

KernCOG

Regional Rural Transit Strategy

Final Report

August 2003



Table of Contents

	PAGE
EXECUTIVE SUMMARY	1
Overview	1
Administrative Responsibility	2
Sharing Costs for Transit	4
Governance	5
Service Planning.....	7
Marketing.....	10
Moving Toward Consolidation	12
Conclusion.....	13
CHAPTER 1. INTRODUCTION	1-1
Regional Rural Transit Strategy	1-1
Overview of Report.....	1-2
Key Findings from Previous Reports.....	1-3
Conclusion.....	1-8
CHAPTER 2. CONSOLIDATION STRATEGY	2-1
Introduction	2-1
Transit Consolidation Goals.....	2-1
Why Consolidate?	2-2
Concerns about Consolidation.....	2-5
Topics for Consolidation	2-6
CHAPTER 3. GOVERNANCE	3-1
Introduction	3-1
Policy Board Representation.....	3-4
Summary of Policy Board Options.....	3-10
Next Steps.....	3-12
CHAPTER 4. SERVICE STRATEGY	4-1
Short-Term Transportation Strategies.....	4-1
Consolidated System Service Plan	4-11
Next Steps.....	4-14
CHAPTER 5. MARKETING	5-1
Introduction	5-1
Immediate Opportunities for Coordination: Comprehensive Information Resources ...	5-2
Consolidation of Transit Services: Development of a Marketing Strategy	5-5
Next Steps.....	5-9

Table of Contents *(continued)*

	PAGE
CHAPTER 6. ADMINISTRATIVE RESPONSIBILITY	6-1
Current Administrative Structure and Responsibilities	6-1
Organizational Models.....	6-1
Lead Agency Options	6-1
Potential Administrative Cost Savings	6-6
Next Steps.....	6-9
CHAPTER 7. COST SHARING.....	7-1
Overview	7-1
Current Cost Sharing Arrangements	7-1
Cost Sharing Arrangements in Other Counties	7-3
Short-Term Alternatives: Funding for Kern Regional Transit’s Intercity Services.....	7-3
Long-Term: Consolidation	7-6
Next Steps.....	7-6
Uniform Fare Structure	7-7
CHAPTER 8. IMPLEMENTATION.....	8-1
What is Necessary to Implement Consolidated Service?.....	8-1
Public Support: When to Seek it and How to Use it	8-2
Procedural Steps.....	8-3
Transition of Administrative Responsibility	8-10
Conclusion.....	8-10
APPENDIX: RECOMMENDED SERVICE PERFORMANCE STANDARDS	A-1
Efficiency Standards.....	A-1
Efficiency Standards Tools for Kern County	A-1
Service Reliability Standards.....	A-3
Recommended Service Design Standards	A-5

Table of Figures

	PAGE
Figure 1 Key Benefits of Consolidation for Transit Users	14
Figure 1-1 Key Service Alternatives by Sector	1-6
Figure 2-1 Qualitative Benefits of Consolidation for Transit Users	2-3
Figure 2-2 Qualitative Benefits of Consolidation for Transit Operators and Local Jurisdictions.....	2-4
Figure 3-1 Administrative Staff and Policy Board Structure – Other Counties.....	3-3
Figure 3-2 Current Kern County Board of Supervisors	3-5
Figure 3-3 Current Kern COG Representation.....	3-6
Figure 3-4 Kern County Population Share	3-7
Figure 3-5 Policy Board Representation: Population Based = 13 Members	3-8
Figure 3-6 Transit Service Expenditures – Countywide.....	3-9
Figure 3-7 Policy Board Representation – Dollars Devoted to Transit.....	3-10
Figure 3-8 Proposed Representation by Policy Board Options.....	3-11
Figure 4-1 Proposed Kern Regional Transit Intercity Service Enhancements.....	4-2
Figure 4-2 Proposed Kern County Volunteer Driver Program Characteristics	4-4
Figure 4-3 Volunteer Driver Reimbursement Program Summary	4-5
Figure 4-4 Subscription Service Costs	4-7
Figure 4-5 Proposed Flexroute Services	4-9
Figure 6-1 Administrative Structure – Transit Services in Kern County.....	6-2
Figure 6-2 Organizational Models	6-3
Figure 7-1 Current Cost Sharing Arrangements.....	7-2
Figure 7-2 Cost Sharing Formulas in Other Counties.....	7-4
Figure 8-1 Consolidated Service Implementation Diagram.....	8-9
Figure A-1 Kern County Transit Performance Standards.....	A-2
Figure A-2 Summary of Recommended Service Quality and Reliability Standards.....	A-4
Figure A-3 Kern County Intercity and Community Fixed Route Service Design Standards	A-6
Figure A-4 Dial-a-Ride Service Design Standards.....	A-8

Executive Summary

Overview

The Kern Council of Governments (Kern COG) initiated a process to evaluate alternatives to its current network of rural transit services. This effort, the Regional Rural Transit Strategy, was inaugurated in the spring of 2002 by Nelson\Nygaard Associates, working with staff from Kern COG and a project advisory committee representing transit providers and social services throughout Kern County. Prior to this final report, two interim reports were produced identifying existing services and a variety of service, administration and coordination alternatives. Through refinement of the alternatives, this report outlines a series of recommended steps for Kern County's transit providers, describing a process for enhanced coordination, as well as the eventual consolidation of services within the county.



Bringing staff and policy-level representatives to the table: Moving toward consolidation in Kern County will be a process of negotiation and compromise.

The decision to move toward consolidation requires a rethinking of how transit services are operated, administered and marketed in Kern County. Travel in Kern County is primarily by car, but as the population has increased and the county has seen higher levels of congestion and air pollution, other transportation solutions have become increasingly important. Transit can do more than provide a transportation alternative. A strong transit network can improve the quality of life in Kern County by connecting people with jobs and services, as well as attracting new jobs and services to the region. A solid countywide transit infrastructure can make it easier for people to transition from welfare to work. It can offer an alternative for tourists to visit Kern County's mountains, deserts, wildlife reserves and cities, and provide efficient public transit access to future high-speed rail service.

In addition to economic and quality-of-life benefits, consolidation provides an opportunity to improve the efficiency and effectiveness of services that are available, allowing for a more seamless fare structure and better transfers and connections for users. It also affords the expansion of public awareness – one transit system operating throughout the rural areas of the county, as well as into Bakersfield. This plan assumes that Golden Empire Transit (GET) will continue to function as a stand-alone transit district. Kern County can find equitable solutions for sharing the costs of rural transit service and potentially reduce the overall expense of administering, marketing and operating transit service.

Apprehension about significant change is reasonable. However, with so many potential benefits to be derived from a single rural transit operator in Kern County, eventual consolidation merits the interest of the

stakeholders. A process that allows social service agencies, rural/small city transit operators and political leaders to work together to identify policy priorities and small coordination steps will make the prospects of consolidation more successful.

Several areas of focus will comprise the consolidation process in Kern County. Each of these are reviewed in the following sections:



Key components for consideration: The report identifies issues to review as part of Kern County's consolidation process.

- Administrative Responsibility
- Sharing Costs for Transit
- Governance
- Service Planning
- Marketing

Administrative Responsibility

Transit system administrators in Kern County perform a wide array of functions. They collect and report transit data, write grant applications and secure transit funds from Kern COG, oversee day-to-day transit operations, manage contracts and/or employees, perform marketing functions, purchase vehicles, represent their transit system at county meetings, etc. Currently, the largest rural transit operator in Kern County, Kern Regional Transit (KRT), is administered through the Kern County Roads Department, with four staff representatives overseeing the system's services and managing the operating contract with First Transit. For the smaller transit systems in the county, transit administrators include Parks and Recreation Supervisors, Finance Directors, City Managers – individuals who assume the oversight of local transit operations as one of many responsibilities.

If Kern County's transit providers were to enhance coordination or consolidate all or some of its transit services and functions, two key decisions will need to be made with regard to administration and oversight of rural transit:

- What is the appropriate organizational model for Kern County's transit system?
- Who should administer the transit system?

Organizational Models

Several organizational models may be relevant and appropriate for Kern County, depending on the level of coordination implemented. For informal cooperation and more formalized coordination, establishing a

transit consortium or drafting a Multiple Operator Agreement would be appropriate first steps. To move incrementally toward a fully consolidated rural transit system, administrative consolidation or sub-regional consolidation are potential options.

Under a fully consolidated rural transit system, all or nearly all local and regional transit services would operate under one single agency. This would require a single administrative structure that oversees all transit services in a way that allows it to operate as one system. Under a fully consolidated system, one administrative body would be responsible for management and oversight of day-to-day operations. Two organizational options are identified for Kern County:

- A Joint Powers Agreement (JPA) or
- A Transit District

Since a longer-term goal is full consolidation, the JPA model would be the most appropriate organizational option for Kern County.



Decision-making & participation: Political support at all levels will be essential for development of a consolidated transit system in Kern County.

Lead Agency

Consolidating the administrative functions of a transit system is expected to result in countywide administrative cost savings.¹ Assuming the JPA is the preferred model in Kern County, the key question would be to determine who would be the lead agency and whether it should be an existing agency in the county or a new agency. Three practical options for the administrative or lead agency are as follows:

- Kern COG
- Kern County (with three possible departments as the lead)
- New Agency (JPA)

Administrative Responsibility Next Steps

There are two recommended steps that Kern County should pursue before making a decision about the administration of a consolidated transit system.

First, it is important to **determine the level of interest for a potential lead agency**. It will be necessary to understand which agency or agencies are truly interested and willing to assume this new role. Based on the level of interest, the options should be narrowed down to one or possibly two agencies.

¹ Anticipated cost savings would need to be calculated as the county transit operators begin the process of moving toward consolidation.

Second, Kern County's transit providers will need to **develop and refine cost savings projections**. Narrowing down the options for a lead agency will allow for more accurate projections of annual operating cost savings under a consolidated transit system.

Sharing Costs for Transit

Kern County currently has an unusual practice for funding its own intercity transit service: local jurisdictions do not pay a share of the costs.² Based on the practices in six other California counties, it is reasonable and appropriate to explore cost-sharing arrangements for intercity transit services in Kern County.

Currently, KRT is the largest rural system in the County and provides valuable intercity services. With an annual operating cost of about \$1.6 million and fares hovering around 16 percent of costs, KRT has a funding obligation of roughly \$1.4 million. Since this a regional service enjoyed by residents countywide, policymakers may deem it fair and equitable for all jurisdictions of Kern County to share in the costs. This would mean that each city might have to contribute a higher percentage of its LTF funds toward transit. The result, however, is that local residents would have continued access to countywide public transit services. At the same time the cities would have a vested interest in the level and quality of regional transit service.

Funding Formulas

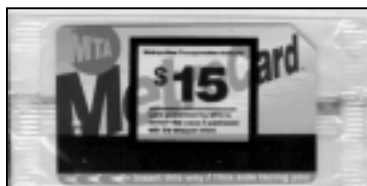
Determining whether or not local jurisdictions will contribute to funding intercity services is a challenging first step for staff and policymakers alike. If there is agreement that local contributions are appropriate, moving forward will require looking at possible funding formulas. Selecting the most equitable and appropriate funding formula for Kern County will require dialogue and compromise.

Four different funding formulas are presented, although different "hybrid" alternatives could be derived through a negotiation process. Kern County's jurisdictions could determine that local contributions to intercity transit should be based on:

- Population within the jurisdiction,
- Transit service hours within or between jurisdictions,

² The exception is one intercity route that connects Ridgecrest with California City and the rest of the KRT network.

- Transit service miles within or between jurisdictions, or
- Ridership (boardings).



Easy fares and transfers: Under a consolidated rural transit system, riding the bus is more convenient, with a consistent countywide fare structure and transfers between services.

Cost-Sharing Next Steps

The recommended steps in evaluating funding formula options and selecting an equitable approach for funding intercity transit are as follows:

- **Collect data and “run” the formulas.** It is impossible to select an equitable funding formula in a vacuum. One formula may seem fair and equitable on the surface but when the numbers are applied, the results simply do not “feel right.” After the numbers have been applied to each formula, they should be evaluated against a set of objectives and standards.
- **Develop and apply criteria.** Because selecting an equitable formula is more of an art than science, it is important to have a set of both qualitative and quantitative criteria. Some criteria to consider include:
 - ❖ Is this formula easy to administer?
 - ❖ Does it negatively impact any jurisdiction?
 - ❖ Does it favor any jurisdiction?
 - ❖ Is the formula financially feasible for all jurisdictions?
- **Work toward consensus.** Experience in other counties suggests that reaching agreement on a cost-sharing arrangement or funding formula is not easily achievable. It requires “working the numbers” until all parties are comfortable with their fair share and believe the formula is equitable for all participants. To achieve consensus will require that one agency serve in a lead or champion role to keep the process moving in a timely manner.

Governance

For a consolidated transit system, day-to-day operations and staffing decisions can be made at the staff level. Policy decisions must be made by an oversight board with decision-making responsibility.

Currently each of the 12 separate transit services in Kern County has its own policy board. The City Councils serve as policy boards for the city-run services and the Board of Supervisors serves as the policy board for KRT. If transit services in the County were to pursue administrative consolidation, a change in the current policy board structure would be unnecessary – City Councils and the Board of Supervisors would continue to serve as the policy-setting body as they do today. If, however, the

individual rural transit services were to consolidate under one system, a new policy board would be required. This would raise questions such as:

- What is an equitable composition for a policy board?
- What is the proper balance between local and regional interests?
- How many members should sit on a policy board?
- Should members be appointed or elected?

Policy Board Options

Under a consolidated rural transit system, the best policy board options for Kern County are as follows:

- Board of Supervisors (assumes a department within Kern County is the lead administrative agency)
- Kern COG
- A new policy board, which could include:
 - ❖ Representation Based on Population
 - ❖ Representation Based on Transit Expenditures

Determining the appropriate policy board composition is closely tied to a decision about a designated lead agency. These two important administrative decisions are intrinsically linked and will need to be addressed in a coordinated fashion.

Governance Next Steps

The next step in the process of consolidating transit services is to narrow down the lead agency options to one or two and to then identify a corresponding policy board structure. The ultimate decision on a policy board structure should meet the objectives of providing equitable representation for the cities and county and should be approved by the transit operators. The final list of lead agency and policy board options should be presented to the current policy board members for preliminary review and feedback before further refinement.



A good model: Kern Regional Transit provides a comprehensive rural network that can serve as the backbone for a consolidated system.

Service Planning

Putting buses on Kern County’s roads to serve the public is obviously a key objective of providing transit. How well those buses address local and intercity transit needs is the focus of the service planning component of the Regional Rural Transit Strategy.

Transit service needs and operating conditions vary significantly throughout the county. As a result, no single service model is appropriate for all public transportation situations. The Regional Rural Transit Strategy offers both short- and long-term service priorities to build on and enhance the diverse mix of transit/public transportation strategies that have evolved throughout Kern County.

Short-Term (Better Coordination Among Transit Providers)

A short-term service planning approach seeks to provide a broad base of options so Kern County’s transit services can begin to provide more than fixed routes and dial-a-rides alone. Through better coordination, Kern County can begin to manage mobility using an array of traditional and nontraditional strategies.

The proposed strategy reflects a recommended countywide approach, which assigns the most cost-effective service alternative to each transit situation – finding the strategy best suited to various mobility needs, markets, operating conditions and funding capacity. This allows unproductive resources to be reassigned. Primary service improvements recommended for Kern County are as follows:

- **Intercity transit enhancements.** These include improved and streamlined “express” services along the North Kern, Westside, Frazier Park, and Highway 58 corridors. The emphasis of these enhancements is to improve coordination, reduce travel times and increase attractiveness of commute transit services.
- **Volunteer driver reimbursement program.** The focus is to replace three poorly performing services with a lower cost alternative that enhances community participation and development. The services recommended for replacement include the following:
 - ❖ Taft-Fellows-Derby Acres-McKittrick
 - ❖ Boron-Mojave
 - ❖ Ridgecrest-Randsburg/Johannesburg

- **Subscription bus services.** Subscription buses allow riders to pay in advance for dedicated commuter bus service, often with funds from private employers offsetting some of the costs. Subscription bus services may be appropriate for commute travel between Lamont/Arvin and the Tejon Ranch Business Park and Laval/I-5 employment concentrations. These could also be developed elsewhere in the county, providing employment connections from Bakersfield to Shafter, or in the eastern part of the county connecting the Antelope Valley with Mojave.
- **Employer/employee sponsored carpools or vanpools.** These could better serve Tejon Ranch Business Park sites for employees outside the communities of Arvin and Lamont. Carpools/vanpools could be a “no-cost” alternative to publicly funded subscription bus services. Kern County should also step up its efforts countywide to encourage ridesharing.
- **Flexroute service.** These streamlined dial-a-ride/deviated fixed route services are recommended to improve productivity and effectiveness – as well as reduce trip “denials” – on the Taft, Frazier Park, Tehachapi, Rosamond, and Kern River Valley dial-a-ride services. A flexroute service may also be appropriate to replace portions of the Kern River Valley fixed route service.

Consolidated System Service

As Kern County’s providers move toward consolidation, it will be important to develop a service plan that can accommodate different local requirements, intercity services and a variety of mobility needs. Even though the system may have one identity and one administrative agency, a consolidated system does not imply that “one size fits all.”

The transit system’s policymakers will need to work with lead agency staff to develop a countywide comprehensive set of service performance and design standards and policies. Design standards are critical to safe transit operations and will give policymakers a basis for making decisions about which transit needs are reasonable or unreasonable to meet.

The following considerations aid in the process of developing a countywide consolidated rural transit service plan:

- **Ensure integration of regional and local services.** A comprehensive consolidated plan will afford good transfers between services, with complementary express and feeder services to increase the attractiveness of the overall transit network. It will also provide better potential for systematic countywide coordination with services in the neighboring counties (Tulare County Transit, Antelope Valley Transit and Santa Clarita Transit),



Consolidation benefits: All rural buses in Kern County would be recognizable as part of a single system. *(The photos illustrate an example, but are not meant to suggest a design or name for the system.)*

as well as potential for systematic coordination with Amtrak, MetroLink, Greyhound and future high-speed rail service.

- **Plan for services without regard to jurisdictional boundaries.** Planning for consolidated service will allow the transit network to minimize the duplication between local and regional services where routes overlap. The anticipated outcome would be a reduction in service hours and costs, resulting in improved productivity. It would also allow unproductive services to be reassigned.
- **Establish countywide service and funding priorities.** Focusing funds on services that serve a broader population will result in a greater benefit countywide. Countywide planning also allows for more effective identification of priority markets. A countywide policy board would have the ability to enforce performance standards. It could take a holistic look at the mix of services provided throughout Kern County and determine when poorly performing services should be modified or discontinued – or when productive services should be enhanced.
- **Oversee a greater number of transportation options.** Under consolidation, there is a greater potential to develop more cost-effective transportation alternatives for a wide range of community needs and operating conditions. Many smaller agencies do not have the resources to review and develop cost-effective alternatives. Under consolidation, there is enhanced potential for a more systematic countywide coordination of social service agency trips.

Service Planning Next Steps

The recommended steps in modifying and planning services for Kern County's short- and long-term transit needs are as follows:

- **Identify and build consensus on countywide service policies and standards.** Kern County's transit providers should work with policymakers to define quantifiable service standards that can be used as a basis for planning, funding and modifying transit services.
- **Review and revise services.** Based on recommendations in the Regional Rural Transit Strategy, initial elements of a better-coordinated transit system should be implemented and then evaluated. Minimizing duplication, integrating intercity and local services, and implementing transportation alternatives such as vanpools or volunteer driver programs in the short-term will facilitate the eventual move toward consolidation.

- **Plan for consolidation.** As service/route changes are made and implemented, planners should identify operational changes that would further improve efficiency. For example, under the current mix of systems, a bus used for intercity service might have a 30-minute layover at the end of the route. Under a consolidated system, the same bus would optimally provide local trips during those 30 minutes, dropping off and picking up passengers for its return intercity trip. These are the types of planning efficiencies that can serve as an effective basis for a consolidated system service plan.

Marketing

Marketing is one method of tying together all of the other components of the Regional Rural Transit Strategy. It benefits transit services by providing information to current and potential riders, putting policies into print and making services user-friendly. Under a consolidated rural system, marketing is a broad umbrella for information, branding, and customer service – a tool to make everything that is part of the consolidated system reflect its countywide coverage and efficiency.



Success in other California communities: From administrative consolidation in Butte County to full consolidation of other systems (i.e., *Ventura County (Paratransit), Merced County, Yolo County*), others provide good models for rural transit in Kern County.

Short-Term Marketing Coordination

In relation to transportation coordination, marketing and public information play any number of roles, from building public support for a coordination effort to attracting riders to the coordinated service. Depending on the level of coordination and the extent of the services being provided, coordination can provide several marketing-related benefits. Nevertheless, the most important priority in the short term, based on the analysis and input from the many stakeholders interviewed early in this process, is to improve the consistency and availability of public information in Kern County. An immediate opportunity for enhanced coordination **is the development of a single informational resource about transit services** (a comprehensive information brochure or web site).

Because GET marketing staff has expressed interest in providing assistance for countywide rural transit marketing, GET would perhaps be the best lead in the short-term if the agency has the marketing staff to coordinate the public information process. For the longer term, the responsibility should be transitioned to an organization with direct rural transit planning and operating experience. Either Kern COG or KRT, depending on staff availability, would be a logical project leader in this area.

Marketing for a Consolidated Rural Transit System

The recommended short-term coordination effort puts into place basic marketing elements that can easily be simplified and further built upon under a consolidated system. The role of marketing under a consolidated system is to create a unified look for the system, present a comprehensive network to the public, provide a single telephone information and/or reservations number, etc. Thus, marketing for a newly consolidated transportation service is a large and complex topic. In the process of moving toward consolidation, Kern County's transit providers are encouraged to work together to develop a comprehensive marketing plan. Key steps of a consolidated system marketing plan will include the following:

- Identifying the audience for the marketing plan.
- Conducting a marketing resource assessment looking at current marketing efforts, Kern County's various transportation markets, job responsibilities, and existing marketing coordination efforts.
- Identifying current or potential challenges for marketing a consolidated rural system in Kern County. These may include marketing expectations for the consolidated transit agency, agency responsibilities and oversight, costs for marketing and understanding the current users.
- Developing goals and objectives for marketing and public information for Kern County's consolidated rural transit services.
- Identifying transit target markets.
- Detailing the marketing activities required to meet the newly consolidated system's objectives. These might include creating a new look for the overall system, outreach activities, needed information resources, transit system amenities, an information distribution plan, and advertising.
- Identifying which individuals and which agencies will be responsible for implementing the marketing actions.
- Determining a process for evaluating the success of Kern County's consolidated system marketing effort.

