

DRAFT

CLACKAMAS COUNTY BOARD OF COUNTY COMMISSIONERS

Study Session Worksheet

Presentation Date: June 13, 2017 **Approx. Start Time:** 2:30 am Approx.

Length: 30 minutes.

Presentation Title: Mount Hood Express – Update and IGA with City of Sandy

Department: County Administration

Presenters: Dan Chandler, Teresa Christopherson

Other Invitees:

WHAT ACTION ARE YOU REQUESTING FROM THE BOARD?

We are asking the Board to approve entering into an Intergovernmental agreement (IGA) with the City of Sandy, providing that the City will take over certain administrative aspects of the Mt. Hood Express transit system.

EXECUTIVE SUMMARY:

The Mt. Hood Express (MHX) is a successful transit program that operates between the City of Sandy and destinations on Mt. Hood in Clackamas County. The program was the product of advocacy by the Villages at Mt. Hood, and has been run by H3S for the past several years.

H3S has run the program in the past because it ties in with some of our social services related transportation programs. However, as MHX expands, its relationship to H3S programs becomes more diluted.

City of Sandy IGA

The City of Sandy's SAM Bus Service has proposed to enter into an Intergovernmental Agreement (IGA) with the County to hire two staff and take over much of the administrative burden of running the system. The County would continue to provide planning support for the "Transit around Mt. Hood" project, and would maintain grant writing and reporting responsibilities for the biennium. The County would pay the City \$55,000 per year for the next two years, which is a cost savings from the current arrangement.

The program has had a strong increase in ridership over the last several years, from 23,000 riders in 13/14 to 52,000 riders in 15/16. The program has both political and financial support from the business community in the Mt Hood area.

Current Funding

Mt. Hood express operates on a mix of 9 different funding sources, with a FY 17/18 budget of \$583,000. An ongoing budget proposal is attached. The chief funding sources are a Federal Lands Access Program (FLAP) grant, and a Rural Transit Grant. The County general fund has contributed \$86,000 per year for the past two years. The \$86,000 was a policy level proposal that expired this year.

In order to continue the program, the County needs to come up with \$55,000 for each of the next two years. For the 17/18 fiscal year, Tourism and Cultural Affairs has offered to contribute \$45,000 in one-time funds, while the departments of Business and Community Services and Transportation and Development have each offered to contribute \$5,000.

Long Term Funding

The FLAP grant was recently renewed for three more years, through February of 2021. The FLAP grant also includes funding for a “Transit around Mt. Hood” project that will make recommendations for a permanent transit and funding strategy, perhaps in conjunction with a similar, successful transit program in the Columbia Gorge. See *Multnomah Falls shuttle back by popular demand, could expand to Hood River in 2018*, Oregonian, April 11, 2017.

http://www.oregonlive.com/travel/index.ssf/2017/04/multnomah_falls_shuttle_back_b.html

Administration

Teresa Christopherson from the Social Services division within H3S has been running the Mt. Hood Express with the help of an administrative analyst. H3S would like more of Teresa’s time, and would like to move administration of the program out of the Social Services Division. The IGA with Sandy will help achieve both of these goals.

FINANCIAL IMPLICATIONS (current year and ongoing):

Is this item in your current budget? YES X NO

As noted above, for the 17/18 fiscal year, the contract cost will be covered within existing budgets. We anticipate submitting a policy level proposal for the 18/19 fiscal year to cover the second year of the contract.

The County’s contribution leverages other funds at a 10:1 ratio, and provides a very valuable service to the community.

STRATEGIC PLAN ALIGNMENT

- How does this item align with the County’s Performance Clackamas goals?

This program falls within several areas of focus, but particularly supports both our economic development and tourism goals. Employees, hikers, skiers and mountain bikers all use the MHX service. Specifically, the MHS program should help us achieve the following County goal:

- Tourist activity in Clackamas County should increase at or above the statewide rate.

The program also supports Safe, Healthy and Secure Communities by providing access to health care services for Mt. Hood area residents.

LEGAL/POLICY REQUIREMENTS:

Counsel will review and approve the final IGA before it is presented.

ATTACHMENTS:

- a. City of Sandy proposal
- b. Year-end reports 2015 and 2016
- c. Ridership snapshot
- d. 17/18 budget projection

SUBMITTED BY:

Division Director/Head Approval _____

Department Director/Head Approval _____

County Administrator Approval _____

For information on this issue or copies of attachments, please contact Dan Chandler @ 503-742-5394

City of Sandy Clackamas County Employee Support Proposal

In an effort of collaboration and cost effective management, the City of Sandy Transit Department proposes a supported administrative employment approach between the City of Sandy and Clackamas County. Sandy and Clackamas County have a demonstrated record of collaboration through shared contracting and facility utilization. As outlined in the Mt Hood Service and Sustainable Operations Plan, there could be further efficiencies for both systems through the mutual use of administrative employees. Due to the lack of authority for the City of Sandy in the Mount Hood communities, the City cannot claim jurisdiction to the Mount Hood System, however the two can work together to seamlessly operate regardless of funding structure. See proposal below.

