bi-State Transit Authority			
Seek Feasibility Study Funding	<p>Approximately \$500,000 will be needed for a comprehensive feasibility study that includes:</p> <ul style="list-style-type: none"> • Legal research (including, in the case of a regional cooperative, determining the most advantageous state in which to organize) • A proposed business plan that includes proposed cooperative or transit authority board composition, staffing, operating plan, capital needs assessment, and an Initial annual budget proposal • A financial feasibility analysis and funding plan, including proposed revenue sources for all identified capital, operating, maintenance, and administrative costs during the start-up period and annually thereafter • A recommendation for continuation or dissolution of existing transit agencies • The study should include MCTAB work sessions at key decision points, opportunities for stakeholder input, 	Staff time only for funding research, application, and interagency coordination.	<p>Identify a funding plan for the feasibility study by <date></p> <p>Execute funding IGAs with partner agencies (if needed) by <date></p> <p>Secure funding by <date></p>

Tasks	Details	Est. Cost and Funding Source	Timeline
	<p>and a public involvement program</p> <p>Technical Committee Role: Outline a statement of work for the feasibility study</p> <p>MCTAB Manager Role: Identify potential funding sources and coordinate any match requirements. Apply for funding upon approval of MCTAB member agency governing boards.</p>		
Key Initiative: Expand Near-Term Capacity to Provide Transit Service (from Kittleson Memo 6):			
List tasks needed to accomplish this initiative	Provide task description, including the role of the Technical Committee, if any, and the TAB's Manager.	Explain where the money will come from to do this task.	List approximate timeline for completion
Key Initiative: Align Transit Staff Compensation between Agencies (from Kittleson Memo 6):			
List tasks needed to accomplish this initiative	Provide task description, including the role of the Technical Committee, if any, and the TAB's Manager.	Explain where the money will come from to do this task.	List approximate timeline for completion
Key Initiative: Enhance Regional Marketing and Education Materials (from Kittleson Memo 6):			
List tasks needed to accomplish this initiative	Provide task description, including the role of the Technical Committee, if any, and the TAB's Manager.	Explain where the money will come from to do this task.	List approximate timeline for completion

Tasks	Details	Est. Cost and Funding Source	Timeline
Key Initiative: Consistent Branding of Buses, Routes, and Stops (from Kittleson Memo 6):			
List tasks needed to accomplish this initiative	Provide task description, including the role of the Technical Committee, if any, and the TAB's Manager.	Explain where the money will come from to do this task.	List approximate timeline for completion
Key Initiative: Identify Transfer Hubs and Reduce the Need to Transfer (from Kittleson Memo 6):			
List tasks needed to accomplish this initiative	Provide task description, including the role of the Technical Committee, if any, and the TAB's Manager.	Explain where the money will come from to do this task.	List approximate timeline for completion
Key Initiative: 7 Days/Week Service in I-84 and SR-14 Corridors (from Kittleson Memo 6):			
List tasks needed to accomplish this initiative	Provide task description, including the role of the Technical Committee, if any, and the TAB's Manager.	Explain where the money will come from to do this task.	List approximate timeline for completion
Key Initiative: Regional Data Collection and Performance Reporting Program (from Kittleson Memo 6):			
List tasks needed to accomplish this initiative	Provide task description, including the role of the Technical Committee, if any, and the TAB's Manager.	Explain where the money will come from to do this task.	List approximate timeline for completion

Tasks	Details	Est. Cost and Funding Source	Timeline
Key Initiative: Insert Any Other Initiatives Identified by the TAB during the Formational Process			
List tasks needed to accomplish this initiative	Provide task description, including the role of the Technical Committee, if any, and the TAB's Manager.	Explain where the money will come from to do this task.	List approximate timeline for completion

DRAFT

MID-COLUMBIA TRANSIT ADVISORY BOARD

TECHNICAL COMMITTEE CHARTER

Approved by MCTAB: <Date>

STEP 4: This **sample technical committee charter** is provided for a new Transit Advisory Board's use once an MOU has been signed and a work plan has been adopted. This sample should be refined and edited to align with how the new TAB prefers their technical committee to function.