Marketing Next Steps

Kern County's transit providers are encouraged to focus on short-term marketing priorities. The key steps to move forward with a more comprehensive marketing effort are as follows:

- **Identify a lead organization or individual to oversee and facilitate the process.** This could be a representative of any of Kern County’s transit agencies (GET has indicated some interest in the role), Kern COG or Kern County. An outside consultant or other organization could also oversee this effort.
- **Build support among transit providers.** Kern County’s rural transit providers need to support the process by attending meetings, providing information for the materials and working together to develop informational materials.
- **Establish regular meetings.** Bring transit providers together and assign responsibilities and deadlines for different tasks. Use the meeting as a means to discuss other coordination issues and to evaluate the marketing effort. Kern COG’s Transit Operators Group may be an appropriate forum for the discussion.
- **Develop content and materials, web site.** The process of agreeing on the various components of any shared brochures and web sites, creating the designs and then distributing (or posting) them may take several months.



The benefits should outweigh the risks: Good transit, potential cost savings, equitable cost-sharing and an emphasis on customer service will minimize concerns about the loss of local control.

Moving Toward Consolidation

For the consumer, there are few disadvantages of consolidation. Seamlessness, transferability, coordinated fares and services – all of these are benefits. Nevertheless, centralizing planning, operating and customer service functions lead to concerns about accountability and local participation.

The primary concerns about consolidation that local transit operators expressed in stakeholder interviews and through the Project Advisory Committee involve three key elements:

- The potential loss of local involvement in planning and administering the service.
- Transit no longer reflecting a community’s unique identity and character.
- A loss of local control in policymaking and oversight.

Indeed, consolidation takes many of the day-to-day transit functions out of the hands of local communities. Because so many local transit operators have established relationships with their customers and can offer a unique familiarity and flexibility, there is concern that this element of service will be diminished.

Many of the County’s transit operators, particularly those in the smallest communities, expressed a willingness to move toward consolidation as long as quality, personalized service would still be provided within the community. Some administrators noted that taking transit off their list of responsibilities would allow them to focus on other priorities.

Would a dispatcher located in Bakersfield really be able to understand an individual’s needs in California City or Shafter? Under a consolidated system, could transit service be extended into the evening to accommodate a special festival in McFarland or Ridgecrest? Is it possible for Tehachapi or Arvin to increase their share of funding for transit in order to get more frequent service or extended local service hours? These are important issues that need to be identified and deliberated in the process of moving toward consolidation. The consolidation process is essentially about coordinating and negotiating details around goals and objectives that are supported by specific policies and service standards. Agreeing on these goals and objectives, and then working to identify countywide service standards and policies should be among the first steps in the consolidation discussion process. The ultimate plan for consolidation – developed by staff and policymakers – would address each of these concerns and others that are identified by local jurisdictions and transit users.



Consolidation is a process: It will require building consensus and negotiating tough decisions over an extended period of time.

Conclusion

The advantages of consolidation are far-reaching. The Regional Rural Transit Strategy outlines the requirements for advanced coordination in Kern County and the opportunities and processes for consolidation.

Full consolidation is a process that can require several years to complete. Nevertheless, the many benefits that can be derived from consolidation have made the undertaking worthwhile in many California counties and elsewhere in the U.S. As Kern COG looks ahead to the economic and cultural advantages that come with continued growth, political leaders are also confronted with some of the challenges that accompany it, such as poor air quality and increased congestion.

A more efficient transit network with a single rural transit provider promises an array of advantages – both financial and efficiency-related. The concluding table (Figure 1) illustrates a number of these benefits for transit users.

Figure 1 Key Benefits of Consolidation for Transit Users

	Local Dial-A-Ride Services	Local Fixed Route Services	Intercity Services
Service Without Regard to Jurisdictional Boundaries	Provides timed connections so local dial-a-rides can serve as feeders and distributors for intercity services.	Allows some local fixed route resources to be put into other services because intercity services can become local services when they reach city boundary. For example, intercity service from Bakersfield could operate as a local collector/distributor in Delano.	Streamlines intercity services - they no longer need to do local pickups. For example, in Tehachapi, local KRT intercity deviations could be eliminated.
New Travel Options	Intercity routes can supplement local dial-a-rides, providing limited local routing through some communities. For example, on its way to Wasco, an intercity bus could pick up passengers in Shafter and drop them off elsewhere in town along the route.	Intercity routes can supplement local fixed routes, providing limited local routing through some communities.	Allows for seamless transfers and connections between intercity routes.
Schedule Simplification	Regular service spans and service days provide for reliability and familiarity across all local dial-a-rides.	Local fixed routes operate on consistent headways that pulse with intercity services. Regular frequencies, service spans and service days provide for reliability and familiarity.	Provide for consistent headways that pulse with local services. Regular frequencies, service spans and service days provide for reliability and familiarity.
Ease of Use	<p>Allows for consistent service delivery among communities. A user of the dial-a-ride in Mojave will be able to reserve service in California City and will be familiar with policies and procedures.</p> <p>Provides for coordinated dial-a-ride and fixed route connections.</p> <p>Features single fare, transfer policy, schedule information, and countywide telephone number for transit service.</p>	<p>Provides for coordinated local and intercity service connections.</p> <p>Features single fare, transfer policy, schedule information, and countywide telephone number for transit service.</p>	<p>Provides for coordinated dial-a-ride and intercity route connections.</p> <p>Features single fare, transfer policy, schedule information, and countywide telephone number for transit service.</p>

	Local Dial-A-Ride Services	Local Fixed Route Services	Intercity Services
Marketing Simplification	<p>Makes system easy-to-recognize. Provides for uniform logos, bus design and fare instruments.</p> <p>Marketing information is comprehensive and consistent.</p> <p>Comprehensive customer service is available to rural transit users.</p>	<p>Makes system easy-to-recognize. Provides for uniform logos, bus design and fare instruments</p> <p>Marketing information is comprehensive and consistent.</p> <p>Comprehensive customer service is available to rural transit users.</p>	<p>Makes system easy-to-recognize. Provides for uniform logos, bus design and fare instruments</p> <p>Marketing information is comprehensive and consistent.</p> <p>Comprehensive customer service is available to rural transit users.</p>
Maintaining Important Service Markets	<p>ADA-complementary dial-a-ride services are maintained in communities with local fixed route service. General public dial-a-rides are still available in lower density and small communities.</p>	<p>Allows all key origins and destinations to be served more efficiently.</p> <p>A consolidated service makes transit more attractive to non-riders.</p>	<p>Allows all key origins and destinations to be served more efficiently.</p> <p>A consolidated service makes transit more attractive to non-riders.</p>

Chapter 1. Introduction

The “New Federal Guidelines to Facilitate the Coordination of Human Service Transportation Programs” defines Cooperation, Coordination, and Consolidation as points along a continuum of organizational working relationships:

Cooperation: Working together in some loose association, perhaps focusing primarily on information sharing, in which all agencies retain their separate identities and authorities, including control over the vehicles which they own.

Coordination: Joint decision and actions of a group of agencies with formal arrangements to provide for the management of the resources of a distinct system.

Consolidation: Vesting all operational authority in one agency that then provides services according to purchase of service agreements or other contractual relationships.

In Kern County, transit systems **cooperate**, and in a limited number of cases, **coordinate** their services. Opportunities and strategies to coordinate further and eventually **consolidate** are the focus of this report.

Regional Rural Transit Strategy

Kern COG initiated a process to evaluate alternatives to its current network of rural transit services. This effort, the Regional Rural Transit Strategy, was inaugurated in the spring of 2002 by Nelson\Nygaard Associates, working with staff from Kern COG and a project advisory committee representing transit providers and social services throughout Kern County. Prior to this final report, two interim reports were produced identifying existing services and a variety of service, administration and coordination alternatives. Through refinement of the previous alternatives, this report outlines a series of recommended steps for Kern County’s transit providers, establishing guidelines and a recommended process for enhanced coordination and the eventual consolidation of services within the county.

In many respects, the objectives of this effort have changed as the project has progressed. Based on discussions with transit managers, officials from Kern County’s many local jurisdictions, and transit drivers, initial expectations were that the project would focus on short-term strategies to improve the provision of service in Kern County and offer opportunities for limited coordination. As the study progressed, **Kern COG and various stakeholders recognized that a necessary element of a successful Regional Rural Transit Strategy for Kern County would be the consolidation of some or all services, with the exception of Golden Empire Transit (GET).**

Overview of Report

This report expands upon concepts introduced in Report 2 (November 2002), providing short-term strategies for service changes and coordination among transit providers. The primary focus of this report, however, is on the consolidation of transit services in Kern County. Throughout this report, reference is made to a potential consolidated transit system. This single-system concept for Kern County refers to rural operators – all providers except GET. It is assumed that GET would continue to operate service in metropolitan Bakersfield regardless of the consolidation of other providers.

The previous report identified the three areas of focus for a Regional Rural Transit Strategy: service strategy, administrative and funding strategy, and coordination strategy. While these remain critical elements of an overall Regional Rural Transit Strategy, these elements have been revisited and redefined to better meet the changing objectives of this study.

Service Strategy

The service strategy is about the distribution of transportation services, frequency, service span and route/service structure. While the previous report identified a number of short-term service modifications, the focus of the service strategy in this report is, for the short-term, on the implementation of alternative service strategies such as a volunteer driver program, subscription bus service, and the introduction of flex-route services. After reviewing these short-term service improvements, we look at recommendations and considerations for a service plan for a consolidated transit system. This is presented in Chapter 4.

Administrative and Funding Strategy

In the previous report, the Administrative and Funding Strategy looked at alternative structures for managing and overseeing Kern County's many transit services. Stakeholders and other members of the Project Advisory Committee expressed an interest in how these alternatives might translate to a higher level of coordination or potential consolidation. In this report, we review administrative structures and cost-sharing alternatives for consolidated services and recommend the next steps necessary to carry these concepts forward. These play an integral role in the development of a consolidated transit system.

Coordination Becomes Consolidation

Coordination is a broad term to describe various transit providers working together for a common goal. Kern County's transit providers have identified many opportunities for better coordination. Short of consolidation, best opportunities for successful coordination projects by Kern County's transit providers include marketing coordination, service coordination and fare coordination.

In the short-term, enhanced coordination will be necessary to bridge the gap toward consolidation. Enhanced coordination will require much greater participation by the local

transit providers than is currently done (active participation in Transit Operators' Group meetings, agreeing to various conventions for tracking, collecting and reporting transit data, etc.). Successful coordination will also require more aggressive oversight by Kern COG.

Implementation of a Consolidated Transit System in Kern County

Small-scale coordination can be challenging enough when working with many jurisdictions with unique local concerns and priorities. Full consolidation of transit services, while potentially providing many benefits (administrative cost savings, better access to information, less duplication of services, etc.), is a complex process requiring participation by transit staff and political leadership. The consolidation implementation process requires looking at a full range of administrative, funding, policy and service issues and working through the often complex and contentious details. While this report identifies a process for Kern County, the successful execution of the process will rely on the dedication of policymakers and staff that are committed to a simplified, consolidated rural transit system in Kern County.

Key Findings from Previous Reports

Kern County Transit Systems

With regard to covering the county with transit options, Kern County is far ahead of many of its peers. However, within the realm of fare and route coordination, Kern County's transit network is very decentralized, has much less regional oversight, and has a mix of different service hours, eligibility requirements, fares and access to information.

Kern County provides extensive transit services throughout its large service area. Local transit services are available in almost all communities and intercity transit services connect communities. Kern Regional Transit (KRT) is the county's second largest operator, with 12 intercity routes and one local fixed route in Lamont. Kern Regional Transit also operates dial-a-ride services throughout the county in populous unincorporated areas. Arvin, California City, Delano, McFarland, Ridgecrest, Taft, Shafter, Wasco, and Tehachapi each provide local dial-a-ride transit services for their residents and adjacent urbanized areas of Kern County. Bakersfield's GET is the largest system in the county, operating 18 fixed routes and complementary dial-a-ride services for ADA-certified persons.

In addition to the services within the county, Kern County's services connect with other transit services in the region, including Tulare County Transit, Inyo-Mono Transit, Metrolink, the Antelope Valley Transit Authority, and Santa Clarita Transit.

Many Kern County transit operators receive a substantial portion of their funding from Transportation Development Act Funds, which consist of Local Transportation Funds (derived from ¼ cent of the State sales tax) and State Transit Assistance Funds. Federal funds, apportioned by the Federal Transit Administration, are also used to pay for operating,

capital, and planning expenditures. Transit agencies have a variety of other funding sources. Compared with transit systems in other counties, Kern County is unique in that local jurisdictions are not required to contribute to the cost of providing intercity transit services. In most counties, operators have a cost-sharing agreement to fund intercity service.¹

Kern County's rural operators have no transfer or revenue-sharing agreements, no service coordination policies, and no regional service standards. There is also very limited public information about rural transit services in Kern County.

Kern County Population

Providing transit in Kern County is about serving widely dispersed transit-dependent populations. As California's third largest county, Kern County has three distinct geographic sub-regions – desert, mountain, and agricultural lands. In total, Kern County is made up of 11 incorporated cities and 41 unincorporated communities. While the greatest population concentration is in Bakersfield, dense communities are found in the western part of the county (especially Delano, Arvin, Wasco and Shafter), while vast distances separate small communities in the central and eastern portions of the county. The cities of Wasco, Delano, McFarland, and Arvin in western Kern County, all of which are heavily reliant on agricultural employment, have especially high unemployment rates, suggesting the need for reliable transit to job centers in Bakersfield as well as job training sites.

Typically transit-dependent populations such as seniors and the youth population are primarily concentrated in portions of Bakersfield, Delano, Arvin, Wasco, Shafter and Ridgecrest. These cities also have high proportions of low-income households, which are less likely to own their own vehicles and more likely to need transit services.

Perhaps the greater challenge in providing transit is serving the diversity of needs from the transit-dependent populations scattered throughout the less dense areas of Kern County.

Service Alternatives

To establish a basis for alternative service plans in Kern County, an overall service goal was identified in Report 2:

“Provide affordable, reliable and efficient transit service that effectively meets the needs Kern County residents who have limited mobility options, or those who choose transit for some or all of their local travel needs.”

Six objectives were identified to support this goal:

- Maximize service reliability and convenience.
- Maximize operating efficiency without negatively impacting service quality.

¹ Cost-sharing has been identified as an option for Kern County. This is discussed in Chapter 7 of this report.

- Operate a productive service that remains affordable for the recognized primary transit markets.
- Promote the coordination of service with other regional transportation services.
- Promote public/private partnerships to market or operate transit services in support of the goals of the Kern COG Regional Transportation Plan and the Kern County Economic and Land Use Development Goals.
- Ensure ongoing service monitoring, evaluation, and planning.

Report 2 identified the need for service standards and performance measures. It also identified preliminary service alternatives for different portions, or sectors, of the county. These alternatives include fixed route restructuring for KRT intercity routes and local fixed-route services, the implementation of flexroutes (a cross between fixed route/fixed schedule and dial-a-ride service), enhancements to dial-a-ride services, and the introduction of new mobility mechanisms, such as volunteer driver programs. To provide direction on implementation, key service strategies are revisited in Chapter 4 of this report, but preliminary service alternatives are illustrated in Figure 1-1.

Under a consolidated service plan, other objectives must be considered. While these are detailed further in this report, objectives of a consolidated service in Kern County include the following:

- Elimination of service duplication
- Maintaining service to important markets
- Improved ease of use
- Simplification of schedules
- Simplification of routes
- More efficient use of vehicles in service

Figure 1-1 Key Service Alternatives by Sector

North Kern Sector	
KRT: Bakersfield-Delano	Express service
Shafter	Expand service hours
Delano	Expand service hours, use DAR for outlying FR service
Wasco	Expand service hours, fare increase
McFarland	–
West Kern Sector	
KRT: Bakersfield-Taft	Revise schedule, increase ridership
KRT: Bakersfield-Buttonwillow	–
KRT: Taft-Derby Acres-McKittrick	Volunteer driver program
Taft	Implement flexroute, expand service hours
South Kern Sector	
KRT: Bakersfield-Lamont	–
KRT: Bakersfield-Frazier Park	Extend to Gorman, express service, subscription bus to Tejon Ranch
Frazier Park	Expand service hours, implement flexroute
Lamont	Revise schedules, use DAR for employment trippers, restrict DAR eligibility
Arvin	Expand service hours
East Kern Sector	
KRT: 58 Express	Streamline service in Tehachapi, higher capacity buses
KRT: Ridgecrest-Mojave	Volunteer driver program
KRT: California City-Palmdale	Higher capacity buses
KRT: Boron-Mojave	Volunteer driver program
Tehachapi	Implement flexroute, subscription school runs
Mojave	–
Ridgecrest	–
Randsburg/Johannesburg	Taxi service contract
Inyokern	–
Rosamond	–
California City	–
Kern River Valley Sector	
KRT: Bakersfield-Lake Isabella	Revise schedule, higher capacity buses
Kern River Valley	Implement flexroute, revise schedule

Administrative and Funding Alternatives

Given the complexity of Kern County’s rural services and the county’s vast geographic area, there may be alternative ways to organize and administer service. This is not to suggest that the current arrangement is flawed, but as the service continues to mature and grow, it is advisable to explore other arrangements that have been successful in other communities.

A review of Kern County’s transit operations found that the administrative and organizational structures for the nine local services have some similarities. Each service is administered by staff representing one or more city departments who devote time to transit service in addition to other city services. Given the localized nature of these services and their fleet size range (city fleets are between two and 16 vehicles), the staffing levels and

administrative structures appear to be appropriate. Nevertheless, under a consolidated transit system, there may be significant duplication of responsibility, and thus opportunities for administrative cost savings, which are presented in Chapter 6.

Report 2 presents four administrative alternatives for Kern County's transit services. These are as follows:

1. A status quo alternative, considered short-term because it could be implemented in the next one to three years, reflects small steps to move toward improved coordination and perhaps sharing in the cost of intercity services. The major advantage of this alternative is that the individual cities would continue to have control over all aspects of their local services and begin to address some of the regional service needs and/or high priority coordination issues.
2. A second alternative would be for two or more transit services to establish a consortium for jointly procuring vehicles, developing and implementing a region-wide marketing project or for providing a new service. The advantage of a consortium in Kern County is that staff resources are limited and that by organizing a consortium the staff responsibilities for a project can be shared so that no one agency needs to carry the entire burden.
3. A third alternative would be administrative consolidation, whereby some cost savings would be realized through economies of scale if fewer agencies were to administer transit services. Other advantages to consolidating the administrative functions include centralizing and streamlining functions such as preparing grant applications, preparing bid documents and negotiating with contractors, monitoring transit system performance and updating and distributing public information and marketing materials. Which of Kern County's various agencies or jurisdictions would be the appropriate organization for overseeing an alternate transit administrative structure? Kern County, Kern COG, or another transit operator or jurisdiction could assume responsibility for the administration of countywide transit services.
4. The fourth alternative is considered a longer-term option that could be implemented in five or more years and not until some elements of Alternatives 1, 2 or 3 were implemented and determined to be successful. This suggests that sub-regional consolidation would only be practical after the services have success with lower levels of coordination and/or consolidation. Sub-regional consolidation would entail consolidating transit services into two sub-regional areas, based on a geographic or sector approach. The advantages to this type of arrangement include improved service delivery for local and regional services through more comprehensive service planning, uniform policies and a consistent customer service orientation.

Coordination Opportunities

In addition to administrative coordination (and consolidation), there are several areas where transit coordination in Kern County may be beneficial in both the short- and long-term. This report focuses on marketing and service coordination, providing recommendations for

special projects that can be addressed by Kern County's transit providers as a primer for more comprehensive coordination and consolidation.

Conclusion

Several project objectives were accepted by the Project Advisory Committee. These preliminary objectives were assumed to be short-term coordination objectives that would need to be modified for a comprehensive consolidation effort. These include the following:

- To identify alternatives that would improve the overall quality of transit service in Kern County.
- To identify alternatives to traditional transit in addressing Kern County's regional rural mobility needs.
- To develop coordination alternatives that realize an improvement over the way transit is currently operated.
- To review, identify, and discuss alternative administrative and oversight models for transit services in Kern County
- To create a strategy for increasing the visibility and importance of transit in Kern County.
- To create partnerships between transit and non-transit organizations in addressing Kern County's transit needs.

These objectives provide a starting point for a process to coordinate and move toward consolidation. Chapter 2 introduces a consolidation strategy that is detailed in the remaining chapters of this report.

Chapter 2. Consolidation Strategy

Introduction

The decision to move toward consolidation requires a rethinking of how transit services are operated, administered and marketed in Kern County. Travel in Kern County is primarily by car, but as the population has grown and the county has seen higher levels of congestion and air pollution, other transportation solutions will become more and more important. Transit can do more than provide just a transportation alternative. A strong transit network can improve the quality of life in Kern County by connecting people with jobs and services, as well as attracting new jobs and services to the region. A solid countywide transit infrastructure can make it easier for people to transition from welfare to work. It can offer an alternative for tourists to visit Kern County's mountains, deserts, wildlife reserves and cities, and provide efficient public transit access to future high-speed rail service.

In addition to economic and quality-of-life benefits, more efficient and comprehensive transit service can minimize route duplication, allowing planning without regard to jurisdictional boundaries. Kern County can find equitable solutions for sharing the costs of transit service and potentially reduce the overall expense of administering, marketing and operating transit service.

While some cooperation has been underway among the various rural transit systems at the staff level, moving toward consolidation requires a higher level of commitment. Advanced coordination and eventual consolidation requires oversight and guidance by Kern County's decision-makers working with transit managers and planning staff.