City of Sandy will employ 1 Program Administrator (STEP 7) at \$4065/month

City of Sandy will employ 1 Administrative Secretary (STEP 3) at \$2790/month

Both positions will be City employees, however their job descriptions will be outlined as support positions for both Sandy Transit and the Clackamas County Mount Hood Service.

The City of Sandy is proposing a commitment of \$55,000 per year from the County to provide the following functions for Mount Hood Express Services:

- Compile data required for completion of fiscal and grant reports, including tracking performance measures
- Conduct semiannual rider surveys as required by grants and compile results for analysis
- Conduct research and analysis associated with policy and program development
- Work with MHX contractor for operational issues requiring county input
- Assist with completion of grant applications and other activities designed to promote long term stable funding
- Work with Hoodland area businesses to promote ridership and to effectively communicate service needs and upcoming changes
- Assist with planning and coordination of events
- Provide staff support to the Mt Hood Transportation Alliance, including taking minutes and following up on action items
- Update the MHX website and respond to information requests
- Interact with public at the Sandy Park and Ride location
- General office and clerical duties as needed
- Participate in required training programs and staff meetings
- Other tasks and projects as needed

Job Descriptions listed below.

City of Sandy

Job Description

Job Title: Transit Program Administrator (confidential)
Supervised by: Transit Director
Status: Full time Employee (Exempt)

POSITION SUMMARY

The Transit Program Administrator is a confidential class position, responsible for a wide range of duties that support the work of the Sandy and Mt Hood Transit Services. Responsibilities include, but are not limited to public contact, coordinating special projects and events, writing documents and reports, and understanding government regulations in the development of policies and procedures. This person will work independently under general direction. Therefore, he or she must show good judgment, be prepared to handle confrontational or stressful situations, and deal effectively with coworkers, the public, business owners and other agency staff.

SALARY AND BENEFITS

Salary range \$4065-5188 per month plus excellent benefits. This is a permanent, full-time position with benefits and eligibility for PERS after 6 months. New position hires generally begin at Step A, \$4065/month.

PRIMARY DUTIES & RESPONSIBILITIES

- Compile data required for completion of fiscal and grant reports, including tracking performance measures
- Conduct semiannual rider surveys as required by grants and compile results for analysis
- Conduct research and analysis associated with policy and program development
- Work with contractor for operational issues requiring county input.
- Coordinate and/or create marketing activities (literature production/distribution, flyers, ads, public notices)
- Assist with completion of grant applications and other activities designed to promote long term stable funding.

- Work with Sandy and Hoodland area businesses to promote ridership and to effectively communicate service needs and upcoming changes
- Assist with planning and coordination of events
- Provide staff support to the Mt Hood Transportation Alliance, including taking minutes and following up on action items.
- Oversee the management of the Transit Assistant regarding the transit tax database, tax collections and audits.
- Work with the Transit Assistant to oversee the front desk activities and questions, especially regarding Mount Hood Express services, park and rides and general questions.
- Create documents and correspondence
- Update the website and respond to information requests

- Understand legal documents; follow written or oral instructions and exercise independent judgment
- Participate in required training programs and staff meetings
- Maintain an awareness of current transit legislation
- Attend work and perform duties, primarily in office setting

Other tasks and projects as needed by either Sandy or Mount Hood Services.

EXPERIENCE & EDUCATION

A bachelor's degree from an accredited college or university, preferably in public administration, business or a closely related field relative to public transportation is required. Experience in public transportation is preferred. Any combination of experience and education which provides the applicant with the level of required knowledge and abilities will be considered.

COMPENSATION & BENEFITS

- \$48,780 - \$62,256
- Vacation
- Holidays
- Sick Leave
- Medical / Dental Allowance
- Life Insurance
- Employee Assistance Program
- Oregon State PERS Retirement

City of Sandy

Job Description

Job Title: Transit Administrative Secretary
Supervised by: Transit Director
Status: Full time Employee

POSITION SUMMARY

The Transit Administrative Secretary is responsible for a wide range of duties that support the work of the operations center which includes Public Works and Parks as well as Transit. Responsibilities include, but are not limited to, data entry, document creation, mass mailings, public contact, reports, and general office clerical duties. This person will work independently under general direction. The position must be able to interact effectively with coworkers, the public, business owners and other agency staff.

SALARY AND BENEFITS

Salary range \$2790 – 3561 per month plus excellent benefits. A pre-employment criminal background check is required. This is a permanent, full-time position with benefits and eligibility for PERS after 6 months. Positions usually begin at low end of salary range.