The current staff-level group could work on refining this sample charter and then present it to the TAB for approval.

Committee Chair: <name and agency>

Committee Vice Chair: <name and agency>

Members: <list names and agencies, or attach a roster>

Committee Purpose: The Technical Committee provides staff-level insights and perspectives to assist MCTAB with making informed recommendations to its member agency governing bodies.

This committee has a key role in helping to develop uniform standards and procedures to improve regional transit service delivery and coordinating day to day operations between neighboring transit providers. The Technical Committee is also charged with supporting specific tasks in the MCTAB Biennial Work Plan.

Committee Protocols and Expectations

- Meetings are approximately monthly. Members are expected to attend regularly.
- MCTAB's Manager prepares meeting agendas, in consultation with the Technical Committee Chair.

- The Chair conducts the meetings; the Vice Chair fills in when the chair is absent.
- Collaborative topics to be addressed and tasks performed by this committee are assigned by the MCTAB board. The committee is expected to remain focused on MCTAB-sanctioned topics and tasks.
- The Technical Committee chair or vice chair is expected to provide verbal updates on the committee’s activities and work progress at MCTAB board meetings.

Technical Committee Work Plan

Task or Deliverable	Lead Person	Estimated Timeline
Quarterly Reports to MCTAB. Present a verbal update on Technical Committee activities and progress at each MCTAB meeting, or as requested by MCTAB Chair.	Technical Committee Chair	Quarterly
Operational Coordination. Coordinate to minimize the impact of operational changes on inter-county travelers. Continue working to identify incremental operational improvements between service providers.	Group	Ongoing
Regional Co-op / Transit Authority Feasibility Study. Outline a recommended statement of work that can be used to seek funding and solicit consulting support for a feasibility study.	MCTAB Manager to provide initial outline for group to review and edit.	Recommended statement of work to TAB board by <date>
List other tasks from GTS Memo 6 and the MCTAB work plan that will need to be addressed by the Technical Committee here		

Anticipated Dissolution Date: N/A - This is a standing subcommittee.

APPENDIX C. RIDER POLICIES

	MATS	The Link	CAT	Skamania	New Aligned Policy DRAFT
Pets	Pets in approved pet carriers only: limit 1. (from Rack Card)	No written policy	<p>Non-service animals may ride at the discretion of the operator under these guidelines:</p> <ul style="list-style-type: none"> • Drivers may refuse to transport a person and their dog if they already have another dog onboard. • Drivers may refuse to transport or request the removal of a dog if it is creating a hazard or disturbance. • All dogs that are not service animals must be on leash and muzzled. • No dogs on seats; they must remain either on the floor on the owner's lap. • All other animals must be in a confined container or carrier. 	<p>Prohibited: Allowing any animal to run at large, to unreasonably disturb others, or interfere with transit-related activities</p>	<p>Non-service animals may ride at the discretion of the operator under these guidelines:</p> <ul style="list-style-type: none"> • Drivers may refuse to transport a person and their dog if they already have another dog onboard. • Drivers may refuse to transport or may request the removal of a dog if it is creating a hazard or disturbance. • All dogs must be on leash. • No dogs on seats; they must remain either on the floor or on the owner's lap. • All other animals must be in a confined container or carrier.
Service animals	No written policy	Service animals are welcomed as long as the service animal is under your control at all times.	<p>Service animals are allowed on all Columbia Area Transit vehicles. This includes animals-in-training accompanied by a trainer or person with disability. No permit is required, but the driver may ask if your animal is a service animal. Service animals must remain on the floor without blocking the aisle or on the owner's lap.</p>	<p>3.2 ADA Policy (11/2020) <u>Service Animals:</u></p> <ul style="list-style-type: none"> • A service animal is any guide dog, signal dog, or miniature horse individually trained to work or perform tasks for an individual with a disability. In order to ride SCSS Transportation Program: <ul style="list-style-type: none"> • The animal must be on a leash, tether or harness unless use of such a device would interfere with the task the service animal performs, or the person's disability prevents use of such devices. • Birds, reptiles, amphibians, rodents, and cats must be kept in an enclosed carrier/container. • The service animal must remain under control of the owner and behave appropriately at all times. 	<p>Do we want to draft up a consistent policy for services animals? Some of these examples are pretty basic, which is good. Or just refer to ADA law?</p>