Transit Consolidation Goals

When Kern County's policymakers initiate the process to improve coordination and consolidate transit services, it will be important to carefully define the goals and objectives.

Consolidation is much more extensive than coordination. While Chapter 1 concludes with some coordination objectives from the study process, consolidation goals must focus on specific outcomes anticipated by Kern County. Based on the extensive research in the previous two reports, interviews with stakeholders and representatives of Kern COG and basic principles of consolidating transit services, we have listed some proposed goals for Kern County. These consolidation goals can serve as a starting point for a participatory consolidation process:

- **Quality.** Improve the overall quality of transit service for consumers in Kern County.
- **Identity.** Increase public awareness of transit service and its benefits through a single rural transit provider in Kern County.

- **Participation.** Create an equitable plan for sharing the costs of providing transit service in Kern County.
- **Comprehensiveness.** Plan for rural transit without regard to jurisdictional boundaries.
- **Ease of Use.** Improve the rural transit network through service simplification, consistency and interconnectivity.
- **Dedication of Resources.** Budget and plan proactively based on countywide service standards (instead of responding piecemeal to demands as they arise).
- **Efficiency.** Evaluate cost savings by eliminating service duplication and administrative expenses.
- **Profile.** Enhance the status of transit with a larger, more comprehensive system that can compete more effectively for state and federal funds.
- **Inclusiveness.** Ensure that transit in Kern County can respond to regional needs and local priorities through equitable policymaking representation.

Why Consolidate?

Consolidation provides an opportunity to improve the efficiency and effectiveness of services that are available, allowing for a more seamless fare structure and a better transfer and connections for users. It also affords the expansion of public awareness – one transit system operating throughout the rural areas of the county, as well as into Bakersfield.

There are a number of qualitative benefits of consolidation, and potentially some benefits that are quantifiable. Benefits that most directly affect the **consumer** include the reduction and elimination of routes that duplicate one another, the development of new travel options, schedule simplification, a system that is easier to use, simplified marketing elements, and maintaining the critical transit user markets. Benefits that cannot be quantified at this point include potential ridership gains, increases in farebox recovery and productivity, customer satisfaction levels, etc.

Benefits for **transit operations**, **local jurisdictions** and **countywide services** include the reduction of overlapping services and the development of more efficient transit services, the potential for vehicle sharing, elimination of local administrative responsibility (which is transitioned to the lead agency for the consolidated system) and more efficient and consistent countywide customer service and trip planning assistance. There are also some potential benefits that cannot be quantified yet. These include possible administrative and capital cost savings.

Figure 2-1 looks at some of the benefits of consolidation for the consumer, as well as their impacts on the existing service types within Kern County. A summary of benefits for transit operations, local jurisdictions and countywide services is illustrated in Figure 2-2.

Figure 2-1 Qualitative Benefits of Consolidation for Transit Users

	Local Dial-A-Ride Services	Local Fixed Route Services	Intercity Services
Service Without Regard to Jurisdictional Boundaries	Provides timed connections allowing local dial-a-rides to serve as feeders and distributors for intercity services.	Allows some local and intercity services to share resources. For example, intercity service from Bakersfield could operate as a local collector/distributor in Delano.	Streamlines intercity services - they no longer need to do local pickups. For example, in Tehachapi, local KRT intercity deviations could be eliminated.
New Travel Options	Intercity routes can supplement local dial-a-rides, providing limited local routing through some communities. For example, on its way to Wasco, an intercity bus could pick up passengers in Shafter and drop them off elsewhere in town along the route.	Intercity routes can supplement local fixed routes, providing limited local routing through some communities.	Allows for seamless transfers and connections between intercity routes.
Schedule Simplification	Regular service spans and service days provide for reliability and familiarity across all local dial-a-rides.	Local fixed routes operate on consistent headways that pulse with intercity services. Regular frequencies, service spans and service days provide for reliability and familiarity.	Provide for consistent headways that pulse with local services. Regular frequencies, service spans and service days provide for reliability and familiarity.
Ease of Use	Allows for consistent service delivery among communities. A user of the dial-a-ride in Mojave will be able to reserve service in California City and will be familiar with policies and procedures. Provides for coordinated dial-a-ride and fixed route connections. Single fare, transfer policy, schedule information, and countywide telephone number for transit service.	Provides for coordinated local and intercity service connections. Single fare, transfer policy, schedule information, and countywide telephone number for transit service.	Provides for coordinated dial-a-ride and intercity route connections. Single fare, transfer policy, schedule information, and countywide telephone number for transit service.
Marketing Simplification	Makes system easy-to-recognize. Provides for uniform logos, bus design and fare instruments. Marketing information is comprehensive and consistent. Comprehensive customer service is available to rural transit users.	Makes system easy-to-recognize. Provides for uniform logos, bus design and fare instruments. Marketing information is comprehensive and consistent. Comprehensive customer service is available to rural transit users.	Makes system easy-to-recognize. Provides for uniform logos, bus design and fare instruments. Marketing information is comprehensive and consistent. Comprehensive customer service is available to rural transit users.
Maintaining Important Service Markets	ADA-complementary dial-a-ride services are maintained in communities with local fixed route service. General public dial-a-rides are still available in lower density and small communities.	Allows all key origins and destinations to be served more efficiently. A consolidated service makes transit more attractive to current non-riders.	Allows all key origins and destinations to be served more efficiently. A consolidated service makes transit more attractive to current non-riders.

Figure 2-2 Qualitative Benefits of Consolidation for Transit Operators and Local Jurisdictions

	Transit Operations	Local Jurisdictions	Countywide Improvement
More Efficient Transit Services	Reducing overlapping transit services means that some resources can be reallocated to other more efficient uses. For example, this may allow for greater frequencies or longer hours within a service area.	Political leaders will see more “local service” with intercity routes making more local stops as they pass through town, supplementing local fixed routes or dial-a-ride service.	Under one service network, local and intercity operations are seamless. Transit travel throughout Kern County is perceived as easier.
Vehicle Sharing Among Services and Routes	Vehicle assignment is more flexible. Procurement can be streamlined. Vehicles can be interlined so they can have better access to CNG fueling facilities throughout the county. Large and small vehicles can be exchanged based on peak and off-peak needs.	Appropriately sized vehicles can be assigned to individual services. Vehicle costs may be reduced due to joint procurement.	Vehicles all have a consistent look and are easily recognizable. Having so many buses operating under one consolidated system reflects Kern County’s commitment to transit and transportation alternatives. Vehicles can be interlined so they can have better access to CNG fueling facilities throughout county.
Elimination of Local Administrative Responsibility	Current local staff transit administrative responsibilities are eliminated so they can focus on other local priorities. This results in potential cost savings (transit hiring, supervision, data collection, facilities, maintenance, etc.), as well as centralized reporting.	City staff can focus on non-transit issues. All data collection and reporting is centralized. There is potential cost savings to the local jurisdictions (depending on whether transit administration costs can be quantified).	All transit management, hiring, supervision, maintenance, capital investments, data collection and reporting is centralized.
Efficient and Accurate Countywide Customer Service	Centralized dispatch, scheduling and communications enhance ability to coordinate intercity trips. Reduces inconsistencies in public information and enhances distribution of up-to-date information.	Less dependence on local intervention in transit service accommodations. Offers a single countywide resource for local communities and social service agencies. Potential reduction in telephone and printing costs at local level.	Provides for coordinated dial-a-ride and intercity route connections. Consistency regarding single fare, transfer policy, schedule information, and countywide telephone number for transit service.

Concerns about Consolidation

For the consumer, there are few disadvantages of consolidation. Seamlessness, transferability, coordinated fares and services – all of these are benefits. Nevertheless, centralizing planning, operating and customer service functions lead to concerns about accountability and local participation.

The primary concerns about consolidation that local transit operators expressed in the stakeholder interviews and through the Project Advisory Committee involve three key elements:

- The potential loss of local involvement in planning and administering the service.
- Transit no longer reflecting a community's unique identity and character.
- A loss of local control in policymaking and oversight.

Indeed, consolidation takes many of the day-to-day transit functions out of the hands of local communities. Because so many local transit operators have established relationships with their clients and can offer a unique familiarity and flexibility, there is concern that this element of service will be diminished.

Many of the County's transit operators, particularly those in the smallest communities, expressed a willingness to move toward consolidation as long as quality, personalized service would still be provided within the community. Some administrators noted that taking transit off their list of responsibilities would allow them to focus on other priorities.

Would a dispatcher located in Bakersfield really be able to understand an individual's needs in California City or Shafter? Under a consolidated system, could transit service be extended into the evening to accommodate a special festival in McFarland or Ridgecrest? Is it possible for Tehachapi or Arvin to increase their share of funding for transit in order to get more frequent service or extended service hours locally? These are important issues that need to be identified and deliberated in the process of moving toward consolidation. The consolidation process is essentially about coordinating and negotiating details around goals and objectives that are supported by specific policies and service standards. Agreeing on these goals and objectives, and then working to identify countywide service standards and policies should be among the first steps in the consolidation discussion process. The ultimate plan for consolidation would address each of these concerns and others that are identified by local jurisdictions as well as transit users. Chapter 8 discusses the implementation process.

Topics for Consolidation

Apprehension about significant change is reasonable. However, with so many potential benefits to be derived from a single rural transit operator in Kern County, the eventual consolidation of services merits the interest of the stakeholders. A process that allows social service agencies, rural/small city transit operators and political leaders to work together to identify policy priorities and small coordination steps will make the prospects of consolidation more successful.

Several areas of focus will comprise the consolidation process in Kern County. They include each of the following and are discussed in the following chapters:

- **Administrative Responsibility.** Determine who should be responsible for day-to-day administration of transit services, including planning, operations, data collection and reporting.
- **Funding and Cost Sharing.** Discuss how costs for current services – as well as service under a consolidated system – can be shared by the participating jurisdictions.
- **Governance.** Review options for the policy and decision-making structure for the consolidated rural transit system.
- **Service Planning.** Review short-term improvements to the existing rural transit network. Examine transportation alternatives. Establish priorities and procedures for planning for a consolidated rural transit network in Kern County.
- **Marketing.** Identify short-term coordination efforts. Provide a marketing strategy guide for a consolidated system.

Chapter 8 reviews the key components for each area of focus and summarizes strategies to begin the process of consolidating Kern County's rural transit services.

Chapter 3. Governance

Introduction

Since public transit services rely on government subsidies they need to be accountable to the public. That is, a board of elected or appointed representatives has an oversight role in the delivery of public transit services. A policy board oversees service, sets policy and serves as the final decision-making body. These responsibilities are separate and distinct from the day-to-day business of running a transit system.¹

Governance is the first of the five primary areas of focus for consolidated system design in Kern County. Governance is about establishing goals and objectives and making policy-level decisions to guide where, why, when and how service is funded and provided. The discussion about governance in this chapter focuses on the policy or oversight board.

The major decisions that rest with a policy or oversight board are as follows:

- Establishing route design and service policies
- Approving operating and capital budgets
- Setting fares and fare policy
- Conducting public hearings on service and fare changes and capital investments
- Developing legislative and advocacy positions
- Reviewing and developing policy recommendations at the local and regional level

Currently each of the 12 separate transit services in Kern County has its own policy board. Each city council serves as the policy board for the city-run service and the Board of Supervisors serves as the policy board for KRT. Golden Empire Transit (GET) District has its own five-member policy board. If transit services in the County pursued administrative consolidation, there would be no need to change the current policy board structure. The city councils and Board of Supervisors would continue to serve as the policy-setting body as they do today. If, however, the individual transit services consolidated under one system, a new policy board would be required. This would raise questions such as:

- What is an equitable composition for a policy board?
- What is the proper balance between local and regional interests?
- How many members should sit on a policy board?
- Should members be appointed or elected?

¹ Day-to-day tasks are handled by municipal or agency staff. They are responsible for planning, budgeting and other administrative tasks with private contractors typically operating day-to-day service. Administrative responsibility is discussed in Chapter 6.

These policy board questions are often the most sensitive issues related to transit service consolidation. There is no universal approach to this issue and it can be addressed in a number of different ways. Figure 3-1 shows the policy board structure of five other local and inter-city transit agencies as examples of how other consolidated services approached this issue. It reveals that the agencies range in size from five members on the South Coast Area Transit Board of Directors to 11 members on the Board for Merced County Transit.

Figure 3-1 Administrative Staff and Policy Board Structure – Other Counties

Agency	Public or Contracted Operation	Administrative Staff	Policy Board Structure
Livermore Amador Valley Transit Authority (Alameda County)	Contracted Operation	(9 Admin staff) General Manger, Asst. GM, 2 Management positions, 4 Professionals and 1 Support Position	7 elected officials; two reps each from Livermore, Dublin and Pleasanton and one rep from County
Tri-Delta (Contra Costa County)	Public Operation	(10 Admin staff) General Manager, Asst. GM, Director of Procurement & Employee Resources, 3 Professionals and 3 Support Positions	JPA, 9 members; two reps from Antioch, Pittsburg and Kentwood, two reps from Contra Costa County and one at-large member appointed by the entire board
WestCAT (Contra Costa County)	Contracted Operation	(5 Admin staff) General Manager, Assistant GM, Planner, ADA & Survey Position, Admin. Assistant	7 member board; 2 reps each from Dublin and Hercules, one rep each from 3 unincorp cities (appointed by County Board of Supervisors)
Yolobus (Yolo County)	Public Operation	(7 Admin staff) Exec Director, 3 Professionals and 3 Support Positions	7 member board; 1 from board of supervisors, 1 rep from Davis, W. Sacramento, Woodland and Winters; 1 from UC Davis; 1 from Caltrans
The Bus (Merced County)	Contracted Operation	(3 Admin staff) Manager, Asst. Manager and Clerk Typist <i>Plus</i> purchased admin services from County	JPA, 11 member board. One rep from each of the six incorporated cities and the 5 members from the County Board of Supervisors
South Coast Area Transit (Ventura County)	Public Operation	(10 Admin staff) General Manager, 4 Management Positions, 5 Support Positions	JPA, 5 member board. One rep each from Ojai, Oxnard, Port Hueneme and San Buenaventura, One rep from Ventura County Board of Supervisors
Yuba Sutter Transit (Sutter County)	Public Operation	(3 Admin Staff) Transit Manager, Administrative Analyst and Adm. Assistant - (75% of time is dedicated to transit)	8 member board; 2 each from Marysville, Yuba City, Yuba County and Sutter County

Policy Board Representation

The following section presents three methodologies for determining an “equitable” composition for a policy board under a consolidated system. The policy board composition is tied to the designated lead agency for administering a consolidated transit system. For a discussion on the lead agency responsibilities and options for Kern County, refer to Chapter 6.

Policy board options are:

- Board of Supervisors
- Kern COG
- New Policy Board
 - Representation based on population
 - Representation based on transit expenditures

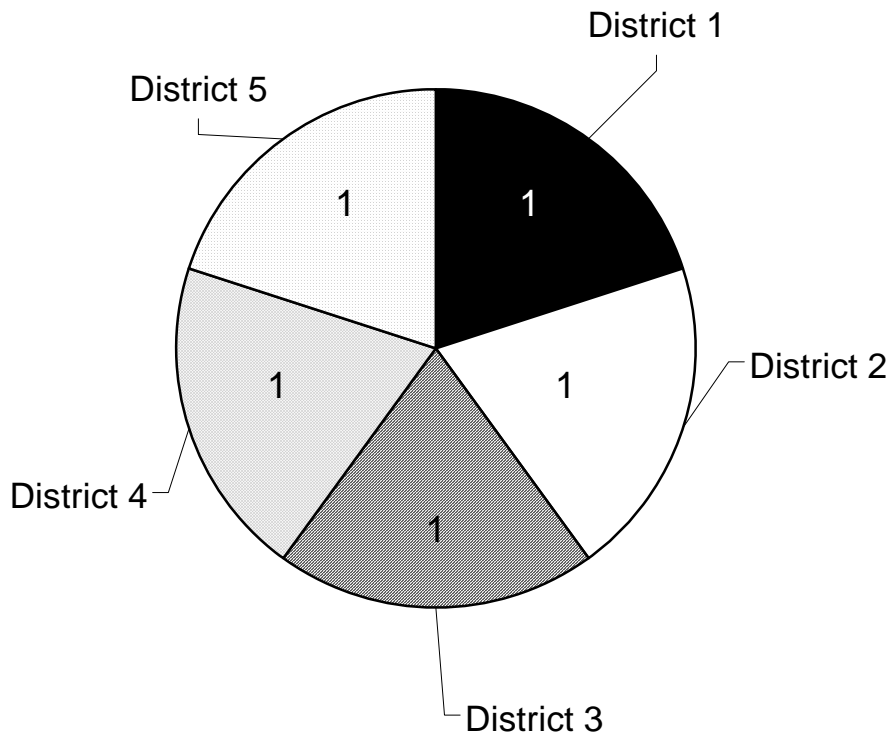
A brief description of each option is provided below, including figures to illustrate the level of representation for each jurisdiction in Kern County. A figure summarizing all of the policy board options (Figure 3-8) can be found at the end of this section.

1. Current Kern County Board of Supervisors

If Kern County were to act as the lead agency, then the Kern County Board of Supervisors would be the logical policy board. The Board consists of five Supervisorial Districts with one representative from each District. The Supervisorial District boundaries approved in August 2001 are based on the 2000 Census with each district containing about the same number of people. Currently the Board of Supervisors serves as the policy board for KRT.

A major advantage of relying on the Board of Supervisors is that it would require no change from the policy/oversight of the current county transit system. The Board would continue its role as a policy setting body for transit. One disadvantage is that the cities may feel their local needs may not be well represented and that they may lose some control over their local community services. The sense of “loss of control” is a very common and genuine concern when dealing with transit service consolidation, and often arises when examining policy board composition.

Figure 3-2 Current Kern County Board of Supervisors



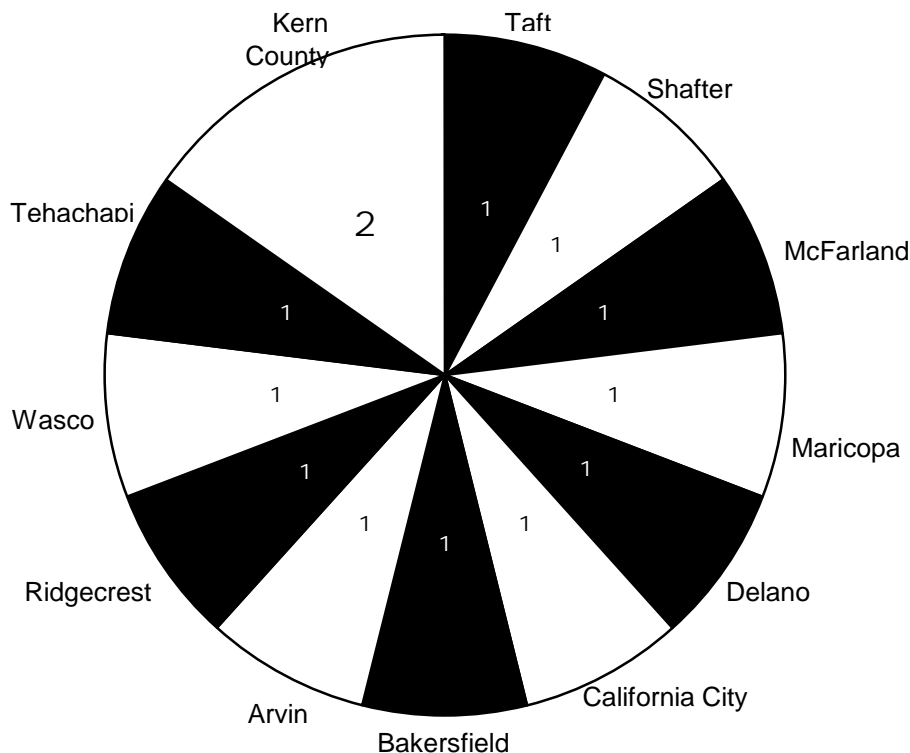
2. Current Kern COG Board

The Kern COG Board has 16 members. Each city in Kern County has one elected representative. In addition, there are representatives from the County of Kern Board of Supervisors. Three ex-officio members who represent Caltrans, GET and the JPPB also serve on the Board.

In Merced County – a reasonable model for Kern County – the Merced County Association of Governments (MCAG) was selected to serve as the policy oversight board when three separate city transit services consolidated as one new system. This 11-member board consists of one representative from each of the six incorporated cities and the five-member County Board of Supervisors.

A major advantage of following this model and relying on the Kern COG Board would be ease of implementation. It is a standing board with a high level of local representation. The major disadvantage is that the COG may not have the capacity or the interest in assuming either the lead agency role or serving as the policy oversight board.