PRIMARY DUTIES & RESPONSIBILITIES

- Transit Tax Data entry, tax collection letters and mailings
- Public Works backflow device data entry, reminder notices, mailings
- Create documents and correspondence
- Keep website information current
- General office and clerical duties for Sandy and Clackamas County Transit
- Coordinate and/or create marketing activities (literature production/distribution, flyers, ads, public notices).
- Willingness to disseminate information throughout town including bus shelters.
- Set up meeting rooms, produce meeting materials, generate minutes for Transit Advisory Committee and other meetings
- Participate in required training programs and staff meetings
- Organization of front desk and copy/supply room for Operations Center
- Maintain a schedule of Parks, PW programs such as gazebo and/or wood chipper rental
- Attend work and perform duties, primarily in office setting
- Other tasks and projects as needed

REQUIRED QUALIFICATIONS

- Two-year college degree or equivalent training or experience
- Ability to work independently on assigned tasks and to make decisions with minimal supervision
- Ability to prioritize and organize tasks within specific timelines

- Ability to exercise good judgment, courtesy, patience, and tact in public contact and problem resolution
- Valid Oregon Driver's License
- Excellent interpersonal, verbal, written and phone skills
- Intermediate to advanced proficiency with computer programs (Windows, Excel, Access, Publisher or equivalent)
- Ability to operate office machines (i.e. copier, fax, and ten-key calculator)
- Must be capable of promoting public and employees trust and confidence
- Some overnight travel required

PREFERRED QUALIFICATIONS

- Bilingual English/Spanish
- Knowledge of geographic service district
- Customer service skills
- Oregon Commercial Driver's License

PHYSICAL REQUIRMENTS

- Repetitive motion, prolonged sitting
- Extensive visual/hearing involvement
- Extensive verbal communication, primarily via telephone
- Occasional lifting of items from below the knees or above the shoulders
- Bending or stretching ability adequate to properly secure mobility devices and bicycles on board company vehicles
- Ability to lift 40 pounds

Work is performed primarily in an office environment, will require bending, hearing voice conversations, keyboarding, lifting up to 40 lbs, pushing, reaching and walking. A considerable amount of sitting is required. Some out-of-office tasks may be required.

COMPENSATION & BENEFITS

\$33,480 - \$42,732

Vacation

Holidays

Sick Leave

Medical / Dental Allowance

Life Insurance

Employee Assistance Program

Oregon State PERS Retirement

Mt Hood Express 2016 Year End Report



Executive Summary

The 2015-2016 year brought with it record breaking ridership numbers - over 52,000. Ridership increased 23 %, exceeding projections by 3 %, compared to the previous year (see figure 1).

Due to the extremely high demand during peak winter weekends and holidays, we were able to supplement the Express service by adding three runs with the assistance of ODOT and private partners.

Summer brought with it high demand as well. To accommodate peak summer season riders, with many riders of transporting a bicycles, we added a third bicycle trailer to our inventory.

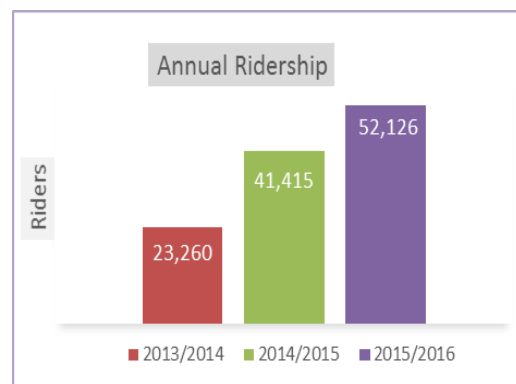


Figure 1- Annual Ridership

Surveys were conducted in summer and winter to determine the demographic and trip characteristics of transit riders on Mt. Hood Express and Mt Hood Villages Shuttle buses. Both summer and winter riders stated that primary trip purposes were for recreation and work. At least 40 % of summer and 44 % of winter respondents had other transportation options, but elected to ride the bus. Never the less, there are many riders, at least 56 %, that do not have other transportation options.

Starting this winter the Village Shuttle will add weekend service to its schedule. This fall we are conducting surveys and face-to-face outreach to help make sure riders' needs are being met.

Looking forward, Mt Hood Express Implementation Report's recommendations will be explored. County staff, Sandy Transit Metro, Mt Hood Transportation Alliance, and community partners are committed to continuing to work together to help Mt Hood residents and visitors' access public transportation options - safely, efficiently, and affordably.

Background

The Mt Hood Express, formerly Mountain Express, has been providing public transit service to residents of the Mt Hood area for over 11 years. In 2013, Mt Hood Express was able to expand service to Government Camp and Timberline with a unique public-private partnership model. Two planning efforts, the Alternative Transit and Transportation Demand Management Study in the Mt Hood area (ATTDMS, USFS, 2012) and the Mt Hood Multimodal Transportation Plan (2014), both identified public transit as an essential component of short and long term transportation planning.