	MATS	The Link	CAT	Skamania	New Aligned Policy DRAFT
Bikes	Bicycle Friendly: Be ready to stow and go!	No written policy	--Space for the bike is first come first served. --Riders must secure their own bikes, although drivers can give guidance	No written policy	--Bike racks are to be used when available. Other options may be available on a case to case basis. --Space for the bike is first come first served. --Riders must secure their own bikes

	MATS	The Link	CAT	Skamania	New Aligned Policy DRAFT
Kids	No written policy, but allow kids under 12 must have adult supervision.	Requires kids 12 yrs and under to have adult attendant. Waiver system in place. Children must have safety seats. MCEDD will not bill an additional bus fare for a child's attendant while accompanying the child. Children six through twelve years old may ride the bus alone if there is an adult at the place of departure and arrival. If the point of departure or arrival is a school that is in session, no direct adult supervision is required. One adult may supervise a group of children. A parent may sign a waiver of responsibility to allow their six to twelve year old child to ride The LINK without adult supervision at the pick-up and drop-off points. Children under five years of age and children with special physical or developmental needs, regardless of age, must have an attendant with them for their entire trip.	Kids 11 and over can ride the bus without an adult.	No written policy.	Note that the age requirements are all slightly different! --Note that the Link requires kids 12 yrs old to have adult supervision or a waiver. Skamania—do you have a kids policy? CAT—will find out why they chose 10 and under to require adult supervision. MATS—what is your exact wording for kids policy?

	MATS	The Link	CAT	Skamania	New Aligned Policy DRAFT
Rider Service Suspension For bad behavior	Riders who do not follow these guidelines will lose their door-to-door transportation privileges for three months. Repeated violations by MATS clients may result in permanent loss of door-to-door transportation.	Drivers can refuse riders service based on, but not limited to, violent or disruptive behavior that is not disability related, illegal conduct, threats to the safety of themselves or others, and refusal to follow the Rider Rules of Conduct. Riders can be suspended from the service for up 7 days for a first offense, up to 14 days for a second offense and up to 21 days for subsequent offenses. Riders will be notified by the Transportation Operations Manager in writing prior to the suspension being imposed. The notice will specify the basis for the proposed suspension, the proposed duration of the suspension, and the process to appeal the proposed suspension.	Passenger suspension process includes trying to work with the rider but with options to suspend riding privileges by 1-4 wks to indefinite.	Suspension for a period not to exceed one year. First Offense: 30-90days Second Offense: 91-180 days Third Offense: 181-365 days Each Subsequent Offense 365 days	

	MATS	The Link	CAT	Skamania	New Aligned Policy DRAFT
Bags and bagged cans	<p>No more bags than riders can carry on at one time and place under the seat or in their lap. Items may not be placed in the aisle or in another seat: limit 4. Drivers cannot assist with bags.</p>	<p>Only two bags (or the equivalent) are allowed. Bags must be able to fit with passenger at their seat and not block aisle or present risk to other passengers. Wheelchair tie-down areas must be kept clear for those uses and cannot be used to transport personal carts.</p>	<p>Practice safety: don't block the aisles or doors with bags, strollers, or other large objects. No written policy re: cans.</p>	<p>No written policy.</p>	