Figure 3-3 Current Kern COG Voting Representation²



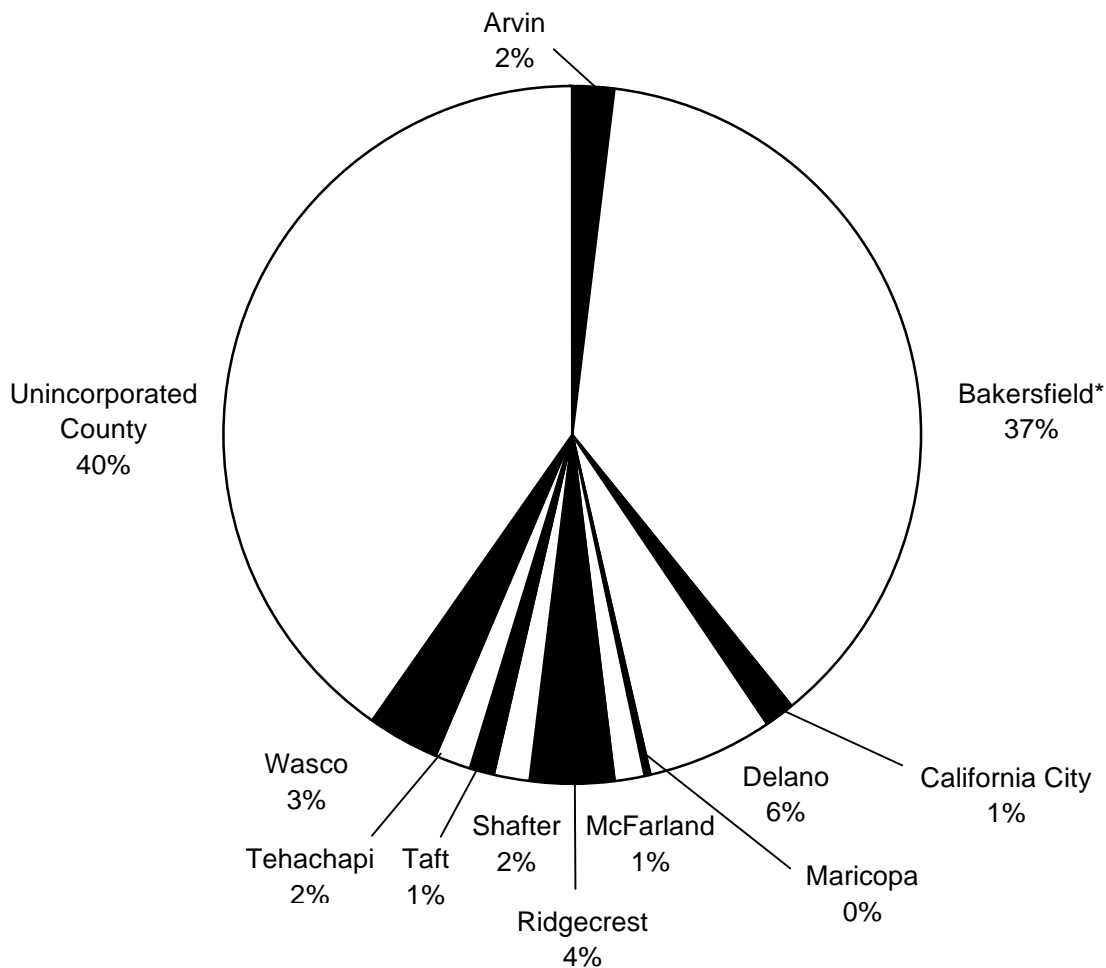
² Figure shows 13 voting Board members. In addition, the Kern COG Board includes three ex-officio members representing Caltrans, GET and the JPPB.

3. New Board Based on Population

This option would create a new policy board based on population using the 2000 Census Countywide figure of 661,645. Based on each jurisdiction’s percentage share, any number of representatives could serve on a proposed new policy board. Figures 3-4 and 3-5 show the percentage split for the county and each of the cities, as well as the proposed representation for a 13-member board.

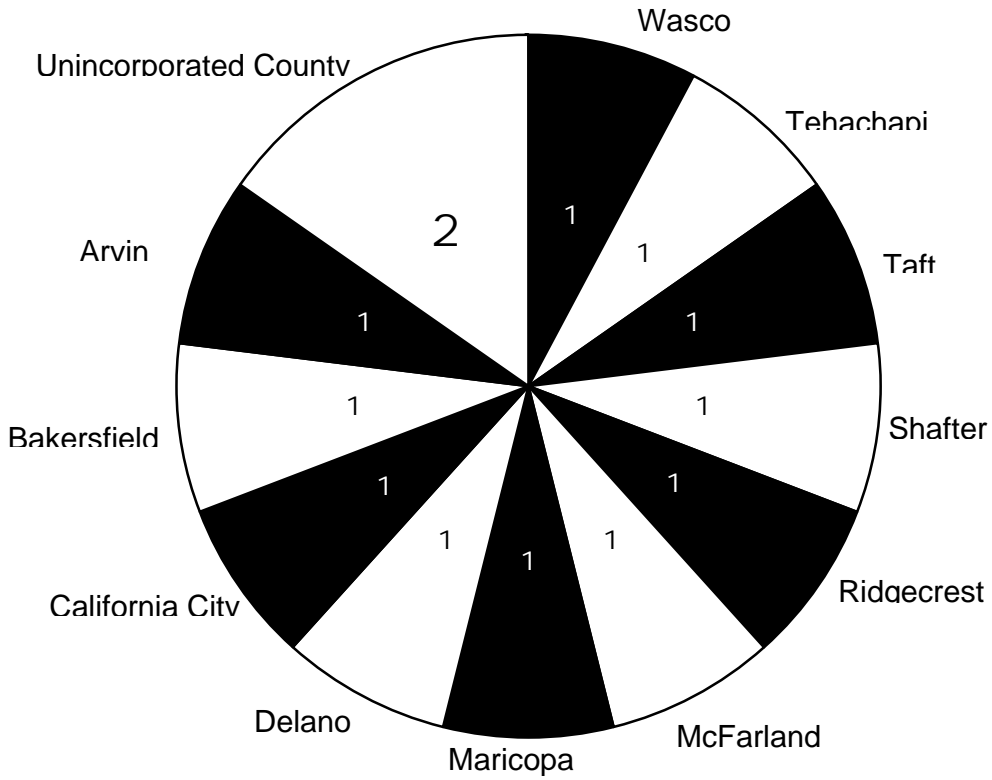
This policy board option may be more appealing than the Board of Supervisors option because each city would have a member on the board. The County would have two representatives to account for the nearly 40% of the county population living in unincorporated areas, including the communities of the Kern River Valley, Mojave, Rosamond, Frazier Park and Lamont, which are served by KRT. Even though GET would continue to function as a stand-alone transit district, Bakersfield would be included in this proposed policy board because it represents about one-third of the County’s population. A representative of the City of Bakersfield, not GET, would sit on the board.

Figure 3-4 Kern County Population Share



* Bakersfield is included, even though GET would not be part of the proposed consolidated rural transit system.

**Figure 3-5 Policy Board Representation:
Population Based = 13 Members**



** Bakersfield is included, even though GET would not be part of the proposed consolidated rural transit system.*

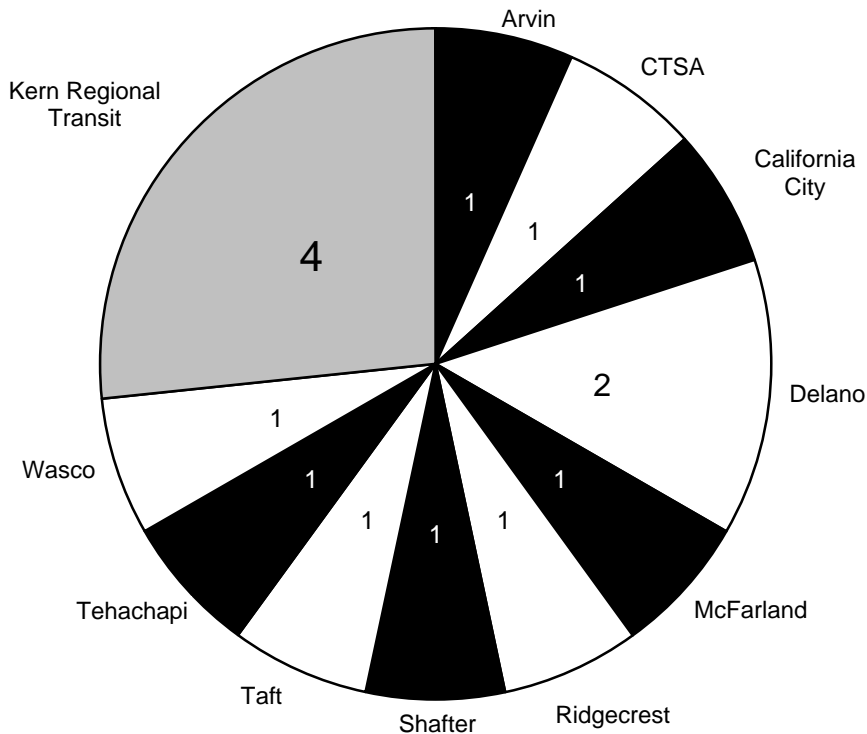
4. New Board Based on Transit Expenditures

A new policy board could be created to reflect expenditures on transit services. The rationale for this approach is that the more a jurisdiction spends on transit, the greater its voice should be in setting transit policy. This approach could be based on LTF expenditures on transit to reflect a jurisdiction's commitment to transit. Alternatively, a board composition could also be based on total expenditures on transit including other outside revenue sources such as General Funds, Federal Transit Administration (FTA) Section 5311 or regional air district funds. Figure 3-6 lists each city and the dollars devoted to transit services in FY 2002 for a countywide total of \$7.5 million. The dollar commitment varies widely by size of city and level of local services, from \$58,000 in McFarland for its local dial-a-ride service to nearly \$4.0 million for Kern Regional Transit. Delano spent 13% of the total countywide transit expenditures and over 50% was spent on KRT. The remaining cities each spent less than eight percent of the total. Based on these figures, a proposed 15-member policy board would include one representative from each city with Delano assigned two representatives and the County would have four representatives as depicted in Figure 3-7.

Figure 3-6 Transit Service Expenditures – Countywide

Agency	Transit Expenditures (FY 2002)	% of Countywide Total Devoted to Transit Services
Arvin	\$313,307	4%
CTSA	\$562,765	7%
California City	\$232,181	3%
Delano	\$952,167	13%
McFarland	\$58,432	1%
Ridgecrest	\$540,477	7%
Shafter	\$153,750	2%
Taft	\$502,188	7%
Tehachapi	\$90,085	1%
Wasco	\$160,955	2%
Kern Regional Transit	\$3,944,268	53%
Total Spent on Transit	\$7,510,575	100%

Figure 3-7 Policy Board Representation – Dollars Devoted to Transit



Summary of Policy Board Options

Figure 3-8 below presents a summary of the four proposed policy board options. The number of board members for each alternative ranges between five and thirteen. The current Board of Supervisors has only five members compared to the Kern COG Board, which has 16 members. A population-based policy board is similar to the Kern COG Board without the representatives from Caltrans, GET or the JPPB.

Even though four possible policy board options are presented, this does not suggest that these are the *only* alternatives. A transit technical advisory committee could suggest other options for consideration. There is also the possibility that board members could have a weighted vote based on the service hours and miles operated within each jurisdiction’s boundaries. The ultimate objective is to develop a policy board structure that provides an equitable level of representation for the cities and the County.

Figure 3-8 Proposed Representation by Policy Board Options

	1. Current County Board of Supervisors	2. Kern COG	3. Population Based	4. Based on Transit Expenditures(1)
Arvin		1	1	1
Bakersfield		1	1	
California City		1	1	1
Delano		1	1	2
Maricopa		1	1	1
McFarland		1	1	1
Ridgecrest		1	1	1
Shafter		1	1	1
Taft		1	1	1
Tehachapi		1	1	1
Wasco		1	1	1
Kern County	5	2	2	4
<i>County District 1</i>	<i>1</i>			
<i>County District 2</i>	<i>1</i>			
<i>County District 3</i>	<i>1</i>			
<i>County District 4</i>	<i>1</i>			
<i>County District 5</i>	<i>1</i>			
Caltrans District 6		1		
GET		1		
JPPB		1		
Total	5	16	13	15

(1) Bakersfield not included in this option.

Next Steps

Determining the appropriate policy board composition is closely tied to a decision about a designated lead agency. These two important administrative decisions are intrinsically linked and will need to be addressed in a coordinated fashion.

The next steps in the process of consolidating transit services would be to narrow down the lead agency options to one or two and to then identify a corresponding policy board structure. The ultimate decision on a policy board structure should meet the objectives of ensuring equitable representation for the cities and county and should be agreed to by a transit technical advisory committee or a Consolidation Planning Steering Committee (as described in Chapter 8). The final list of lead agency and policy board options should be presented to current policy board members throughout the County for preliminary review and feedback before further refinement.

Chapter 4. Service Strategy

Transit service needs and operating conditions vary significantly throughout Kern County. The service strategy builds on, and enhances the diverse mix of transit/public transportation strategies that have evolved throughout Kern County. The proposed strategy reflects a countywide approach emphasizing the most cost-effective service alternative for each situation including the reassignment of resources to areas of greatest need.

Short-Term Transportation Strategies

Short-term strategies are operational in nature and address fixed route running time, schedule and capacity issues, as well as service flexibility and cost efficiencies. Included are proposed adjustments to KRT intercity route and schedule changes, volunteer driver reimbursement initiatives, subscription bus service, car/van pool programs, and flexroute services.

KRT Intercity Transit Enhancements

Reductions in travel time make transit a more attractive alternative to the automobile for longer distance commute trips, especially in areas with traffic congestion and limited parking. Reductions in travel time can be achieved through direct local routes, the reduction of bus stops along routes, and where possible, the reduction of transfers. Adjusting bus route schedules to match shift start and finish times also make transit more attractive by reducing passenger wait times.

In the short term, five enhanced express services are recommended in Kern County:

- North Kern Express
- Westside Express
- Frazier Park Express
- 58 Express
- Lake Isabella/Bakersfield Route

Operational Requirements, Potential Costs and Implementation

Figure 4-1 provides a summary description of the proposed KRT intercity transit enhancements. It identifies additional resources, the costs to operate these services and the next steps toward implementation.

Figure 4-1 Proposed Kern Regional Transit Intercity Service Enhancements

Description	Additional Costs and Resources	Implementation Steps
North Kern Express		
<p>Operate as a local service in Delano at the beginning and end of each round trip.</p> <p>Limited stops in McFarland.</p> <p>Operate with closed doors (no stops) between McFarland and Bakersfield.</p> <p>No stops in Wasco and Shafter.</p> <p>Operate as a local to the existing North Kern Express stops in Bakersfield.</p> <p>One AM and one PM trip/weekday.</p>	<p>If enhanced service replaces an existing AM and PM North Kern Express trip, then No additional revenue hours and No additional bus is requirement.</p> <p>If offered in addition to the existing North Kern Express service, the added service would require 765 annual revenue hours and cost approximately \$35K/year (gross operating costs).⁽¹⁾</p> <p>One additional bus may be required if this is a service expansion.</p>	<p>Monitor passenger boardings and alightings at the Wasco and Shafter bus stops to measure the number of passengers that may be impacted if the proposed express service replaces one existing AM and PM trip.</p> <p>Evaluate impacts on existing ridership and local service levels in Delano.</p> <p>Revise local route structure in Delano.</p> <p>Adjust North Kern Express and Delano Area Rapid Transit schedules, reprint route brochures and market service.</p>
Westside Express		
<p>Delay trips 3, 4, and 5 to address PM capacity issues and to provide more evening class capacity for Taft College.</p>	<p>No additional revenue hours or costs.</p>	<p>Survey passengers to determine impact.</p> <p>Evaluate impacts to existing service schedules and vehicle availability.</p> <p>Adjust schedules around Taft class times, reprint route brochure and market service.</p>
Frazier Park Express		
<p>Operate as an express bus between Frazier Park and the Bakersfield bus stops to reduce travel time.</p> <p>Eliminate Laval Road stops.</p>	<p>No additional revenue hours or costs.</p>	<p>Monitor passenger boardings and alightings at the Laval Road bus stops to measure the number of passengers that may be impacted by the change.</p> <p>Evaluate impacts to existing service schedules and vehicle availability.</p> <p>Adjust schedules, reprint route brochure and market service.</p>
58 Express		
<p>Reduce local routing through Tehachapi and cut service to Old Town.</p> <p>Limit the Tehachapi routing to Tehachapi Blvd., with a central stop near the train station and one at K Mart.</p>	<p>No additional revenue hours.</p>	<p>Implement Tehachapi Flexroute service as a feeder.</p> <p>Adjust schedules, reprint route brochure and market service.</p>
Lake Isabella/Bakersfield Route		
<p>Add an additional PM return trip departing outbound around 4:30 PM to ease overloads – larger buses can not operate effectively on the canyon portion of Highway 178.</p>	<p>Would not require additional hours if the poorly performing 2nd or 3rd trip were eliminated.</p> <p>If an additional trip is added on weekdays, the expanded service would require 383 annual revenue hours and cost approximately \$17,700/year⁽¹⁾ (gross operating costs).</p> <p>Would not require additional hours if the poorly performing 2nd or 3rd trip were eliminated.</p> <p>An additional bus may be required if this extra trip cannot be interlined with another bus route.</p>	<p>Monitor passenger counts on the 2nd and third trip to determine if any existing hours could be reallocated to the new PM outbound trip.</p> <p>Adjust schedules, reprint route brochure and market service.</p>

(1) Assumes a cost of \$46.13/revenue hour for KRT intercity service.

Volunteer Driver Reimbursement Program

Volunteer driver programs are used to provide trips for persons who do not have access to an automobile. Volunteer driver trips are appropriate for medical appointments, training, job placement, and social service appointments, as well as shopping for food, clothing and personal effects. They are essentially a transportation subsidy for transit-dependent individuals or families who live in low density or remote areas that cannot be effectively served by public transit services.

Kern County Applications

A volunteer driver program could be implemented throughout rural Kern County. As an initial step, a pilot program is recommended to replace the KRT funded services in

- Taft-Fellows-Derby Acres-McKittrick
- Boron, and
- Ridgecrest-Randsburg/Johannesburg services.

Program Structure

The administration and coordination of individual volunteer driver reimbursements could be centralized in Kern County. The program should be restricted to individuals who can demonstrate that they do not have access to an automobile. In addition, eligible persons should be required to register with the agency managing the volunteer driver program.

General characteristics of the recommended driver reimbursement program for Kern County are summarized in Figure 4-2.

Figure 4-2 Proposed Kern County Volunteer Driver Program Characteristics

<p>Administration</p> <p>Centralized administration and coordination is desirable to achieve economies of scale and lower overhead costs. The program should be administered through a community-based organization other than KRT. There must be a physical separation from KRT in order for the driver reimbursement to be eligible for TDA funding. This also means that the volunteer driver reimbursement costs would not have to be included in the systemwide TDA farebox ratio calculation.</p> <p>The administrative body could be a local, countywide nonprofit or a local service contractor. Under a recommended arrangement, the County would be responsible for registration and the program administrator would approve trip requests and process the trip claims.</p>
<p>Eligibility</p> <p>The pilot program would be available to residents of Fellows, Derby Acres, McKittrick, Boron, North Edwards, Randsburg and Johannesburg. Eligibility could be expanded once a pilot program has proven successful.</p> <p>Eligibility would be based on demonstrated need. The program would be available to households without access to a roadworthy or registered automobile and for a variety of trip purposes that affect well-being. Pre-registration would be required and registration would include an explanation of why the individual or household required a transportation subsidy.</p> <p>Trip purposes could include medical appointments and care, training, job placement, social service appointments and basic shopping for food, clothing and personal effects. Eligible trips would be limited to the destinations currently served by the services the volunteer driver reimbursement program is intended to replace.</p> <p>All eligible program participants will sign a waiver acknowledging that they accept full responsibility for the verification of vehicle roadworthiness and insurance coverage when they recruit their own volunteer driver.</p> <p>Program participants must be responsible to provide an approved child car seat if required.</p>
<p>Day-to-Day Operation</p> <p>Prior approval has to be obtained for each trip request. Program administration staff will make a judgment call based on the requestor's registration information, the trip purpose, destination and the administration staff member's understanding of the individual's situation. The program should begin with the responsibility for recruiting a volunteer driver resting with the individual requesting a subsidized trip. Through time, the program could recruit a registry of volunteer drivers willing to drive others for a mileage reimbursement.</p> <p>Reimbursement would be based on a \$.36/mile rate (assuming current reimbursement rate for Kern County staff). Through time, this rate may increase as the mileage reimbursement rates for Kern County staff increase. All mileage claims will be verified by the program administration staff. The program will adopt the existing Kern County maximum distances established for travel between communities.</p>
<p>Driver Requirements</p> <p>All volunteer drivers will be required to be fully licensed, and provide a roadworthy, registered and fully insured automobile for use in the program.</p> <p>If drivers are recruited by the program administrator or County then the following requirements must be verified:</p> <ul style="list-style-type: none"> • The driver has a valid California license, insurance and registration. • The vehicle to be provided is equipped with functional heating and ventilation systems, clean, accessible seat belts, functional doors, an accurate speedometer, windows that are crack free, functioning interior lighting, two side mirrors, safe tires and fully functional head lights, turn signals and windshield wipers.
<p>Reporting and Monitoring</p> <p>The program administrator will be required to provide monthly reports summarizing the number of trips subsidized, the total mileage reimbursed and total costs (including administrative overheads) and maintain records of all reimbursement claims for possible auditing purposes. Assuming program implementation in the short-term (pre-consolidation), monthly reports should be forwarded to KRT staff and summarized in all KRT performance reports.</p>
<p>Other</p> <p>The County will be required to maintain insurance coverage that covers exposures addressed in Comprehensive General Liability, Business Auto Liability (as a secondary policy to the volunteer driver's primary coverage), and Umbrella/Excess Liability. Any extra County insurance costs related to this program should be paid with funds budgeted specifically for the County-Wide Volunteer Driver reimbursement program. A participant fare policy should be established to provide a revenue source and reduce the subsidy cost per trip. Tehama County is currently developing a participant contribution policy based on income. An alternative fare structure could be based on the current fare structures in effect for the service to be replaced. A participant fare policy should be finalized by Kern COG, KRT staff and a task force made of social service program administrators.</p>

As listed in Figure 4-2, volunteer drivers must have a fully insured automobile. In addition, the sponsoring organization should maintain insurance coverage. While the volunteer's insurance would be primary in case of an incident, this secondary insurance would cover additional costs if needed. Volunteer driver program sponsoring organizations should carry comprehensive general liability insurance, business auto liability insurance, volunteer dishonesty insurance, and directors and officers liability insurance. Some insurance companies offer *volunteers' liability insurance*, and many nonprofit organizations carry umbrella excess liability coverage.

The sponsoring organization can require drivers to participate in the California DMV Pull Notice program. This will enable the sponsoring organization to learn immediately when a driver's license is suspended, is involved in an accident, is convicted, etc.

Funding

If administered and coordinated by an outside organization, the driver reimbursement program is eligible for TDA funds. Figure 4-3 summarizes proposed annual service levels, projected reimbursement costs, administration costs, and fare recovery for the volunteer driver reimbursement program by service area.