As a result of these efforts, a new alliance of public entities and private business interests came together to form the Mt Hood Transportation Alliance. The Mt Hood National Forest, the City of Sandy, and Clackamas County were able to successfully seek grants for the newly renamed Mt Hood Express, including one of the first Federal Land Access Program grants provided for public transit operations. A Paul G Sarbanes Transit in Parks grant provided for the purchase of two buses to expand bus service to Government Camp and Timberline Lodge. Matching funds have been contributed by private businesses, including Timberline Lodge, Mt Hood Ski Bowl and The Resort at The Mountain. The new expanded service began in October 2013, and has been very successful on weekdays.

The Express provides commuter bus service between the City of Sandy and locations along Highway 26 to Timberline Lodge seven days per week year round except for Thanksgiving Day and Christmas Day. The seasonal model provided seven bus round trips per day during the winter season (December to March) and six round trips per day during the rest of the year. The Villages Shuttle continues to provide local deviated fixed-route shuttle service for the Villages at Mt Hood community.

Both the, Express and Villages Shuttle services are closely coordinated with the City of Sandy's Sandy Area Metro (SAM) bus routes so riders can transfer with minimal wait times.

Evaluation

The 2015-2016 year brought with it record breaking ridership numbers – 52,126. Ridership increased 23 %, exceeding projections by 3 %, compared to the previous year.

The Express service evaluation shows the continued demand for services and increase in ridership continues to grow (see figure 2). For example, the increase in consumer demand in the peak season winter months (December, January, and February) ridership, increased over 34 % with 19,803 riders, compared to the previous year's (2014/2015) 14,716 riders. Because of the demand, Express service runs were supplemented with three additional runs during holidays, as well as peak season winter months on weekends.

This year's milestones:

- This was the highest ridership year to date – first time exceeding 50,000 rides with 52,126 riders in the 2015/2016 fiscal year. Ridership in the previous year totaled 40,170.
- Highest number of bicycles transported to date for a year: 4,351 for the 2015/2016 fiscal year.

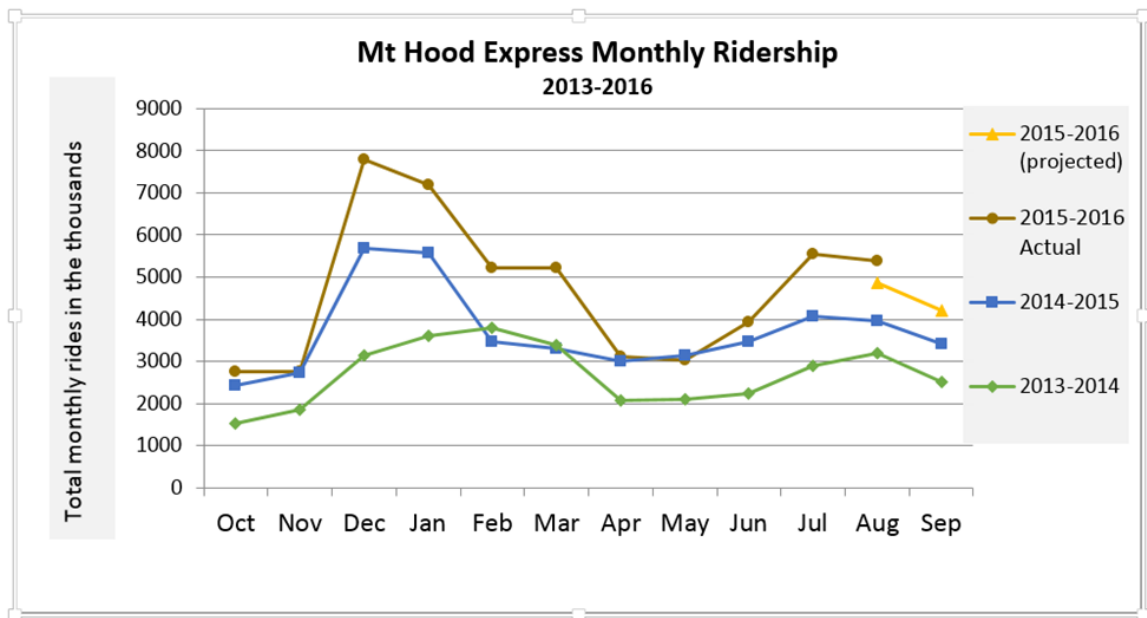


Figure 2- Mt Hood Express Monthly Ridership

SURVEY RESULTS

Surveys were conducted in the summer of 2015 and the winter of 2016 to determine the demographic and trip characteristics of transit riders. Of the 541 people solicited to complete surveys, 33 % responded (this includes the one survey completed in Spanish). During the summer we received 200 responses and in winter we received 179 responses. Survey results are as follows:

Summer: July and August 2015

- The majority of respondents were in the age range of 19 to 54 years. Only 1 % of those surveyed were 60 or older and none of the respondents on the Villages Shuttle indicated they were 60 or older. The primary trip purposes were for recreation and work. Most passengers use Mt. Hood Express either because they do not drive or the service is convenient.