Figure 4-3 Volunteer Driver Reimbursement Program Summary

	Fellow-Derby Acres- McKittrick	Boron	Randsburg- Johannesburg	Total of All Recommended Volunteer Driver Service Corridors
Total Costs	\$1,656	\$2,174	\$1,366	\$5,196
<i>Reimbursement Costs</i> ⁽¹⁾	<i>\$1,440</i>	<i>\$1,890</i>	<i>\$1,188</i>	<i>\$4,518</i>
<i>Administration Costs</i> ⁽²⁾	<i>\$216</i>	<i>\$284</i>	<i>\$178</i>	<i>\$678</i>
Revenues ⁽³⁾	\$600	\$600	\$800	\$2,000
Revenue Recovery Rate	36.23%	27.61%	58.56%	38.49%
Net Operating Costs <i>(cost minus revenue)</i>	\$1,056	\$1,574	\$566	\$3,196
Projected Annual One Way Passenger Trips ⁽⁴⁾	400	200	200	800
Cost/Passenger Trip	\$2.64	\$7.87	\$2.83	\$3.99

⁽¹⁾ Based on a \$.36/mile reimbursement and a 20-mile average one-way trip for the Fellow-Derby Acres-McKittrick service, 35-mile one-way trip for the Boron service and 22-mile one-way trip for the Randsburg-Johannesburg service.

⁽²⁾ Assumes 15% of the reimbursement costs.

⁽³⁾ Based on the current fare structure for the services currently provided.

⁽⁴⁾ Demand estimates are conservative. Although low, they assume an increase in ridership over current service because the Volunteer Driver program would allow for greater travel flexibility.

Given the low volume of projected trips for a proposed volunteer driver reimbursement program, it would be desirable to contract with an existing broad-based agency. A volunteer-based organization would be a good choice for program administration.

Given the low cost per trip, it is recommended that the County consider a small fare or passenger contribution.

Implementation Steps

Should Kern County decide to develop the Volunteer Driver Reimbursement Program, key implementation steps include the following:

- Develop administrative protocols and service policies.
- Develop administration contract specifications and RFP.
- Call for and evaluate program administration proposals.
- Design public information materials.
- Inform public and social service agencies of new driver reimbursement program.
- Implement and administer registration process.
- Provide staff orientation.
- Select program administrator and implement program.
- Discontinue the Taft-Fellows-Derby Acres-McKittrick Dial-a-Ride and Boron and Ridgecrest-Randsburg/Johannesburg bus services.
- Monitoring and evaluate service.

Subscription Bus Service

Subscription bus services are designed to serve large employment sites or educational institutions. Schedules are designed around work shifts or class schedules. Inbound and outbound routing is customized to provide service close to the residences of service subscribers, and can change as the subscribers change.

Exploration of a subscription bus service between the communities of Lamont and Arvin and the Tejon Ranch Business Park and Laval/I-5 service facilities is recommended. The services could be designed around the specific shift start and finish times of the key employers in both job concentrations and provide a premium, direct service to a targeted market of transit-dependent employees in the nearby communities of Lamont and Arvin.

Operational Requirements

Both the Lamont and Arvin subscription services could use their respective dial-a-ride vehicles in a tripper capacity. Each service could be scheduled by “borrowing” a dial-a-ride vehicle from regular service to complete one (or more) AM inbound and PM outbound trip

to drop off and pick up workers at their jobs in the Tejon Ranch Business Park and Laval/I-5 service areas.

To be productive, the services should be scheduled around specific shift times and limited to a maximum 60-minute one-way onboard travel time between the furthest points. Minimum hourly productivity standards should be between nine and 15 – the targets for intercity and community fixed route services, depending on the seating capacity of the vehicles used in the subscription service.

Most subscription bus services in other communities recoup a high proportion of their costs – at least 30 percent – with many services achieving 50 to 100 percent cost recovery. Thus, it is recommended that fare policy be established to achieve a minimum 30 percent cost recovery for this service. If the KRT subscription service is successful, a modest subscription fare increase could further improve cost recovery on this service.

Similar to paratransit subscription services, passengers would book in advance for the service. A schedule would be established for the service based on the targeted shift start/finish times and the location of the subscribers’ residences and jobs. To ensure farebox recovery, weekly or monthly passes are recommended. A weekly pass is desirable if the market cannot readily afford a monthly pass.

Funding and Costs

The recommended subscription services could be initially funded through FTA, TDA and farebox revenue sources. CalWORKS sources could be explored for welfare-to-work placements. As the economy improves and employers have difficulty attracting employees, major employers in both Tejon Ranch Business Park and Laval/I-5 service areas could be approached as funding partners to minimize public subsidy.

If the subscription trips are scheduled within the existing dial-a-ride service span, no additional revenue hours would be required. (Logically, if the service falls outside the current service hours, additional hours will have to be operated and funded.)

Figure 4-4 provides a summary of potential annual costs for a two-route subscription service between the communities of Lamont and Arvin and the job concentrations in the Tejon Ranch Business Park and Laval/I-5 service areas.

Figure 4-4 Subscription Service Costs

	Annual Revenue Hours	Annual Costs
Lamont Subscription Bus	765	\$11,100 ⁽¹⁾
Arvin Subscription Bus	638	\$29,320 ⁽²⁾

⁽¹⁾ Assumes \$14.53/revenue hour for the Lamont service, based on operating cost information provided by the transit operator.

⁽²⁾ Assumes \$45.95/revenue hour for the Arvin service, based on operating cost information provided by the transit operator.

Vanpool and Carpool Coordination with Employers

Transportation strategies for Kern County must address the diverse needs of the County's agriculturally based processing plants such as BunnyLuv and new employer concentrations in emergent developments such as the Tejon Ranch Business Park. Plant locations, shift times and employee residential distributions are not always conducive to cost-effective and marketable transit services.

Major employers, such as BunnyLuv, generate significant traffic yet are not located – or their shifts are not structured – in ways that make public transportation a viable option. Why? Because shift workers commute to facilities during peak and off-peak periods.

Operational Framework

Carpooling and vanpooling work best when implemented by moderate and large employers with centralized facilities. Closely located groups of smaller employers can also organize carpools. Often carpooling and vanpooling are supported by programs such as preferential carpool/vanpool parking, guaranteed ride home programs and employee subsidies.

Typically, employers provide equipment and insurance for vanpool programs, whereas carpools are less formal. Programs such as rewards or other prizes can also be important motivators. For example, San Luis Obispo Rideshare offers gift certificates for people who use vanpools a certain number of times.

Funding and Costs

The costs of employer-based carpool and vanpool programs are low. No direct public subsidy or equipment is required.

Implementation Steps

To organize a carpool/vanpool program, an employer can work with the regional ridesharing agency for assistance on how to structure a program. A list of interested employees would be generated to match riders, mode choice (carpool vs. vanpool), destination, time of work, and other preferences. Educational information would be developed and distributed to raise awareness about carpools and vanpools, as well as to outline the process for participating. Typically, the economic (i.e., fuel savings) and quality of life (i.e., reduced stress from not driving) benefits are emphasized in the written information.

Kern Commuter Connection is the rideshare effort currently managed by Kern COG. In recent years, the COG has been able to invest little in the development and promotion of the program but continues to provide assistance upon request. Another option would be a privately funded carpool/vanpool program, due to the shortage of public funds for such programs. However, an interested employer may be able to receive tax and other benefits from having a program and/or they may pass tax savings to participating employees.

Kern COG staff would have to initiate a public information and outreach program to encourage key employers to participate directly in the funding and sponsorship of business-specific carpools and vanpools, or to participate indirectly in the facilitation of employee initiatives.

Efforts should initially be concentrated on plants such as BunnyLuv, employment sites in Shafter near Highway 99, and the new businesses locating in the Tejon Ranch Business Park.

Carpool and vanpool outreach investments may minimize the call for expanded transit services to major employer sites that are located outside the effective transit service area or at times beyond the current service span.

Flexroute Services

Flexroutes are a cross between fixed route/fixed schedule and dial-a-ride services. Flexroutes are structured to follow a relaxed schedule with formal time points. The schedule allows for sufficient running time between the timepoints to respond to requests within defined service areas. Flexroutes are often called route deviations, point deviations and zone route services.

Flexroutes are service strategies for lower density service areas with relatively long walking distances that cannot support a fixed route service or for areas with a high percentage of seniors or persons with disabilities. They can also be successful in dial-a-ride service areas where available resources can no longer accommodate all travel requests. Four flexroute services are recommended for Kern County:

- Taft Flexroute
- Frazier Park Flexroute
- Tehachapi Flexroute
- Kern River Valley

Flexroute Operational Requirements, Potential Costs and Implementation Steps

Figure 4-5 provides a summary matrix of the proposed flexroute services, additional costs and the steps necessary to establish each.

Figure 4-5 Proposed Flexroute Services

Description	Additional Costs and Resources	Implementation Steps
Taft Flexroute		
<p>Restructure Taft Dial-a-Ride into a flexroute service based on a zone structure with service assigned to the different zones at different time periods.</p> <p>School trippers would operate at school start/dismissal bells.</p> <p>Designed to increase capacity and service productivity without additional revenue hours.</p>	<p>No additional costs. Flexroute service replaces dial-a-ride service.</p> <p>No new buses required.</p>	<p>Establish zones and schedule.</p> <p>Reprint service brochure and market service.</p>
Frazier Park Flexroute		
<p>Restructure Frazier Park into a flexroute service based on a zone structure with service assigned to the different zones at different time periods.¹</p> <p>Designed to increase capacity and service productivity without additional revenue hours.</p>	<p>No additional costs. Flexroute service replaces dial-a-ride service.</p> <p>No new buses required.</p>	<p>Establish zones and schedule.</p> <p>Reprint service brochure and market service.</p>
Tehachapi Flexroute		
<p>Restructure Tehachapi Dial-a-Ride into a flexroute limited to two separate zones during specific time periods each hour - alternating from zone to zone.</p> <p>Service should be timed to meet the 58 Express at K Mart or near the train station along Tehachapi Blvd. The new service would serve as a local feeder for the restructured 58 Express.</p> <p>Designed to increase capacity and service productivity without additional revenue hours.</p>	<p>No additional costs. Flexroute service replaces dial-a-ride service.</p> <p>No new buses required.</p>	<p>Establish zones and schedule.</p> <p>Reprint service brochure and market service.</p> <p>Implement restructured 58 Express.</p>
Rosamond		
<p>If the new school district demand creates a capacity problem, restructure the Rosamond Dial-a-Ride service into a flexroute service with trippers scheduled around the school start/dismissal bells.</p> <p>Designed to increase capacity and service productivity without additional revenue hours.</p>	<p>No additional costs. Flexroute service replaces dial-a-ride service.</p> <p>No new buses required.</p>	<p>Establish zones and schedule.</p> <p>Reprint service brochure and market service.</p>
Kern River Valley		
<p>Combine dial-a-ride and fixed route into a flexroute service. Reallocate dial-a-ride service hours to increase the total number of trips on Flexroute 1 and 2.²</p> <p>This strategy would address local service duplication, fixed route running time issues and dial-a-ride service capacity issues.</p>	<p>No additional costs. Flexroute service replaces dial-a-ride service.</p> <p>No new buses required.</p>	<p>Establish zones and schedule.</p> <p>Reprint service brochure and market service.</p>

¹ For example, the service could operate an east sweep for 30 minutes followed by a west sweep in the next 30 minutes. Time points could be established at the Post Office and the Flying J.

² Limit Flexroute 1 time points to Tobias/Kernville Road, Wofford Heights/Panorama, Kern Valley Plaza, County Administration Building and the Vet. Hall/Senior Center. Flexroute 2 time points would be limited to Easy Street/Hwy 178, Power's Track, South Fork School, Southlake Plaza, Kern Valley Hospital, County Administration Building, Vet. Hall/Senior Center, and Kern Valley Plaza. Flexroute service to Kern Valley High School would be

Consolidated System Service Plan

Consolidating transit service planning and developing of a transit service plan at the county or regional level can have many service quality and cost benefits. This is especially true in an area the size of Kern County where funding and administration staff resources in the smaller communities tend to be stretched thin.

Developing uniform service performance and design standards can ensure the equitable provision of service throughout the county. A centralized approach can address the constraints faced by small transit operations that do not have staff resources to handle workloads beyond the ongoing day-to-day administration and problem solving. Economies of scale are possible through bulk purchases of buses and other equipment, as well as service operations and management contracts. Further cost savings may be possible by eliminating some of the duplication between local and regional services.

Reflecting Local Requirements and Service Needs

In a county as large as Kern, transit service needs and operating conditions vary significantly from community to community. Within the County of Kern, there are large and small urban transit systems, intercity commute and lifeline services, and small community dial-a-ride services. Each transit mode is designed for the specific, local public mobility needs and operating conditions.

A consolidated service plan must reflect spatial variations in need, markets and operating realities. It must recognize rural and urban, as well as local circulation and regional commute differences. Planners must be versatile and develop evaluation criteria, service standards and service strategies that reflect these variations.

Local Decision-Making

Local buy-in and decision-making are critical to the success of a transit service plan.

The community that helps plan its services has a stronger sense of ownership of the services and a desire to make them work. Regional transit service planners should function as consultants or extension planners to the individual agencies or communities, and provide alternatives to best meet their needs and budget. They should help local agencies understand a broader regional planning perspective and funding allocation to better satisfy both local and regional travel needs. Local needs and proposed changes should always be contexted within a broader regional good.

limited to the start/dismissal bells. Local service in Kernville, Bodfish and Lake Isabella would be limited to demand response service during a period of time that the buses are laying over in Lake Isabella and Kernville. Sufficient time would be built into the Flexroute 1 and 2 schedules to provide service on a request basis in these communities and along the existing Highway 155 and 178 routing.

The local decision-making process should incorporate both local political and public representation.

Service Standards and Policies

A consolidated service plan requires a set, or menu, of consistent service standards and policies. Consistent service standards and policies allow the countywide evaluation of service performance, and the equitable design and planning of services throughout the county. The adherence to standards enables the establishment of service priorities based on the level of need and a consistent assessment and response to expressions of unmet needs.

Many different types of performance standards and their measures have been developed and proposed for Kern County's local and intercity transit services. Recommended performance standards are included in the document Appendix.

Overall Service Design

Regional transit service design benefits from a consistent set of service performance and design standards and a consolidated planning function. Consolidated service implementation can reflect:

- **Planning without regard to jurisdictional boundaries.** The allocation of funding and resources based on priority needs and markets (where transit is needed most in the County and service to key County destinations) is essential under consolidation. This allows for equitable service coverage throughout the county and a comprehensive assessment and prioritization of unmet needs requests within a regional context.
- **Better resource allocation.** Appropriate service design includes the minimization of service overlaps and duplications for a more rational allocation of resources. Another result is the effective integration of local and regional services – local dial-a-ride services acting as feeders to intercity commute services with planned connections. This could streamline express services and reduce onboard travel time for passengers as local service extensions are reduced.
- **Consistent service policies and parameters.** Riders are more comfortable using various services when policies are consistent. It is a way of simplifying regional transit and paratransit for riders.
- **Consistent look and feel.** A consolidated system has a standardized vehicle and bus stop design, as well as consistent transit service “branding.”
- **Comprehensive operating policies and procedures.** In addition to consistent and familiar procedures with standardized staff training protocols, there is comprehensive and consistent customer service and public information.
- **Interconnectivity.** This is about planned and publicized connections with state and national transportation, such as Amtrak, Greyhound, airline connections via Meadows Field, and future high-speed rail services. It also integrates Kern County's

transit services better with neighboring transit systems in Ventura, Los Angeles, San Bernardino, Inyo-Mono, Tulare and San Luis Obispo Counties. Consolidation also provides a better opportunity to develop fare reciprocity both within the county and with neighboring county transit services.

Remove Duplication

The proposed short-term service recommendations listed earlier in this chapter are areas where consolidation could even further enhance the benefit to riders and operators. Examples of these strategies that address service duplication issues include the following:

- **North Kern Express** – The proposed changes include the operation of the North Kern Express as a local service in Delano before operating as an express to Bakersfield.
- **Tehachapi Flexroute** – The introduction of a flexroute service in Tehachapi would act as the local feeder to a more streamlined 58 Express. The reduced time on the 58 Express would reduce the running time and passenger travel time on the route between Mojave and Bakersfield.
- **Kern River Valley** – The replacement of the current dial-a-ride and fixed route services with a flexroute would reduce the duplication between the two current services. This would increase service frequency within the Kern Valley service area without adding service hours.

Potential Service Cost Savings

Developing and implementing a consolidated service plan should result in cost savings through the reduction of service duplication and other economies of scale (bus layover in multiple locations, opportunities to through-route local and intercity buses, shared fueling and maintenance facilities, etc.). When duplicative services are eliminated, additional service hours and resources become available. These can be put back into service to increase frequencies or extend service span, or they can be removed from service to reduce overall operating costs.

Reduction in Hours

Service hour reductions can be achieved as local and regional services are better integrated. This reduces service duplication when two services compete for the same market and reduce overall productivity, thus reducing farebox recovery.

A countywide approach to service planning will provide a forum to proactively avoid future service overlaps when service expansion is being considered. A consolidated plan can reduce total hours by developing an integrated system where local community circulators complement regional services.

Reduction in Service Costs

Service cost reductions can be achieved in a consolidated service plan. Cost savings can result through:

- **The reduction of service duplication** – reduced revenue hours or the reallocation of service hours for expansion into new areas (or increases in service frequency).
- **The introduction of lower cost service alternatives** – the replacement of poorly performing lifeline bus services with volunteer driver reimbursement programs, subscription buses operated as trippers and carpools and vanpools for destinations that transit does not serve well.
- **More competitive contract service bids** – through the combination of numerous individual services under one RFP. Also through the consolidated procurement of consulting and marketing services and materials.
- **Lower bus/vehicle prices** – through a consolidated countywide procurement effort.
- **Lower inventory costs** – through countywide fleet standardization and the bulk procurement of parts, fuel and supplies.
- **Other economies of scale** – through the centralized provision of service monitoring, evaluation and planning services.

Next Steps

Short-term strategies include the implementation of service recommendations outlined in this chapter. Recommended for consolidation are as follows:

- **Adopt goals and service standards.** Review, modify and adopt a set of service standards for all rural and small city transit services in Kern County.
- **Develop a status quo service strategy.** Using the current services as a baseline, map all rural and small local transit services in Kern County. Identify an operating plan for all services that allows for the seamless sharing of buses, fueling and vehicle storage countywide, etc. For the service plan, it may be appropriate for local fixed routes to be through-routed to intercity services that become local services again in another jurisdiction.
- **Develop a service improvement plan.** A creative operating plan that allows for the provision of service without regard to jurisdictional boundaries is likely to uncover underused vehicles that can be redeployed as other services or that can be used to improve frequencies on existing services. Likewise, the plan's efficiencies could account for some vehicles to be pulled from service to reduce overall operating costs.
- **Define a service deployment timeline.** Begin the process of coordinating services so that current transit providers and their customers can become accustomed and easily transitioned to the eventual rural consolidated transit system.

Chapter 5. Marketing

Introduction

Marketing is about providing information to the public about transportation services that are available. Transportation marketing is primarily about providing good information to assure users that they have made the right decision to ride. Another important emphasis of transportation marketing is to attract new riders. The advantage of marketing coordination is the potential to provide more information with fewer resources because the various agencies are working to reduce duplicative efforts. In addition, smaller agencies that were previously unable to develop informational materials or provide certain marketing resources benefit from the experience of and collaborative process with other larger coordinating agencies.

This chapter has two objectives: (1) to identify a process for short-term marketing coordination and (2) to recommend necessary elements of a consolidated system marketing plan.

In relation to transportation coordination, marketing and public information play any number of roles. They can build public support for a coordination effort. They can attract riders to the coordinated service. Depending on the level of coordination and the extent of the services being provided, coordination can provide several marketing-related benefits. Nevertheless, the most important priority in the short term, based on the analysis and input from the many stakeholders interviewed early in this process, is to improve the consistency and availability of public information in Kern County. An immediate opportunity for enhanced coordination is ***the development of a single informational resource about transit services*** (a comprehensive information brochure or web site). This is the emphasis of the first part of this chapter.

Certainly other coordinated marketing is plausible in the long-term and should be considered in conjunction with advanced coordination among Kern County's transit providers or a consolidated service. Two other marketing efforts that could also be implemented through a coordinated effort include (1) a shared advertising campaign (joint marketing efforts, newspaper advertisements and radio spots) and (2) development of a unifying theme and image for public information, such as shared vehicle design and bus stops.

Immediate Opportunities for Coordination: Comprehensive Information Resources

Development of coordinated information resources for Kern County's transit providers is identified as a priority for several reasons. Most importantly, coordinated public information resources provide the following:

- A single place for riders to obtain information about all services.
- One location for social service agencies, schools and hospitals to get information for clients.
- A unified, consistent format for providing information to the public.
- Regular procedure for keeping information updated.
- Pooled resources facilitate providing information in alternative formats and other languages.
- A first step in the process of more extensive coordination and consolidation of services.

As part of regional coordination of public information, two projects are recommended: to produce a comprehensive countywide information brochure and develop a countywide transit information web site. Because both efforts require careful coordination of similar informational materials, they are described together as the recommended undertaking for Kern County's first coordinated marketing effort.

Countywide Information Brochure and Web Site

Kern County's transit providers are encouraged to work together to develop a countywide information web site and brochure or series of brochures. We recommend the development of information for the brochure first, and then translating the information to an electronic format appropriate for a transit information web site. The Kern COG Transit Operators' Group may provide an appropriate forum for coordination of this effort, as well as collection and assembly of information.

Brochure

For the brochure, two options are suggested.

The preferred option is to develop – and update regularly – a single information brochure for Kern County's transit services. Because of the county's geography, an option would be to develop separate brochures in the same format for East Kern and West Kern transit services. A comprehensive brochure such as this requires a high level of coordination among Kern County's transit providers.

Requiring only somewhat less coordination would be a series of brochures about individual services and routes (similar to the route and dial-a-ride service brochures currently produced by KRT). These brochures would be designed according to a standardized format about the individual service. The route information could also be assembled into a booklet format.

Key issues to consider in the development of the brochure are as follows:

1. Agreement on parameters of general information brochure. This includes shape, size, design (colors, paper, graphic layout), languages, cost and distribution.
2. Creating a transit system information submittal template. All transit providers should submit information for the brochure in a uniform format. Crucial elements of the brochure may include:
 - Service Hours
 - Fixed Route schedule
 - Flex Route schedule
 - Dial-a-ride service area and hours
 - Dial-a-ride eligibility
 - Fare¹
3. In developing a user-friendly, easy-to-understand brochure, a comprehensive map of Kern County's transit services is recommended.
4. The brochure may require several edits. The committee should determine a process for soliciting edits and making changes. The committee might specify a limited number of "rounds" of edits.
5. Acquisition of bids for the design and printing of the brochure.
6. Identification of a plan for distributing the brochure to communities throughout Kern County.

Web Site

Information collected and submitted for the brochure can be adapted for the web site. Some opportunities for presenting information on the web site include the following:

- Preparation of a map of Kern County whereby users could click on individual cities or regions to identify the services available in the area.
- Uploading a map of all transit services.
- Providing PDF files of schedules and service information that users can download and print.

¹ Ideally, in advance of marketing coordination, fare classification categories should be uniformly adopted countywide (e.g., youth, student, senior) so information can be concise and easy to understand.

- Listing all transit providers in the county and provide a separate information page (or multiple pages, depending on number of routes and services) for each.
- Creating a series of matrices that allows users to identify available routings, dial-a-ride services, and fares between or within communities.
- Provide translation of the web site information. A Spanish translation would be appropriate for many of Kern County's transit users.

Web site development includes a number of responsibilities. Kern COG, Kern County and other agencies have experience developing and maintaining web sites. In addition, there are numerous web site developers, including firms and individuals that specialize in the design of transit-focused web sites. Elements of the web site design process include the following:

- Layout, color selection, navigation, graphics and background
- Preparation of web page content and any necessary forms in HTML
- Adding images to make the site interesting and useful
- Setting up the web server for the web site and domain
- Adding keywords (e.g., "Kern bus") to the web pages to facilitate users finding the web site using search engines
- Submission of the web site to popular search engines
- Maintenance and updates to the web site after it is completed and on-line

Responsibility for Oversight

Under a consolidated system (or some degree of administrative consolidation), it is anticipated that the lead agency would have the primary role in marketing and providing public information for the transit system. However, with the current combination of transit providers, one agency or organization should assume responsibility for the overall public information coordination effort.

Three entities are best suited for managing this undertaking:

- **Kern COG.** Kern COG is responsible for overseeing countywide transportation plan. Kern COG also oversees Kern Commuter Connection, the county's rideshare program. Thus, Kern COG has experience in promotion and marketing for transportation services. The advantage of Kern COG taking the lead in a marketing coordination effort is that the COG is familiar with all of the transit players and is involved in oversight and coordination. The disadvantage is that Kern COG's experience in marketing is limited, and staff may not be able to assume additional responsibilities.
- **Kern County Roads Department/KRT.** KRT has experience with preparing informational materials for the services it provides. It also has placed route and

service information on its website at <http://www.co.kern.ca.us/roads/kernregionaltransit.asp>. The advantage of KRT overseeing a regional public information effort is that the department provides the majority of rural transit services in Kern County and has developed a regional service brochure in the past. Disadvantages are limited staff resources and perhaps some skepticism by other smaller providers about KRT's role in coordinating a marketing effort.

- **GET.** Marketing staff at GET has expressed a willingness to provide support for marketing for Kern County's rural operators. The advantage of GET's involvement is that the agency has experience with large successful marketing campaigns, including outreach and the development of public information materials and a web site. (The disadvantage is that GET has other priorities: local bus service in Bakersfield and the agency's long-term commitment to marketing for regional services is uncertain.)

GET would perhaps be the best lead in the short term if the agency has the marketing staff to coordinate the public information process. For the longer term, the responsibility should be transitioned to an organization with direct rural transit planning and operating experience. Either Kern COG or KRT, depending on staff availability, would be a logical project leader in this area.

Consolidation of Transit Services: Development of a Marketing Strategy

The recommended coordination efforts described above put into place basic marketing elements that can easily be simplified and further built upon under a consolidated system. The role of marketing under a consolidated system is to create a unified look for the system, present a comprehensive network to the public, provide a single telephone information and/or reservations number, etc. Thus, marketing for a newly consolidated transportation service is a large and complex topic. We have recommended a process for developing a consolidated marketing plan that emphasizes the importance of market research and developing resources for a consolidated system. These are key steps for the development of a marketing strategy or a plan; they are not steadfast rules, but can be used to guide a transportation coordination marketing effort.

Identify the Audience

It is essential to identify the audience for consolidated transportation marketing and public information. Some examples of different audiences and the marketing/public information issues that arise are as follows:

- **Schools, Employers, Medical Facilities and Social Service Agencies.** Elements to emphasize may include "easier to coordinate transportation services for your clients" and "transportation services have better focus on regional needs."

- **Transportation/Transit Users.** Elements to emphasize may include “easier to ride the bus and make connections,” “better access to information,” “one-stop shop for transportation needs and customer support (‘the buck stops here’).”
- **General Public.** Elements to emphasize may include “better alternative for rural Kern County,” “cost savings or no tax increase,” “easier for people who use transit to travel in Kern County.”

Conduct a Marketing Resource Assessment

Before marketing a consolidated transit service, it is useful to evaluate the pre-consolidation marketing organization and public information efforts. Ideally, Kern County’s transit providers will already have worked closely together to develop a coordinated information brochure and/or web site, but we expect that some individual marketing efforts would still take place. *Conducting a marketing resource assessment* is a good tool to identify work already underway or successful, including some of these minor efforts that could be folded into a consolidated marketing approach. Elements to review as part of this assessment include the following:

- **Current Marketing.** Review current marketing staff at the various agencies, organizational structure, resources and products. Evaluate the public information tools that are working successfully, as well as those that are unsuccessful and determine if any might serve as a good model for Kern County’s coordinated information tools.
- **Transportation Markets.** Identify all of the markets currently using transportation services and those likely to continue under a consolidated system framework. Verify the specific public information tools that are required to meet all of the current needs.
- **Responsibilities.** Look at job responsibilities for the new consolidated transit system. Evaluate the lead agency’s potential to carry out a new systemwide marketing effort and whether staff has necessary specialized skills.
- **Marketing Coordination.** Review existing marketing coordination efforts and identify opportunities for joint marketing with regional transit agencies, social service organizations and business groups.

Develop a Marketing Plan for Kern County’s New Consolidated Rural Transit System

Kern County’s marketing plan should be a useful tool to identify marketing needs, prioritize those needs, and develop strategies to implement priorities. A general marketing plan framework can be applied to the newly consolidated service:

- **Challenges for Transit Marketing.** Identify marketing problems and opportunities.
 - **Marketing Expectations.** Identify the marketing expectations for the consolidated transit agency. The Kern COG Board may have different marketing objectives

than the County Board of Supervisors (or whichever body is ultimately the policy board). In addition, the lead agency may have a specific set of objectives.

- **Agency Responsibilities And Oversight.** Determine the process for getting a marketing plan approved. It is useful to determine whether lead agency staff body may simply be able to approve the plan or if the board or other policy-level body needs to be involved.
- **Agency Identity.** Determine which elements of existing transit system identities are strong. For example, Kern Regional Transit's poppy logo, Ridgecrest Transit System's bus colors, etc., may be prized symbols that could be incorporated into a new system identify.
- **Costs for Marketing.** Determine how the costs for marketing will be budgeted. Most of Kern County's rural transit providers currently have small marketing budgets, if any. The value of an enhanced marketing budget may be a "tough sell."²
- **Current Users.** Current users can be taken by surprise when the system with which they are familiar is transformed into a consolidated system. Contact current users about how the consolidation effort will benefit them and why it is necessary.
- **Marketing Goals.** Develop goals and objectives for marketing and public information for Kern County's consolidated rural transit services. These should reflect any adopted overall consolidation goals. During the consolidation process, all participating stakeholders should agree to these goals and objectives.
- **Target Markets.** Based on stakeholder interviews and the assessment of opportunities, identify the target markets. They should be selected and prioritized to meet the goals and objectives (examples may include senior citizens in difficult-to-serve areas, Mojave commuters, children/youth, social service transportation users, etc.) Considering that each agency — prior to consolidation — may serve very different markets, it may be necessary to prioritize both long short-term and long-term markets to address all needs.
- **Marketing Actions.** Detail the marketing activities required to meet the newly consolidated system's objectives. These might include
 - **Branding.** Identifying a name and concept for the system. Creating a new look for the overall system, including bus design, signage, logo, etc.
 - **Outreach.** Community open houses or special events to introduce the newly consolidated service. Also public speakers available for community presentations and travel training.

² Some of Kern County's agencies have no funds dedicated to marketing and public information. Others have set aside a small percentage of their operating budget for marketing and outreach. A rule of thumb often mentioned by transit providers is that marketing and public information resources should represent at least two percent of total operating expenses. As an initial marketing "push" as part of the consolidation process, marketing costs in the first year can be much higher than in subsequent years. In the case of short-term coordination, all agencies working together must determine how much they can afford to dedicate to marketing.

- **Information Resources.** Enhancements to the unified web site, the development of a systemwide marketing brochure and establishing a telephone call center.
- **Amenities.** Designing information kiosks, bus stops and other resources at transit center and on buses.
- **Distribution Plan.** Disseminating information and distributing printed material throughout vast Kern County.
- **Advertising.** Maintaining support for the system and building relationships with Kern County's transit riders using print, radio, television and electronic media.

Potential marketing products and actions that should be considered for a consolidated transit system in Kern County are described below. Top priority strategies include the following:

- Name for system
- Logo
- Tag line
- Route identification strategy (name and number conventions for routes)
- Signage on bus stops
- Signage on buses
- Telephone services
- Information brochure
- Internet web site
- Rider incentive programs or special marketing programs
- Public forums or a ribbon-cutting event
- Billboards and advertisements
- Press kit (ongoing)
- Comment card/customer feedback procedures
- Ticketing and payment procedures
- **Organization and Responsibility.** Identify which individuals and which agencies will be responsible for implementing the marketing actions.
- **Evaluation.** Determine a process for evaluating the success of Kern County's transit marketing efforts. It is also useful to identify how problems or successes identified in the evaluation process would be addressed. Evaluation tools might include:
 - Public feedback through comment cards, surveys or focus groups
 - Political support
 - An internal analysis of the cost-effectiveness of the marketing effort (for example, changes in passengers per hour on the Shafter-Bakersfield route based on availability of information or the introduction of new amenities and resources).

Considerations

There are three key stages when marketing will be essential and public support is advantageous.

First, transit and transportation providers beginning the process of moving toward consolidation of their services will need public support as they undertake the intensive coordination effort necessary. Many current users and stakeholders will have strong opinions and it will be useful not only to gather information from them, but also to provide useful information about the process and milestones to them.

Second, once implementation of the consolidated service is underway, there may be some growing pains while the services in Kern County are adjusted to meet the new objectives of the coordination effort. Providing comprehensive information and good customer service will help reduce user disenchantment and keep political leaders satisfied with the consolidation effort.

Finally, once the services are fully consolidated, maintaining contact with users, agencies and the public is important to assure community visibility and establish a positive identity for the new system.

Next Steps

This chapter identifies two separate priorities for Kern County's rural transit services. The first is a short-term coordination project whereby transit providers would develop coordinated public information resources.

1. **Identify a lead organization or individual to oversee and facilitate the process.** This could be a representative of any of Kern County's transit agencies (GET has indicated some interest in the role), Kern COG or Kern County. This effort could also be overseen by an outside consultant or other organization.
2. **Build support among transit providers.** Kern County's rural transit providers need to support the process by attending meetings, providing information for the materials and working together to develop informational materials.
3. **Establish regular meetings.** Bring transit providers together and assign responsibilities and deadlines for different tasks. Use the meeting as a means to discuss other coordination issues and to evaluate the marketing effort. The Kern COG's Transit Operators Group may be an appropriate forum for the discussion.
4. **Develop content and materials, web site.** Develop a more detailed process and carry out the steps for the brochure and website discussed beginning on page 5-2. Overall tasks include the following:
 - Collect accurate and complete information.
 - Develop text.

- Design brochure and web site.
- Provide appropriate translations.
- Put web site on-line and print materials.
- Produce brochure in alternative formats upon request
- Establish brochure distribution network.
- Monitor and update as needed.

Chapter 6. Administrative Responsibility

This chapter begins by reviewing the current administrative structure of transit services in the County. It then identifies alternative administrative options under a consolidated transit system and reviews the major advantages and disadvantages associated with each. Although this report does not estimate potential administrative cost savings, the steps necessary to undertake this important analysis are identified. The chapter concludes with a series of recommended steps for Kern County to determine a course of action.

Current Administrative Structure and Responsibilities

The administrative structures of the 12 transit services in the County are presented in Figure 6-1. For most of Kern County's transit providers, the day-to-day administrative functions are handled by three to four different departments, with one department assuming a lead role. In many of the cities, the Community Services, Finance and Public Works Departments have a major role in administering transit services with other departments or specialists assuming a support role. The number of staff or full time employee equivalents (FTEs) who devote time to transit service functions varies between cities with the majority of staff dividing their time between transit and other city services.

Organizational Models

If Kern County were to consolidate all or some of its transit services and functions, there are several organizational models that may be relevant and appropriate. A brief description of each model, its potential applicability in Kern County and its major advantages and disadvantages are presented in Figure 6-2.

Lead Agency Options

Kern County may elect to proceed cautiously, beginning with interim steps in the next few years by enhancing coordination and considering administrative consolidation. With these interim steps, a consortium or multiple operator agreement would be appropriate. Since a longer-term goal is full consolidation, the Joint Powers Authority (JPA) model is identified as the most appropriate organizational model for Kern County. As illustrated in Figure 6-2, this is the most common model for two or more entities consolidating services. JPAs are also easily formed.

Assuming the JPA is the preferred model in Kern County, the key questions are:

- Who would be the lead agency?
- Should it be an existing agency in the county or should a new agency assume this responsibility?
- What are the major roles and responsibilities of a lead agency?

Figure 6-1 Administrative Structure – Transit Services in Kern County

City	City/Agency Staff	Service Type	Staff and Major Areas of Responsibility
Arvin	City of Arvin Community Services Department	1 Fixed Route Dial-a-Ride	1) Director of Community Services - manages transit program 2) Finance Director - programming funds
California City	California City Department of Public Works	Dial-a-Ride	1) Director of Public Works - coordinates transportation studies, analysis and project programming 2) Director of Finance - programming funds and submitting financial reports
Consolidated Transportation Services Agency (CTSA)	North Bakersfield Recreation and Park District	Paratransit	1) Community Services Supervisor - prepares annual budget, submits TDA claims, manages grants, reports to Assistant Director of NBRPD 2) Operations Manager - supervises drivers, dispatches, oversees daily operations 3) Finance Manager - finance management provided by NBRPD
Delano (DART)	City of Delano Community Services Department	3 Local Fixed Routes Dial-a-Ride	1) Community Services Director
Golden Empire Transit (GET)	GET Transit District	Fixed Route (18) Dial-a-Ride	1) Executive Office - reports to Board 2) Deputy Chief Executive Officer - operations, maintenance, finance 3) Manager of Marketing and Service Development - marketing, customer service, development of SRTP 4) Human Resources Administrator - employee relations, claims, training
Kern County (KRT)	Kern County Roads Department - Division of Resource Management Agency	12 Intercity Fixed Routes 1 Local Fixed Route Dial-a-Ride	1) Transit Systems Coordinator - reports to Director of County Roads, oversees operations and contracts, analyzes performance, coordinates with public and private interests 2) Associate Planner and Transit Specialist - manage daily operations and fulfillment of service contracts, research, planning 3) Accounting Clerk - administrative support
McFarland	City of McFarland	Dial-a-Ride	1) City Administrator - serves as Transit Systems Coordinator to provide management, budget development, monitoring 2) Associate Planner - research, design, grant and administration duties 3) Transit Specialist - operations, monitoring and maintaining contract agreements, administering surveys and reporting 4) Accounting Clerk - accounting and administrative support
Ridgecrest (RTS)	City of Ridgecrest	2 Deviated Fixed Routes Dial-a-Ride	1) Finance Director - oversees operations, grant writing 2) Staff - support
Shafter (STS)	City of Shafter	Dial-a-Ride	1) Administrative Services Director - oversight 2) Community Services Director - vehicle maintenance
Taft (TAT)	City of Taft Public Works Department	1 Local Fixed Route Dial-a-Ride	1) Director of Public Works - administers studies, multi-modal planning, analysis, subarea studies and programming 2) Director of Finance - programs funding 3) Dispatcher - dispatches, fare reconciliation and reporting, schedules driver assignments
Tehachapi	Kern Regional Transit	Dial-a-Ride	1) Tehachapi Finance Director - programs funding, TDA reporting 2) Finance Department Staff - processing invoices 3) KRT/Kern COG - transit planning
Wasco	Department of Public Works	Dial-a-Ride	1) Deputy Director of Public Works - daily supervision, manages city's vehicle maintenance shop

Figure 6-2 Organizational Models

Organization Type	Description	Key Features/Characteristics	Applicability in Kern County	Advantages	Disadvantages
Consortium	Several transit agencies cooperatively work together to improve coordination or move toward consolidation. Typically form to address special projects.	No formal staff, Agencies share tasks, and All actions must be agreed to unanimously.	Relevant for transit services to cooperatively participate in special projects or new intercity services.	Transit agencies/cities continue to function independently.	No formal jurisdiction, Agreement must be unanimous requiring sign-off by each participating Council or Board.
Multiple Operator Agreement	Two or more transit agencies enter into agreements for special purposes.	Agencies remain separate with specific responsibilities and/processes for carrying out agreements.	Limited number of agreements currently in place for cost-sharing.	Maintains autonomy and limits staff resources to specific function(s).	Each city/agency remains autonomous limiting opportunities for longer-term consolidation.
Administrative Consolidation	One agency assumes responsibility for day-to-day administration of two or more agencies.	Administrative responsibilities are planning, budgeting, and monitoring and other routine functions of a transit service.	May be relevant for one or more of the smaller cities to “pass on” administrative duties to another entity.	Alleviates burden of handling myriad administrative functions of a transit service No change in policy board oversight – maintain local autonomy.	Uncommon practice because difficult to administer service for another city or county. Each jurisdiction has unique processes and procedures.
Sub-Regional Consolidation	Two or more agencies consolidate along-subregional geographic boundaries.	Similar to full consolidation although on a smaller scale.	Could divide County in two or more sub-regions: 1) East Kern and 2) West Kern County.	Easier to plan for intercity/inter-jurisdictional services and routes.	Requires two new policy boards May be just as complex as full consolidation resulting in two new agencies.
Full Consolidation • Joint Powers Authority (JPA) • Transit District	All local and regional transit services consolidate under one single entity.	Individual services/systems would operate as one system – one set of routes, one fare structure, etc.	An existing agency could become the lead agency or a new agency could be formed. A JPA is most common.	A JPA has decision-making authority and does not require special legislation. JPAs can be established relatively easily. Creating a transit district requires legislation action and enables taxing authority.	JPAs limit autonomy of individual agencies and/or jurisdictions. Climate for increasing local taxes needs to be carefully considered.

- What are the administrative cost savings? Is there a differential in cost savings under one lead agency versus another?

The lead agency would assume all administrative functions such as routine tasks in overseeing a transit system's daily operation, as well as the planning, financing and overall performance monitoring of a system. The major responsibilities of the administrative or lead agency are:

- Contract oversight
- Short and long-term planning and scheduling
- Analysis of system performance
- Fare policy, including structure and pass arrangements
- Capital improvement programming and grant applications
- Annual federal and state reporting requirements
- Monitoring federal and state legislation
- Marketing and advertising

As Kern County pursues a wider array of transportation services including vanpooling, carpooling, volunteer driver programs and subscription bus services, the roles and responsibilities of the lead agency go beyond administering traditional transit services. The lead agency management and staff will need to be well versed in planning and implementing a family of services to respond to diverse countywide needs.

As presented in Figure 6-1, each city and the County currently has its own structure for administering transit services. Under a consolidated system, all administrative functions currently being performed under separate agencies would be performed under one administration.

There are three practical options for the administrative or lead agency. They are:

1. Kern COG
2. Kern County (with three possible departments as the lead)
3. A new agency (JPA)

The advantages and disadvantages of these options are discussed below.

Kern Council of Governments (Kern COG)

The major advantage of Kern COG serving as the administrative agency is that it has a regional perspective. As the regional transportation-planning agency for Kern County, it is very familiar with the transportation and transit issues of the incorporated cities and the unincorporated county. It is not, however, very common for a council of governments (COG) to be in the business of transit operations. One successful example worth noting is the San Benito County

COG. This COG administers a local city service in Hollister and inter-city services to neighboring Santa Clara County.

A major disadvantage with this arrangement is that there appears to be an inherent conflict of interest, given that the COG would be allocating TDA funds to itself for transit operations. More importantly, Kern COG has expressed no interest in taking on this responsibility given the wide range of responsibilities it currently assumes. It also has limited staff resources to carry out these functions.

Kern County

There are three possible departments that could serve in a lead role if the county were to manage one consolidated rural transit system. They are:

- Roads Department (Resource Management Agency)
- Other existing department
- A new department

Roads Department

The Roads Department has several years of managing KRT. The Department handles transit operations, planning, budgeting and all other requirements of managing fixed route and paratransit services. The Department's dedicated transit staff is knowledgeable and experienced in all aspects of planning and operating transit services. They are very familiar with many of the communities in which KRT is operating. This suggests that the Roads Department would be well positioned to take a lead role if the County is interested in assuming this responsibility. A potential conflict with having the Roads Department manage transit service is competing priorities. The mission of the Department is primarily related to road design, construction and maintenance. Transit can be less "visible" when administered as a function of the Roads Department.

Other Existing Department

There are over two dozen departments in Kern County. If the County were interested in another department assuming a lead role in administering transit services, it could be any number of options. The likely candidates would be the County's Administrative office, the Community and Economic Development Department or perhaps the Planning Department. These departments do not currently handle transportation issues and there would be a steep learning curve if they were to assume such responsibilities. While this report is not recommending a transition to a new department, if transit services were to consolidate, the County may prefer to assign this complex function to another department. Current transit staff in the Roads Department could be transferred to another department to build the level of administrative expertise necessary to operate the service.