- The primary destination for riders was Timberline Lodge with nearly 50 % traveling to Timberline. On weekdays, the proportion of respondents traveling for work is lower than weekends.
- Recreation trips are the highest trip purposes on weekdays, as well as, weekends. Many surveyed were choice riders, riders that had at least one other transportation option, with 44 % saying they had a vehicle available to them (either as a passenger or as a driver) for this trip, and 62 % of respondents being licensed and able to drive.

Winter: January 2016

- The majority of respondents were in the age range of 18 and 35 years. Only one % of those surveyed were over the age of 65.
- The primary trip purposes were for recreation and work. The primary origin for riders was Sandy (about 40 %) and Mt. Hood Villages (about 20 %).
- The primary destination for riders was Timberline Lodge (about 50 %). Many survey respondents were choice riders, but elected to ride the bus, with 40 % saying that they had a vehicle available to them (either as passenger or as a driver) for this trip and 63 % of respondents being licensed and able to drive.

Impacts of Public Transit in the Mt Hood Region



The Mt Hood Express represents an important link to regional public transit throughout the tri-county region and beyond. Anecdotally, we have received inquiries from visitors as far away as Australia visiting our area and the bus service represents an important node of transportation for visitors to go from the Portland airport or other origin points to destination points on the mountain. With our coordination

with the City of Sandy's service, we provide seamless, seven day per week commuter service as well as additional shuttle service for local residents during weekdays. Mt Hood Express supports one of the most popular tourist and recreation sites in Oregon, providing considerable economic incentive for increased accessibility by public transit.

Highway 26 is notorious both for congestion and for safety issues. The Mt Hood Express has a positive impact on this important transportation route in the following ways:

- In January 2016 alone, 277 Mt Hood Express transit trips replaced 2,789 private trip, based on an average of 2.5 people per car.
- Improve environmental quality due to less vehicles miles traveled. With Mt Hood Express ridership growth rates on the rise, so too will the number of miles traveled on Oregon

highways. According to ODOT's Oregon State Highway 2015 Vehicles Miles Traveled Report, there were over 55.7 million more miles traveled in 2015 than in 2014 on Clackamas County highways. Increasing miles driven on Oregon's highways have been the trend for the last eight years with the exception of 2013 being in close concurrence with 2014.

- Alleviates congestion along US 26 by providing four Park and Ride locations. It also addresses issues of parking capacity in Government Camp, Ski Bowl and Timberline.
- Relieves the need for travelers to pull over in designated travel lanes between mile point 47.5 and 48.5 on US 26 to chain-up. Needing to pull over combined with not knowing how to use the chains properly can be a safety hazard.

Recommendations looking forward

Starting this winter, with funding from the State of Oregon, weekend service will be added to Village Shuttle routes. This will aid in increasing resident's mobility options in their Mt Hood communities. We continue to conduct outreach in the communities where the Villages Shuttle routes run, especially for elderly and people with disabilities in order to make sure this population not only has access to services, but are able to utilize the service as well. Continued expanded service for the Mt Hood Express runs will help keep up with high winter season rider demand.

Looking forward, Mt Hood Express Implementation Report recommendations will be explored. Topics to be explored are, but not limited to, future governance, operations, and sustainability options of the Mt Hood Express transit service.

Clackamas County project contacts:

Teresa Christopherson
Social Services
TEL: 503-650-5718
teresachr@clackamas.us

Margaret McNamara
Social Services
TEL: 503-650-5758
McNamara@clackamas.us

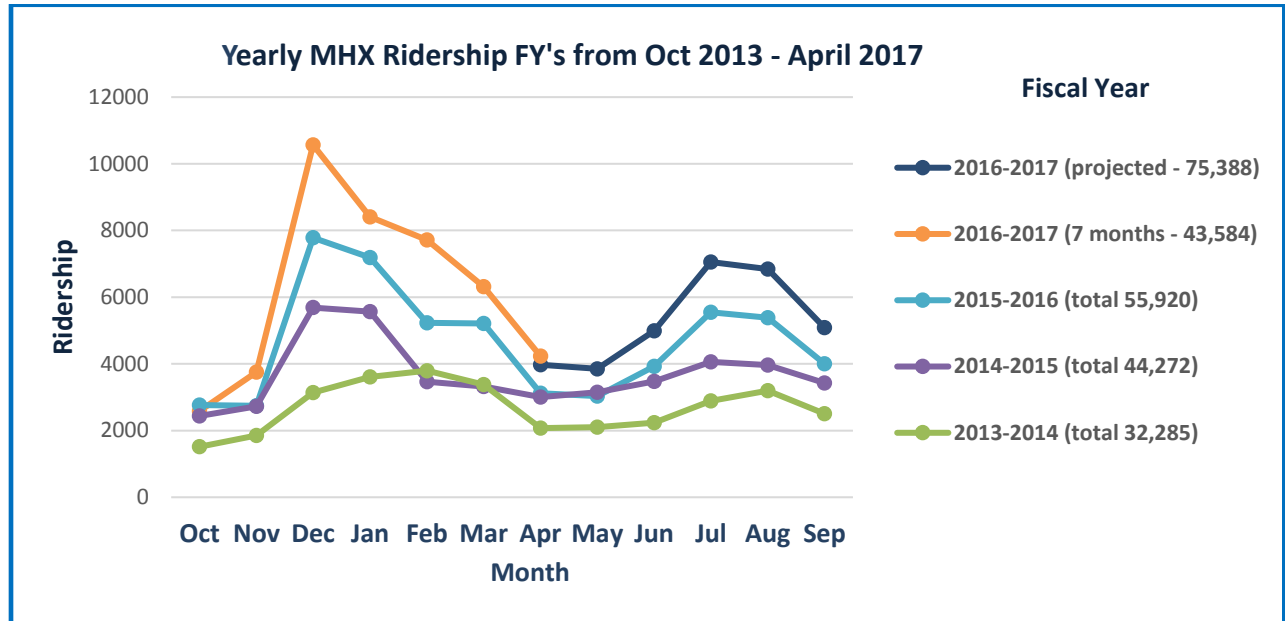


www.mthoodexpress.com



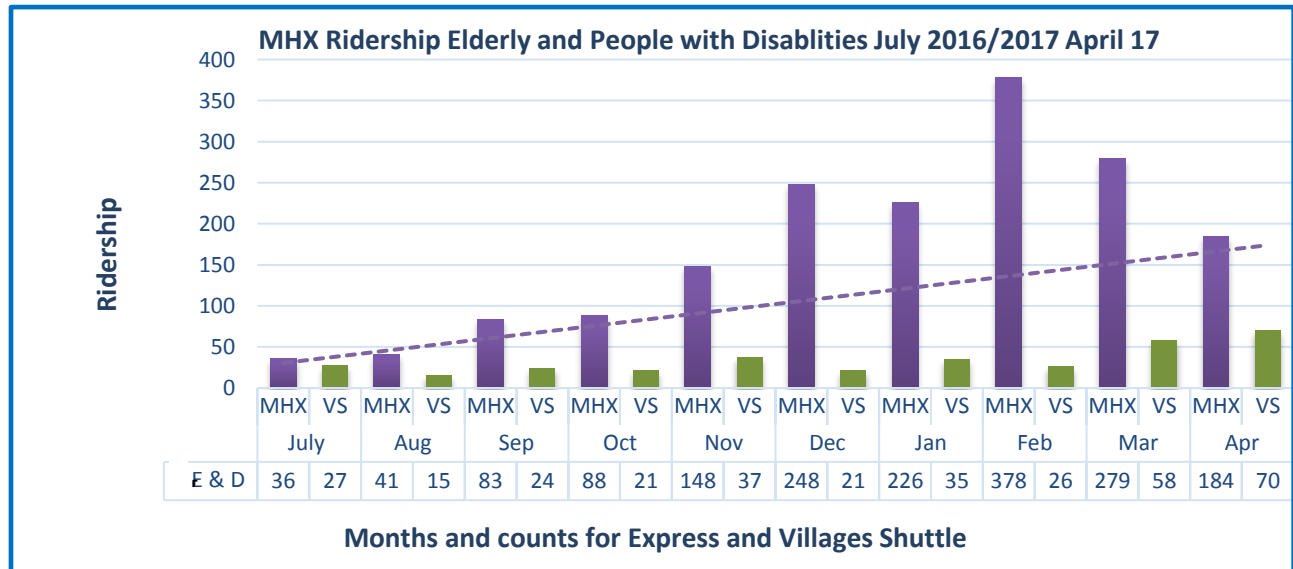
Ridership

As of April 30, 2017 we are experiencing a 27% increase above projections for fiscal year 2016/2017 (Oct–Sept). See chart below.