New Department

The County could elect to create a new department devoted exclusively to public transportation. The rationale for doing so is to establish and devote a department to a single purpose, and elevate the profile of public transit in Kern County. The major advantages are that a new public transportation department would have a single focus and would be able to devote 100% of its time to public transportation services. The County may feel it is inappropriate and not necessary to establish a new department and that the existing structure works fine. Nevertheless, should the County express interest in assuming a lead role for a consolidated transit system, it may be worthwhile to further explore this option.

New Agency

Another option for a lead agency is to create a new agency. The most common arrangement when two or more agencies administer a public service is a JPA. JPAs are formal decision-making bodies created to provide a specific service (i.e., water service, waste management, fire suppression, regional transit services, etc.). JPAs are generally very formal organizations with a voting board, ruled by majority rather than consensus voting. JPAs generally have an assigned staff and an annual operating budget funded by the participating agencies. The assigned staff could be an existing agency (such as Kern COG or the County) or a new staff could be hired by the JPA to administer the service.

A JPA can apply for and administer grants and can receive tax revenues or other funding from participating jurisdictions, although it cannot introduce tax measures for financing its work. In some counties, such as Yolo County, a JPA was first established to consolidate transit services in the County and later a Transit District was created (requires special legislation) to have the authority to initiate a local sales tax measure.

Potential Administrative Cost Savings

Although not the only reason, a primary rationale for consolidating transit services is to realize cost savings. Typically administrative costs represent between 15% and 25% of total transit system costs. The percentage varies by size of agency, level of service provided (as measured in hours and/or miles), the agency structure and organization, and other related factors. Even though the administrative costs represent a smaller proportion of system costs than “putting service on the streets,” it is still valuable to estimate whether there would be administrative cost savings under a consolidated system. If cost savings were realized, it would be because functions now performed by two or more agencies could be carried out by one agency. This could eliminate duplicative functions and/or reduce costs through economies of scale. Although estimating cost savings in Kern County is beyond the scope of this project, a step-by-step method for determining cost savings is outlined as a next step in this process.

Reduction in Duplication

It is logical to believe that by consolidating transit services, there would be a reduction in administrative tasks and costs. Some reduction in administrative costs could be attributable to a

decline in direct costs such as printing of tickets and brochures or telephone expenses through economies of scale. Other administrative cost savings could be due to a reduction in labor costs by eliminating duplicative functions such as preparing grant applications or year-end reports, and monitoring and tracking contractor performance.

As previously mentioned, this report does not project administrative cost savings. Since this is a valuable and important step, the following section outlines the process that should be undertaken to document current administrative costs and projected savings. It is understood that each city is unique in its organizational structure. Each city follows different methods for conducting and tracking administrative tasks and associated costs. The process outlined below is sensitive to the uniqueness of each city and the county in administering transit services.

Process For Determining Cost Savings

There are four basic steps in projecting operating cost savings under a proposed consolidated system. They are described below:

Step 1: Document and Capture Existing Administrative Costs at Each Entity

Since the existing administrative costs will form the baseline from which to compare administrative costs under a consolidated operation, it is extremely important to fully understand the current cost basis. The first step is to get a breakdown of the city's and/or transit division's budget and incurred expenses for a two-year period. It is our experience that costs can vary widely from year to year because of one-time big ticket expense items making it worthwhile to review two years of expenses. From these reports, prepare a further breakdown of transit costs into three or four categories:

- Operations/Maintenance
- Capital (one-time major purchases)
- Administrative
- Other (could include depreciation and other miscellaneous expenses)

Since this step is to understand not only how much is spent on administration, but to also understand the categories of administrative expenses, it will require a further breakdown of administrative expenses. For example, if personnel costs are included in administration, it is important to know the FTEs charged to transit and in which department(s) they work. For example, staff in the Human Resources and Finance Departments may devote a portion of their time to transit. To fully understand administrative expenses, it is necessary to review expenses with City (agency) personnel.

Step 2: Review with City (Agency) Personnel

After preparing draft spreadsheets, they should be reviewed with City or transit agency personnel to further define individual cost elements. While it may seem obvious what the term "marketing" means, it is possible that it includes printing of marketing material, marketing

consultant services or public information distribution costs. Personnel costs should be further defined to understand the number of FTEs, their primary function and department. These are critical steps to understand whether all costs associated with transit are captured and documented. Our experience is that cities typically underestimate their full and complete administrative costs by inadvertently omitting personnel time (and costs) incurred by Legal, Human Resources, Purchasing and other departments. A telephone call or face-to-face interview to review in detail all administrative expenses and understand how they are tracked is an important step in fully documenting current administrative expenses.

Step 3: Estimate Administrative Costs Under a Consolidated System

This step is the most subjective of all the steps because it requires three basic assumptions to estimate the administrative costs of a consolidated system:

1. Determine lead agency
2. Estimate the number and type of personnel required
3. Estimate salary structure/wages

The first assumption is closely tied to the agency that assumes the lead role in administering services. It is likely that estimating costs will occur in advance of this decision. This means that cost estimates may have to be made under two or three different scenarios because the number and type of personnel required – and the salary structure – would not be the same for all lead agencies. The number and type of personnel with transit planning and operations expertise may not vary with different lead agencies, but the number of supporting personnel could vary tremendously.

This would require a projection of the level of full time dedicated staff to transit service and part time personnel who would “charge” a percentage of their time to transit. The salary structure for all personnel could also fluctuate based on which agency is in the lead. It may be prudent to project costs based on a low – medium – high cost scenario at this preliminary stage and refine them as the consolidation review progresses.

Step 4: Compare Existing with Projected Costs

The final step is to compare existing administrative costs with projected costs to determine if there would be annual operating savings. All assumptions would be documented so refinements could be made at a future date.

Next Steps

There are two recommended steps that Kern COG should pursue before making a decision about the administration of a consolidated transit system. They are:

1. **Determine level of interest for a lead agency.** This chapter presented three options (with three alternatives under one option) and reviews the major advantages and disadvantages associated with each. The next step is to determine which agency or agencies are truly interested and willing to assume this new role. Based on the level of interest, the options should be narrowed down to one or possibly two agencies.
2. **Refine cost savings projections.** Narrowing down the options for a lead agency will allow further refinement and more accurate projections of annual operating cost savings under a consolidated transit system.

Chapter 7. Cost Sharing

Overview

In the short term the 12 transit services in the County will continue to function independently while they enhance their coordination through joint marketing and public information activities (refer to Chapter 5). ***As independent services, it is relevant to explore cost sharing for the intercity services*** because all cities in the County benefit from this regional service.

As the regional service provider, Kern Regional Transit provides a countywide service. Nevertheless, the cost of providing this service is not shared by all who benefit from it. If the cities in the County were to financially contribute to the intercity service, it could provide them with a stronger role in determining how and where the service is delivered. This chapter explores cost sharing arrangements for KRT as a short-term option. The chapter concludes with a discussion on uniform fares.

In the longer term if services are consolidated under one system, fixed routes and other transit services would likely be modified and streamlined to improve service coverage and provide better timed connections. There will still be a need for cost sharing, although it will be approached regionally and comprehensively rather than by individual service.

Current Cost Sharing Arrangements

Cost sharing arrangements are a compensation mechanism for cooperatively funding transit services. At the local level, services typically are paid for by the local jurisdiction. Individual services are funded by the local cities through a combination of TDA funds, passenger fares, and in some cases federal funds and other miscellaneous revenues. With one exception, the intercity services provided by KRT are paid for by County revenues with none of the local cities contributing funds even though they benefit from it. The exception is the Ridgecrest-California City-Mojave service.¹ Figure 7-1 presents current cost sharing arrangements for KRT and highlights other special circumstances. Unlike many intercity transit services operating in California that are cooperatively funded by local cities and the county, KRT does not enjoy this type of arrangement. In some cases, the County reimburses the cities of Delano, Taft, Ridgecrest, Shafter and Tehachapi for transit services provided in adjacent areas.

¹ Even still, for this service, the county pays 50% of the operating costs and the other 50% comes from the following split – 1/3 City of Ridgecrest, 1/3 California City, 1/3 County.

Figure 7-1 Current Cost Sharing Arrangements

City	Cost Sharing Agreement
Arvin	Arvin does not contribute to KRT services.
California City	California City contributes 1/6 of the costs of the Ridgecrest-California City-Mojave service.
Consolidated Transportation Services Agency (CTSA)	None
Delano (DART)	KRT provides intercity service between Delano and Bakersfield. Delano does not financially contribute to KRT services. County pays City of Delano to operate DAR service beyond city limits.
Golden Empire Transit (GET)	None
Kern County (KRT)	KRT reimburses Delano, Taft, Ridgecrest, Shafter and Tehachapi for transit services provided in adjacent urbanized areas of the County.
McFarland	McFarland does not contribute to KRT services.
Ridgecrest (RTS)	Ridgecrest contributes 1/6 of the cost of the Ridgecrest-California City-Mojave service. The County pays the City \$45/revenue service hour minus all fares collected. Ridgecrest provides intercity service between Ridgecrest and Inyokern and Randsburg/Johannesburg.
Shafter (STS)	Shafter does not contribute to KRT services. Vehicles jointly owned between City and County (City holds title).
Taft (TAT)	KRT provides 2 intercity fixed routes between Taft and Bakersfield Taft does not contribute to KRT services. Costs to City and County are distributed on the basis of monthly ridership for each party. County pays City for cost of operating County's portion of the transit system.
Tehachapi	KRT provides intercity service between Tehachapi and Bakersfield, but Tehachapi does not financially contribute to KRT services. Service in Tehachapi is provided by KRT, which contracts through First Transit. The DAR cost to the City and the County is the actual cost of supplying the service within each jurisdiction.
Wasco	Wasco does not contribute to KRT services.

Cost Sharing Arrangements in Other Counties

It is valuable to explore how intercity services in other counties are cooperatively funded. Figure 7-2 presents cost sharing information on six other transit systems that provide relevant examples for Kern County.

- In San Luis Obispo County, the intercity service is funded by all the incorporated cities and the County according to a population formula.
- In Merced County, costs are shared according to a funding formula based on service hours. Staff and member jurisdictions feel this is the most equitable approach because it is based on the level of service operated within their community.
- SCAT has relied on a mileage-based funding formula for its fixed route service for over 20 years. When it introduced a Dial-A-Ride service in 1991, the JPA member agencies believed a formula based on residency of ridership was more equitable for this type of system.
- Yuba Sutter Transit and YoloBus consider several factors in their funding formulas.
- In Butte County two factors, population and service hours, are used to share costs of fixed route services.

These examples indicate that there is no single ideal method for sharing transit system costs. Each community adopts a model that meets its unique political, geographic, transit service and funding requirements. While one could argue that a formula based on service hours or service miles is most equitable because it reflects the level of service received, it does not take into account the population of the area (the basis for allocating TDA funds) or the residency of transit users. A combination of factors can be desirable to reflect the complexity involved in developing an equitable funding formula. When combining alternatives it should be done carefully so as not to further emphasize the inequities in a single approach. One disadvantage of a funding formula based on a combination of factors is that it could result in an administrative burden to recalculate on an annual basis.

Short-Term Alternatives: Funding for Kern Regional Transit's Intercity Services

Based on the practices in six other California counties, it is reasonable and appropriate to explore cost sharing arrangements for Kern Regional Transit. With an annual operating cost of about \$1.6 million and fares hovering around 16% of costs, it leaves a funding obligation of roughly \$1.4 million. Since this a regional service enjoyed by residents countywide it seems fair and equitable for all jurisdictions of the County to share in the costs. This would mean that each city might have to contribute a higher percentage of their LTF funds toward transit. The result, however, is that local residents would have continued access to countywide public transit services. At the same time, the cities will have a vested interest in the level and quality of regional transit service.

Figure 7-2 Cost Sharing Formulas in Other Counties

Agency/Type of Organization	Funding Formula	Comments
Merced Transit System <i>(JPA Agreement)</i>	Costs are shared based on service levels (defined as the number of service hours) provided within each jurisdiction.	Each jurisdiction has agreed to minimum (baseline) service levels. Cost increases in baseline service is paid by requesting agency. Any proposed modifications must be agreed upon by all member agencies.
San Luis Obispo County Regional Transit Authority (SLORTA) <i>(JPA Agreement)</i>	The County pays 49% and the City of San Luis Obispo pays 18.8% of the total TDA required. All other cities pay based on their percent of the remaining population (after deducting population figures for the City and County).	The funding formula for this intercity service has been reviewed and refined several times since inception of this cooperatively funded service. The current formula has now been in place for over five years.
South Coast Area Transit System (SCAT) <i>(JPA Agreement)</i>	Funding formula for fixed route service is based on service miles. Funding formula for Dial-A-Ride service is based on residential location regardless of the origin or destination of the trip.	Capital costs are also split according to the funding formula for fixed route services. The percentage share of each jurisdiction is updated annually. SCAT calculates service miles by jurisdiction and tracks passenger data annually.
Butte County Transit Services <i>(separate services under a consolidated administration)</i>	Funding formula for fixed route is 50% population and 50% service hours. Funding formula for Dial-A-Ride service is 50% population and 50% ridership.	Butte County explored transit service consolidation as a two-year consensus building process. Ultimately, administrative consolidation was implemented as a first step toward full consolidation.
Yuba Sutter Transit <i>(JPA Agreement)</i>	Formula is based on four factors: 1) amount of TDA funds available, 2) population, 3) fixed route miles, and 4) number of boardings. Each factor represents 25% of the funding formula.	All communities pay the incremental costs for any service level enhancements based on the funding formula. No provisions exist for a community that wants to enhance its service. Funding formula revisited periodically.
Yolobus <i>(Special Transportation District; previously JPA Agreement)</i>	Cities and county pay a fully allocated hourly cost to the transit operator based on a combined formula of service hours and miles. There are many exceptions based on individual route designs.	Yolobus establishes service levels based on ridership and the unmet needs process. The funding contribution required by each community is adjusted based on service changes.

Cost Sharing Formulas

Many transportation-planning agencies in California have been exploring and implementing new ways to share the cost of local and regional transit services. The goal in developing alternative funding formulas for Kern County's transit services is to identify a range of options. This includes formulas based on service hours, miles and population as well as formulas that use a combination of methodologies. Four different formulas are identified and described.

Population

Population-based cost sharing can be applied to either fixed route or Dial-A-Ride services. A population-based formula considers the total population for each jurisdiction. It requires obtaining the most recently available population estimates from the California Department of Finance. This is a task currently performed by Kern COG for TDA allocation.

The advantage of a population-based funding formula is that it is relatively easy to administer. It does not require additional work or costs beyond routine planning and allocation activity. Some transit agencies that utilize population as the basis for funding allocations narrow their definition of population to individuals who reside within a defined transit service area. For example, only the population within one mile of a route might be considered when determining the funding allocation formula.

Cost sharing formulas in other counties, presented in Figure 7-2, shows that San Luis Obispo County follows a pure population formula and Butte County uses a combination of population and service hours.

Service Quantity (hours)

This alternative is based on units of service provided within each jurisdiction. Units of service is defined as the revenue hours that a vehicle is in service, and excludes scheduled layovers during a route or at either trip end. This definition can be applied only to fixed route services and cannot be used practically for a demand response system. Service hours depend on a number of factors related to the amount of time it takes to complete a route: vehicle speeds, travel distance, routing, road conditions and the number and proximity of stops.

To determine hours for a fixed route system involves a review of route schedules and jurisdictional boundary maps (or GIS analysis) to calculate the number of service hours operated within each jurisdiction. Service hours must be recalculated after making any schedule or service adjustment in order to keep the funding basis reliable and accurate.

Merced Transit follows a formula that uses service hours only. Other agencies agree this approach accurately reflects the level of services received, but elect to substitute service miles and include supplemental factors such as population.

Service Quantity (miles)

Like service hours, this service quantity alternative is based on units of service provided within each jurisdiction. In this case, the unit of service is a revenue vehicle mile. This funding definition is appropriate for fixed route service only; it cannot be logically applied to Dial-A-Ride service. As with service hours, service miles must be recalculated after any service restructuring.

Ridership (or Boardings)

A cost sharing arrangement based on ridership is probably the most difficult to administer. For a fixed route service it could be based on boardings. That is, the number of riders who board in a given jurisdiction would be assigned to that jurisdiction. The basis for this approach is that the city should pay for its residents. This would require a ridership survey to be conducted at a minimum every two years or following any significant service changes. This approach is more often used for Dial-A-Ride services.

Combination of Factors

As previously noted, many transit systems consider several factors for cost sharing. A combination might be based partly on population, partly on ridership, partly on service miles, etc. A combination of factors can be useful when a particular funding factor biases any single jurisdiction. For example, one jurisdiction may have a greater population, but the service hours provided in that jurisdiction – when compared with other jurisdictions – may not be as significant a proportion of overall service hours.

Long-Term: Consolidation

Under a consolidated transit system, cost-sharing is inherently part of the formula. Participating agencies contribute their full costs of providing transit services to the general funding of the consolidated transit system. This includes the dedication of TDA funds to the countywide rural transit system. Any of the cost sharing alternatives discussed in the preceding short-term alternatives for funding intercity transit services on Kern Regional Transit could be modified and expanded to address the funding of a countywide consolidated system.

Next Steps

In order to reliably use these funding formula alternatives requires data collection and evaluation. The data needed for some of the formulas is relatively easy to obtain while other formulas involve extensive data collection efforts, which may involve extra costs to the agency (or Transit Operators Committee) responsible for collecting the data. The recommended next steps in evaluating funding formula options and selecting an equitable approach for KRT are summarized below.

- **Collect Data and Run the Formulas** – Our experience is that it is impossible to select an equitable funding formula in a vacuum. One formula may seem fair and equitable on the surface but when the numbers are applied, the results simply do not “feel right.” After the numbers have been applied to each formula, they should be evaluated against a set of pre-determined criteria.
- **Develop and Apply Criteria** – Because selecting an equitable funding formula is more of an art than science, it is important to have a set of both qualitative and quantitative criteria. Some criteria to consider include:
 - Is this formula easy to administer?
 - Does it negatively impact any jurisdiction?
 - Does it favor any jurisdiction?
 - Is the formula financially feasible for all jurisdictions?
- **Work Toward Consensus** – Experience in other counties suggests that reaching agreement on a cost sharing arrangement or funding formula is not easily achievable. It requires “working the numbers” until all parties are comfortable with their fair share and believe the formula is equitable for all participants. To achieve consensus will require that one agency serves in a lead or champion role to keep the process moving in a timely manner.

Uniform Fare Structure

There is no uniformity in fares in Kern County. Each service has its own fares and set of fare policies. KRT intercity fares range from \$0.75 to \$4.00, depending on the distance traveled. KRT fares for demand-responsive services are one dollar for the general public and \$0.75 for discounted fares. Fares for local fixed route and demand-responsive services vary from \$0.50 to \$1.50. Some of the local services offer passes or discounted ticket books.

None of Kern County’s transit operators currently has an interagency transfer agreement. A pilot interagency transfer program was discontinued because farebox receipts decreased dramatically after the transfer policy was enacted. There are no transfers between KRT intercity routes, but transfers are provided between local services in the Kern River Valley.

An ideal arrangement would be to establish a uniform fare structure and integrated fare policy for all transit services in Kern County. This would be a necessary pre-requisite under a consolidated system and would enable passengers to travel seamlessly throughout the County. Such an arrangement would eliminate separate fares and would be replaced by a simplified fare structure that applies to all routes and services operating as one system. However, there are many complicated and highly sensitive issues associated with this long-term objective while the separate services work toward full consolidation. In the short term, the individual transit services in the County may be able to take incremental steps toward an ultimate goal of one uniform fare structure.

Since Kern County's experience with interagency transferring was not positive, an alternative approach to fare coordination may have a greater chance for success. This could include a monthly pass that features unlimited rides or a more "high tech" approach such as a Smart card.

Monthly Pass

A monthly pass or flash pass is a standard prepaid fare medium used by many small and medium sized transit operators. It is typically good for one calendar month, from the first of the month to the last day of the month and allows the pass holder *unlimited use* while the pass is valid. A regional flash pass could be implemented in two ways. First, a single countywide pass could replace all local passes. A new countywide pass would be valid on all participating services and would facilitate local and regional travel. Since GET and TAT are the only two services that currently offer a monthly pass, this option is not very practical. (The majority of transit services offer tickets rather than monthly passes). Alternatively, a countywide pass could be developed to allow for regional travel. The second option provides passengers the opportunity to purchase just a local pass or tickets if they plan to travel on only one service. Passengers planning to travel regionally would purchase a regional pass, which would be good locally *and* regionally. The regional pass would be priced higher than the two local passes. The major advantage with this approach is that no new equipment would be required to introduce a monthly pass and it appeals to regular riders.

Smart Card

Smart Card is a term used to describe a family of electronic fare payment (EFP) media that offer a range of fare structure options. Smart Cards are typically small; hard plastic cards the size of a credit card that operates as "passive computers." A Smart Card can function as a transfer; deduct an amount per ride, or used as an unlimited use pass, depending on the fare structure of participating services. If a passenger is traveling on a system without passes, the fare is deducted from the card's stored value. If a passenger is traveling on a system with monthly passes, the card reader will determine whether the passenger is paying with a monthly pass or stored value. Both stored value and monthly passes can be accommodated on the same card. The major advantage of this "high tech" approach is that a Smart card can accommodate fare diversity – one service can offer monthly passes and another can offer tickets. A smart card can be used in partnership with employers and schools (student IDs) and provide opportunities for other applications. Smart cards appeal to all types of riders and are valid for long periods of time (i.e. no expiration dates). The major disadvantage of a smart card system is the high start-up costs to purchase new fareboxes and other associated equipment. Since this is an emerging trend in the transit industry, federal funds or public/private partnerships could help defray some of the initial required capital investments.

Chapter 8. Implementation

What is Necessary to Implement Consolidated Service?

Implementing the steps described in this report will require dedication from transit staff and policymakers. A series of meetings, negotiations, and outreach efforts geared to the public and Kern County jurisdictions will enable Kern COG and others overseeing the transit consolidation effort to manage the process and reach a series of milestones.

We talked with a number of individuals at other transit agencies and asked them their advice for successful consolidation. Merced County Transit's General Manager, Larry Shankland, said that successful consolidation requires getting a good mix of local elected officials together and to have staffers who can respond to their needs. The process should be overseen and directed by political leaders who can make the difficult decisions and move the process forward.