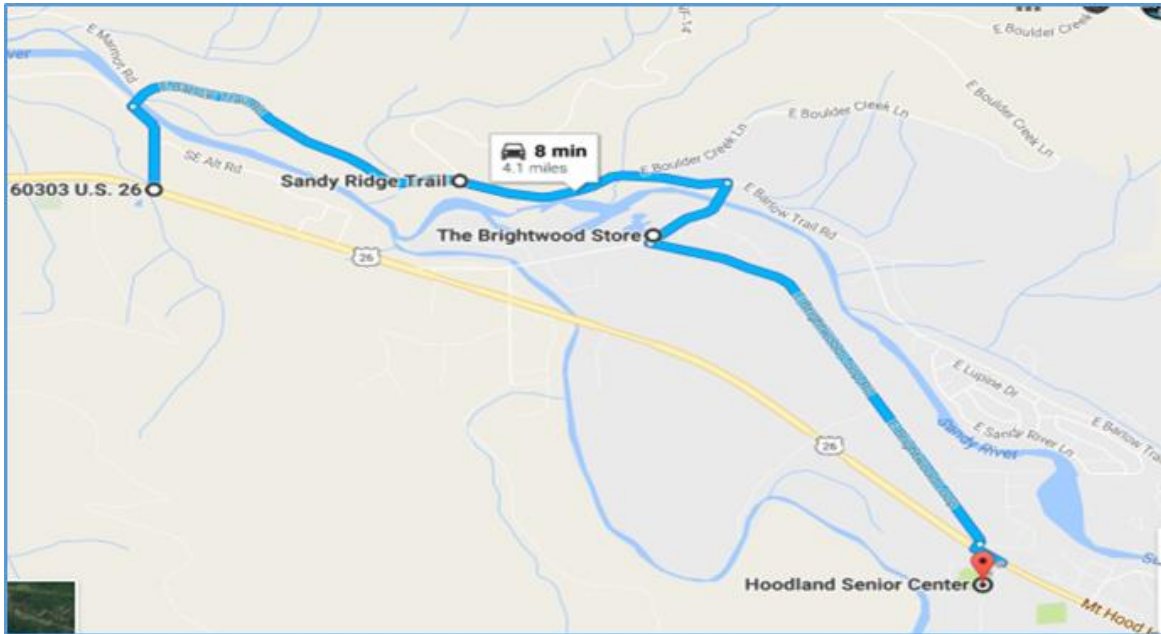


Villages Shuttle updates

Weekend service began last December thanks to the support from ODOT Special Transportation Funds and community support. In the chart below you can see a gradual uptick in ridership from the elderly and people with disabilities as a result of weekend service. In addition the Villages Shuttle outreach and surveys conducted last October concluded there is a direct correlation with increased Villages Shuttle and Express ridership due to transfers.



Starting Memorial Day the Villages Shuttle will start towing a bike trailer. The new service will deviate to Sandy Ridge Trailhead. It will also stop at and stop at Wildwood BLM Wildwood Recreation site will start Memorial Day weekend. See chart below and schedule on brochure.



MHX on time performance

The average on time performance for current fiscal year is 98%.

Mt Hood Express
Budget projections

Assumptions

- Service model remains identical to current (as of 4/1/17)
- Additional shuttle service is included (weekends)
- 5% increase on all costs except fuel (15% increase built in first year, 8% after that)
- Base shuttle service funds (\$13,700) no longer available
- Contract with Sandy for operations

	17/18 (Fed 18)	18/19 (Fed 19)	19/20
5311 Rural Transit Grant	\$ 106,991	\$ 106,992	\$ 109,667
STF Grant Funds (operations- formula)	\$ 10,609	\$ 10,609	\$ 10,874
5310 Grant Funds (maintenance/repair)	\$ 22,775	\$ 22,775	\$ 23,344
STF Villages (shuttle operations)	\$ -	\$ -	\$ -
County cash match (operations)	\$ 9,500	\$ 9,500	\$ 9,500
County cash match (administration)	\$ 55,000	\$ 55,000	\$ 57,750
STF Disc Village Shuttle weekend	\$ 25,000	\$ 26,500	\$ 31,080
FLAP	\$ 208,613	\$ 230,919	\$ 252,441
Private Match	\$ 55,000	\$ 60,000	\$ 60,000
Fares	\$ 90,000	\$ 94,500	\$ 99,225
Total revenue	\$ 583,488	\$ 616,795	\$ 653,881

Operations:	(calculated with 5% annual growth)	17/18 (Fed 18)	18/19 (Fed 19)	
Contracted service		\$ 365,719	\$ 384,005	\$ 403,205
Fuel		\$ 74,391	\$ 80,342	\$ 86,770
Maintenance and repairs		\$ 37,445	\$ 39,317	\$ 41,283
Insurance		\$ 11,655	\$ 12,238	\$ 12,850
Facility Rental		\$ 8,000	\$ 8,000	\$ 8,000
Administration/project management		\$ 66,050	\$ 66,603	\$ 69,923
Misc. expenses		\$ 5,500	\$ 6,500	\$ 2,500
Contingency at 2.5%		\$ 14,728	\$ 15,503	\$ 16,322
Total expenses		\$ 583,488	\$ 612,508	\$ 640,853

	\$	-	\$	4,287	\$	13,029
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Mt. Hood Express



Update and IGA with the City of Sandy, June 2017

MHX History



- Mountain Express started in 2005 by local citizens
- Clackamas County Social Services Division assumed project management role in 2005
- Mt Hood Express service started in October, 2013 with award of Sarbanes Transit in Parks and Federal Lands Access Program (FLAP) grants
- FLAP grant renewed for three more years in 2017 (until Feb. 2021)

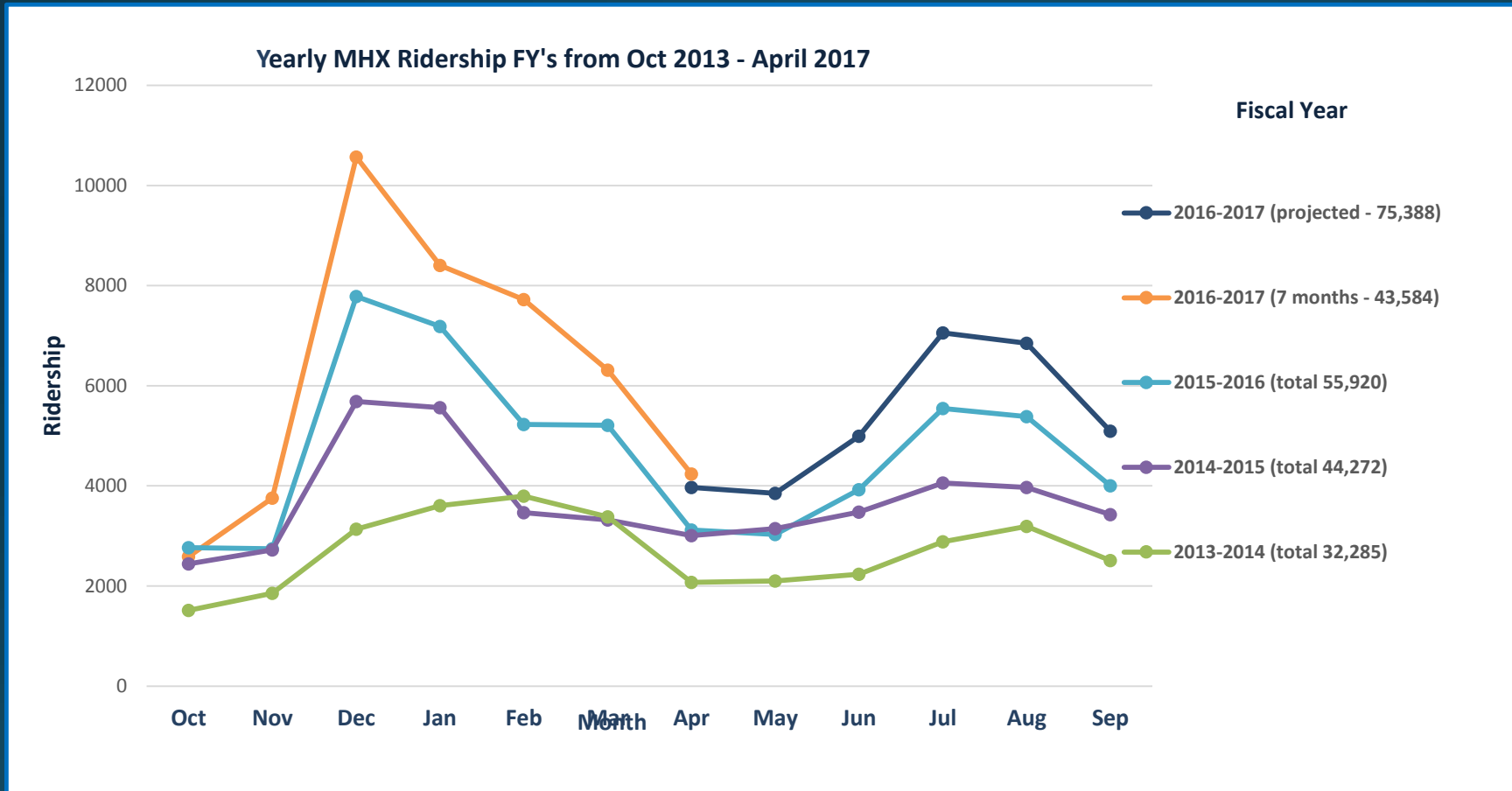


MHX Services

- All services operate seven days per week
- Villages Shuttle (providing service between Sandy and Rhododendron) runs three times per day
- Express service to Government Camp and Timberline runs 6 times daily in summer and 7 times daily in winter
- All buses are fully accessible and equipped with trailers or ski boxes
- Recent changes: route change to Shuttle, winter pilot project



MHX Ridership



Mt Hood Express Planning



- Grant awarded in 2015 for planning- governance and sustainability of funding
- Recommendations included:
 - Move MHX to another County department (DTD)
 - Seek additional voluntary contributions/private partners or add a resort fee or other fee structure to offset loss of FLAP funding
 - Considered but not recommended for short term implementation- transit district, TMA, additional fees or fare increase
- Service expansion options:
 - More frequent service if funding is available
 - Services to Warm Springs, Hood River and Mt. Hood Meadows

Partnership with City of Sandy



- City of Sandy to hire two staff
- Assume majority of responsibility for day to day operations, reporting and other administrative functions associated with MHX
- Already operating transit services from same location and with same operator- economies of scale
- Clackamas County to continue with fiscal stewardship of project and support long term planning and financial sustainability goals