According to Merced County Transit, consolidation can work well when the consolidated agency is good at responding to each city's individual needs. This requires working closely with the city managers and responding to changing markets. Through an ongoing cooperative relationship in Merced County, the cities have not experienced a "loss of control" – a commonly stated fear about consolidation.

In Butte County, where administrative consolidation was implemented, some city leaders were reluctant to participate in a fully consolidated system, the lesson is similar. Consolidation advocates concede that they should have worked more closely with influential political leaders throughout the process. An "incremental process" is the advice suggested by Butte County to other communities considering transit consolidation.

Kern COG has had a challenging time getting stakeholders to attend Project Advisory Committee meetings for this Regional Rural Transit Strategy. It has also been difficult to get good attendance at Transit Operators' Group meetings. According to the Mid-Columbia Council of Governments (MCCOG) in Wasco County, OR, stakeholders should be asked what they really need and must be encouraged to come together as part of any coordination process. The MCCOG says talk to every stakeholder up front and ask the simple questions: "What problems are you having?" and "How can we help?" As part of their transit coordination effort, MCCOG took painstaking efforts to ensure that they reached out to every stakeholder group and really listened to their needs.

Lessons from other communities emphasize key factors that are going to be important as Kern County moves toward consolidation:

- A high level of commitment in Kern County by transit staff, city and county staff, and elected officials.

- Building grassroots support through outreach to stakeholders, including transit operators, local jurisdictions, social services, schools, medical facilities, etc.
- Maintaining good information and communication throughout the consolidation process.
- Willingness to negotiate and compromise in accordance with consolidation goals and objectives.
- Meeting all deadlines throughout consolidation process.
- Accurate reporting of costs, funding and performance data by all participating agencies.
- Evaluation of successes and setbacks; willingness to reexamine the most controversial issues and make changes as needed.

Public Support: When to Seek it and How to Use it

One of the issues identified as critical to successful rural transit system consolidation in Kern County is building public support. It is easy to talk about the value of public support, but actually soliciting interest and commitment from the public can be a challenge.

Building public interest is different than building public support. Public interest typically requires an issue to be contentious so that it has enough appeal to solicit the involvement and response of the public. While agreement on consolidation could be a challenge at the policy level in Kern County, it is unlikely to be a contentious or easily understood issue for the general public.

Public support, on the other hand, requires a committed group of highly interested and often influential individuals who can build support in their community. Getting this type of support that is representative of Kern County's diverse communities may not be easy because often the public is too busy to participate, and attend special meetings, or is too geographically dispersed to understand how a comprehensive transit system might affect them. However, if Kern COG can build the political support necessary for consolidation to move forward, then public support should follow.

When would this take place? Political support, and hence public support, is necessary at the early stages of discussion about undertaking consolidation. Once policymakers accept the concepts described in this report, Kern COG should move forward to implement the consolidation process – a process that includes a series of outreach strategies. These may include any number of methods for gathering input, such as conducting community meetings, discussions with transportation advisory groups, public workshops, surveys, planning meetings/games/charrettes, further stakeholder interviews, piggybacking on local community meetings, etc. Kern COG could oversee these efforts, using staff dedicated to the consolidation process or a consultant.

Building public support serves three critical roles in the consolidation process. First, it allows Kern COG to educate the public about the potential benefits of consolidation and verify the assumptions identified in this report. By approaching the various rider and non-rider communities in the county, Kern COG can publicize its desire to enhance the quality, availability and ease of use of the county's transit network.

Second, a comprehensive outreach effort to build public support allows Kern COG to solicit input on consumer needs and priorities for a consolidated rural transit system. By talking with the community, Kern COG can understand the amenities and services transit riders will demand from a consolidated transit system. A series of dialogues and presentations will allow for this level of feedback.

Incorporating concerns, ideas and recommendations from the public is the third way to build public support. It will be important for Kern COG to share the outcomes of the consolidation effort, highlighting the elements of the effort carried forward based on public participation.

Once Kern COG has successfully built a high level of support for a consolidated transit system, maintaining public confidence in the system will be critical to its successful implementation. Will the public be involved in naming the system with a contest open to Kern County residents? Who from the community can best represent the interests of Spanish-speaking riders and advocate for them in the planning process? Can Kern COG illustrate that local partnerships have been cultivated with businesses, social service agencies, schools and day care programs to keep public interest high and public opinion positive?

In addition to providing good service that meets the established service standards, maintaining contact with all of the stakeholders and sharing information with the public will become the consolidated transit system's most important tools for managing positive public perception, and therefore likely political support.

Procedural Steps

The following sections outline the general steps required for building consensus for a consolidated transit system in Kern County. These are intended to provide a guide to move the county's many rural communities and small cities forward toward consolidation. Additional steps are provided for finalizing consolidation plans and initiating a consolidated transit service on the streets of Kern County.

Step 1. Framework: A Consolidation Planning Steering Committee

Time to develop and establish: 1-3 months

As noted in this report, consolidation is a process that requires staff and political leaders at all levels to come together to understand the reasons and expectations of quality transit in

Kern County. We expect the process to require a significant amount of negotiation and compromise by all parties. However, if the persons overseeing the consolidation process can move forward recognizing that the advantages for Kern County's riders and funders outweigh the disadvantages – easier transit use, better availability and information, improved image of transit, potential cost savings – consolidation has a strong chance for success.

We recommend that Kern COG establish an oversight or steering committee representing staff, agencies and policymakers from throughout the county. This Committee would be charged with overseeing the consolidation process, getting buyoff from local jurisdictions and transit operators, and developing a specific strategy for getting consolidation ultimately approved by the Kern COG Board, Kern County Board, and other decision-making boards in the County. Nelson\Nygaard has facilitated similar committees looking at the consolidation process in other counties and has found this to be one of the most effective ways to make decisions and discuss challenging issues.

The Committee should have a chair, as well as staff (could be County or COG staff, or an outside consultant) to facilitate the meetings and to address the variety of technical and informational needs that will arise during the consolidation planning process. Regularly scheduled meetings, note-takers, meeting follow-up procedures – these should all be a part of the Committee's oversight.

The Committee will be responsible for undertaking each of the steps discussed in this report and summarized in the subsequent sections. One of the first tasks the committee should undertake, assuming its ultimate goal is a consolidated rural transit system in Kern County, is to define specific project goals for the outcome of the consolidation planning process. These goals set the stage for a cooperative working relationship among committee members and provide for realistic expectations. For example, goals might include "find an equitable formula for cost sharing" or "develop a consolidated transit system that proactively plans for and responds to the needs of all participating jurisdictions." Of course, these broad study goals should be supported by substantive objectives and a means to eventually evaluate the success of the consolidation planning process. All parties must agree to the goals and objectives before moving forward with the remaining consolidation planning steps.

Step 2. Consolidation Issues

Expected time to address primary planning issues: 6-24 months

Each of the topics raised in this report are interrelated components of an effective consolidated rural transit network. These topics, or issues, can be addressed in any order by the policymakers and staff representatives on the Consolidation Planning Steering Committee. A suggested order is as follows:

Administration

The focus of this topic is selecting the lead agency for a consolidated rural transit system. As presented in Chapter 6, there are two recommended steps that the Consolidation Planning Steering Committee should pursue before making a decision about the administration of a consolidated transit system.

- **Determine which agency or agencies are truly interested and willing to assume this new role.** Based on the level of interest, the options should be narrowed down to one or possibly two agencies. Kern COG, Kern County, and a new agency are identified as the most likely candidates for this responsibility.
- **Refine cost savings projections.** Narrowing down the options for a lead agency will allow further refinement and more accurate projections of annual operating cost savings under a consolidated transit system.

Governance

As described in Chapter 3, determining the appropriate policy board body and composition are closely tied to a decision about a designated lead agency. These administrative decisions are intrinsically linked and will need to be addressed in a coordinated fashion. Steps in the process of identifying the proper governance body are as follows:

- **Based on the selected lead agency, identify appropriate policy bodies.** If it is easy to select a lead agency, it may be obvious who the appropriate governing body should be. After the Committee has narrowed the options to one or two, it should identify a corresponding policy board structure.
- **Evaluate policy board options and structures.** The ultimate decision on a policy board structure should meet the objectives of ensuring equitable representation for the cities and county and should be agreed to by the Committee. The final list of lead agency and policy board options should be presented to current policy board members throughout the County for preliminary review and feedback before further refinement.

Cost Sharing

Cost sharing is discussed in Chapter 7 and examples of short- and long-term cost-sharing arrangements are provided. Short-term steps can be addressed in a committee similar to the Consolidation Planning Steering Committee such as Kern COG's current Transit Operators' Group. For a fully consolidated system, similar steps would need to be undertaken by this Committee:

- **Collect data from local jurisdictions, transit operators, State Department of Finance, etc.** In order to reliably use the funding formula alternatives requires data collection and evaluation. The data needed for some of the formulas is relatively easy to obtain while other formulas involve extensive data collection efforts, which may involve extra costs.

- **“Run” the formulas.** One formula may seem fair and equitable on the surface but when the numbers are applied, the results simply do not “feel right.” After the numbers have been applied to each formula, they should be evaluated against a set of pre-determined criteria, including the initial set of goals identified by the Committee.
- **Develop and apply criteria.** Because selecting an equitable funding formula is more of an art than science, it is important to have a set of both qualitative and quantitative criteria. Some criteria to consider include whether the formula is easy to administer, if it negatively impacts any jurisdiction, if it favors a particular jurisdiction, or if the formula is financially feasible for all jurisdictions (they can actually afford it).
- **Work toward consensus.** Experience in other counties suggests that reaching agreement on a cost sharing arrangement or funding formula is not easily achievable. It requires “working the numbers” until all parties are comfortable with their fair share and believe the formula is equitable for all participants. To achieve consensus will require that the committee be facilitated to keep the process moving in a timely manner.

Service Planning

Chapter 4 provides a series of short-term service guidelines to improve routing, coordination and efficiency as part of a Regional Rural Transit Strategy prior to the development of a consolidated transit system. As Kern County’s transit providers work more closely to coordinate their services, some natural efficiencies will develop. For example, through the adoption of the recommended goals, objectives, and service standards, various transit services in the county can either be justified or modified.

A consolidated service plan could still be developed and implemented without the short-term service changes recommended in Chapter 4. Recommended steps for the Consolidation Planning Steering Committee to undertake are as follows:

- **Adopt goals and service standards.** Although they may have already been adopted by Kern County – the largest provider of rural transit service – the Consolidation Planning Steering Committee should review, modify and adopt a set of service standards for all rural and small city transit services in Kern County.
- **Develop a status quo service strategy.** Using the current services (at the time of the Committee formation) as a baseline, map all rural and small local transit services in Kern County. Identify an operating plan for all services that allows for the seamless sharing of buses, fueling and vehicle storage countywide, etc. For the service plan, it may be appropriate for local fixed routes to be through-routed to intercity services that become local services again in another jurisdiction.
- **Develop a service improvement plan.** A creative operating plan that allows for the provision of service without regard to jurisdictional boundaries is likely to uncover underused vehicles that can be redeployed as other services or that can be used to improve frequencies on existing services. Likewise, the plan’s efficiencies could account for some vehicles to be pulled from service to reduce overall operating costs.

- **Define a service deployment timeline.** Once all parties and the appropriate policy bodies agree to an overall service strategy and timeline, the Committee can direct the current (unconsolidated) transit providers to begin modifying service delivery. This way, transit service in Kern County can be easily transitioned to the eventual rural consolidated transit system.

Marketing

Assuming Kern County's transit providers are successful in implementing the recommended short-term marketing coordination effort outlined in Chapter 5, a framework for marketing the consolidated transit system will have already been established. Most of the marketing-related consolidation issues will surface at the actual time of service implementation (outfitting buses with logos, informational materials, signage, etc.). Nevertheless, the Committee should undertake some preliminary marketing-related tasks as part of the overall consolidation planning framework:

- **Determine a name and working concept for the consolidated rural system.** Working with a new name and image of the consolidated system will help all members of the Committee and various policy boards recognize that this service is indeed something new – something that all current transit providers and their users are assuming a shared role in creating (not something existing that will “gobble them up.”) A new internal name should be identified early in the planning process. Ultimately, the new Policy Board may decide that the public should be involved in deciding a new name or creating a system logo.
- **Develop a public involvement strategy.** While the Committee will undertake a number of high-level policy and planning decisions, public support is valuable. The Committee should identify community meetings to visit and consider some informational resources that explain the “process of planning for consolidation” to the public and other policymakers. This might include a newsletter or a project web site.

Step 3. Service Rollout/Transition of Responsibility

Time to fully implement: 12-24 months

Once acceptance by all of Kern County's critical policy boards is secured on the topics discussed above, and after all agreements are signed and made official, a new policy board will be founded and a new lead agency will be established. Responsibility for the implementation and oversight of the rural consolidated transit services can be transferred to the oversight and administrative structure. This body would assume day-to-day responsibility for the implementation of the consolidated transit system and eventual operation, using a detailed implementation schedule and timeline determined by the previous Consolidation Planning Steering Committee.

A number of issues will need to be undertaken at this point. Following is a list of critical issues for the implementation of a consolidated rural public transportation service in Kern

County. Not knowing all of the issues that will come out of the consolidation planning process, this list cannot be exhaustive. Instead, it provides a broad look at the types of tasks involved in carrying a consolidated service forward, divided into different functional areas. Many of these tasks will need to be conducted concurrently or prior to other tasks in different functional areas (these steps and an approximate schedule for implementation are illustrated in Figure 8-1). The lead agency will need to develop a detailed timeline taking these and other needs into account:

Service Planning

- Review the service assumptions and plans from the planning process and identify vehicle needs.
- Finalize the countywide performance measures and evaluation criteria.
- Finalize routes and services and develop bus schedules.
- Develop any volunteer driver programs or other “alternative” transportation services to be administered as part of the consolidated transit system.
- Obtain environmental clearance (CEQA), if required.

Contracting, Training and Operations

- Solicit bids for any service contractors and select vendors.
- Establish fixed route and dial-a-ride dispatch and scheduling protocols.
- Develop uniform ADA applications, if applicable. Distribute and process applications.
- Develop and conduct driver and dispatcher training program.
- Construct bus stops and shelters, as needed.
- Implement consolidated transit service.

Funding

- Centralize all funding; grant writing and reporting functions under the new administrative lead agency.
- Establish protocols with local jurisdictions based on cost-sharing agreement.

Marketing, Public Information and Customer Service

- Develop and finalize prioritized marketing plan for the consolidated system.
- Design name and logo.
- Establish telephone number and web address.
- Design, produce and distribute bus decals, bus stop signs, information brochures, web site, and other informational tools for the consolidated transit system.
- Plan and staff call center.

Transition of Administrative Responsibility

For most of Kern County's transit providers, different departments handle the day-to-day administrative functions, with one department assuming a lead role. Typical of Kern County's transit operations, Community Services, Finance and Public Works Departments have key roles in administering transit services. Other departments or specialists sometimes have a support role. The number of staff or full time employee equivalents (FTEs) who devote time to transit service functions varies among the transit services, with the majority of staff dividing their time between transit and other city services.

Once a lead agency is determined, consideration should be given to hiring staff with experience operating transit in Kern County. For example, KRT's staff has many years of experience with intercity and local transit service operations. If the County of Kern is identified as the lead agency, but a department other than Roads, KRT staff could be transferred to the new department. Consideration should be given to these and other transit staff if a different agency is selected to administer the consolidated service.

Transferring day-to-day administrative responsibilities from multiple operators to a single lead agency will require a significant amount of coordination. It will be necessary to transfer files and records of local transit data, funding, maintenance, vehicle purchase records, etc. Under consolidation, local jurisdictions that previously provided their own transit service will likely need to provide support and be available to answer questions for the consolidated system's staff for the first year.

Conclusion

Kern COG has initiated the discussion about consolidating transit services in Kern County by undertaking this Regional Rural Transit Strategy. The rest of the process will require a high level of commitment from the many transit providers, city and County staff, political leaders, Kern COG and social service agencies.

This chapter reviews the preliminary steps for the consolidation planning process in Kern County. It also provides an overview of the many tasks and responsibilities that take place once *planning* for consolidation is completed and the focus shifts to *implementing* the consolidated system plan. As outlined in this chapter, the entire process could take as little as 18 months, assuming little controversy, strong political support and an efficient planning and outreach process. Four years should be the longest it would take to implement the consolidated system, assuming nearly two years for the consolidation planning process and another two years to implement the consolidation plan. Sub-regional consolidation or some type of administrative consolidation may be achievable in less time.

Whether it is an accelerated process or a lengthy process, successful consolidation will require regular meetings with a high level of participation and timely follow-up. The process leading to consolidation may be controversial and consolidation advocates will face occasional stumbling blocks. Nevertheless, there is a strong opportunity for consensus in

Kern County on this issue. Even some of the most reluctant transit operators have expressed a willingness to investigate new ways to operate and manage transit services, particularly if they are accompanied by cost savings or a reduction in work load.

It will be important to build on the momentum that develops during the consolidation planning process so Kern County does not miss the opportunity to gain support, move forward, and implement a comprehensive countywide rural transit network.

Appendix: Recommended Service Performance Standards

Service performance standards are broken out into efficiency and service quality categories.

Efficiency Standards

Recommended efficiency performance measures for Kern County's transit services include the following:

- **Operating Cost per Passenger** – Calculated by dividing all operating and administrative costs by total passengers (with passengers defined as unlinked trips). The subsidy cost per passenger is a further refinement of this measure and is calculated by subtracting farebox revenue from gross operating and administrative costs, and dividing by total passengers.
- **Operating Cost per Revenue Hour** – Calculated by dividing all operating and administrative costs by the total number of vehicle revenue hours (with revenue hours defined as time when the vehicle is actually in passenger service). Operating cost per revenue hour measures system efficiency.
- **Passengers per Revenue Hour** – Calculated by dividing the total number of passengers (unlinked trips) by the total number of vehicle revenue hours. The number of passengers per hour is a good measure of service productivity and critical to the establishment of design standards and benchmarks for the expansion of transit service.
- **Farebox Recovery Ratio** – Farebox recovery ratio is calculated by dividing all farebox revenue by total operating and administrative costs. The California Transportation Development Act mandates a farebox recovery of 10% for fixed route service in rural or small urban centers, and dial-a-ride services. Farebox recovery evaluates both system efficiency (through operating costs) and productivity (through boardings). Farebox recovery ratio benchmarks are critical to the establishment of passengers per revenue hour benchmarks, as well as benchmarks for design standards. Service design and productivity must support the 10% (non-urban) and 20% (urban) minimum TDA farebox recovery ratios.

Efficiency Standards Tools for Kern County

The recommended indicators comply with the basic performance indicators required by TDA and are consistent with operating and cost data already collected for each of Kern County's transit services. Each of the performance measure categories is quantified for Kern County's transit systems in Report 1: Existing Conditions.

Cost and productivity standards based on revenue miles were not included in the set of recommended performance standards because most transit costs – as well as budget projections – are based on operating or revenue hours. Revenue mile-based performance standards would be more relevant than hour-based standards for paratransit contracts, such as taxis contracts, where contractor compensation is based on travel distance.

Realistic performance benchmarks will vary by service category. Figure A-1 provides a summary discussion of service efficiency standards for intercity routes, community fixed route services and dial-a-ride services.

Figure A-1 Kern County Transit Performance Standards

Performance Standard	Summary Comments/Benchmark Standards
<p>Operating Cost/Passenger</p>	<p>Based on annual operating costs and productivity. Will vary from year to year depending on agency administration overheads, in-house or contractor operating costs and/or bid prices, and achievable productivity. As operating costs increase, the operating cost/passenger can be controlled or actually lowered by improving overall service productivity.</p> <p>Target intercity category-wide benchmark (average) = \$6.80</p> <p>Target community fixed route category-wide benchmark (average) = \$5.25</p> <p>Target dial-a-ride category-wide benchmark (average) = \$8.50</p> <p>The annual operating cost/passenger should not increase above the approved rate of inflation.</p> <p>If the category average goes below the benchmark, poorly performing routes or services should be considered for improvement, an alternative delivery option, or elimination.</p>
<p>Operating Cost/Revenue Hour</p>	<p>Based on annual in-house operating costs or contractor bid prices and administration costs.</p> <p>With fuel and insurance cost increases, this is becoming a harder performance standard to set a benchmark for. Many of the variables are beyond the control of the agency.</p> <p>Target intercity category-wide benchmark (average) = \$49.00</p> <p>Target community fixed route category-wide benchmark (average) = \$49.00</p> <p>Target dial-a-ride category-wide benchmark (average) = \$49.00</p> <p>Ideally, the annual operating cost/passenger should not increase above the approved rate of inflation.</p> <p>If the operating cost/revenue hour for a specific service goes above the category benchmark, lower cost service alternatives should be considered.</p>

Performance Standard	Summary Comments/Benchmark Standards
<p>Passengers/ Revenue Hour</p>	<p>Target intercity category-wide benchmark (average) = 9.50 passengers/revenue hour</p> <p>Target community fixed route category-wide benchmark (average) = 15.00 passengers/revenue hour</p> <p>Target dial-a-ride category-wide benchmark (average) = 5.00 passengers/revenue hour</p> <p>If the category average goes below the benchmark, poorly performing routes or services should be considered for improvement, an alternative, potentially more productive delivery option, or elimination.</p>
<p>Farebox Recovery Ratio</p>	<p>Farebox recovery ratios are established through the TDA. The farebox recovery ratio can be achieved as operating costs increase without significant fare increases through improvements in productivity.</p> <p>Target intercity category-wide benchmark (average) = 10.00%</p> <p>Target community fixed route category-wide benchmark (average) = 10.00%</p> <p>Target dial-a-ride category-wide benchmark (average) = 10.00%</p> <p>If the category average goes below the benchmark, poorly performing routes or services should be considered for improvement, fare increases, an alternative delivery option, or elimination. No individual, poorly performing service should bring the overall service category average below the 10% benchmark. TDA compliance could be at risk.</p>

Service Reliability Standards

Service quality and reliability standards for all Kern County transit services should reflect the adopted service goal and support the measurement of success in achieving specific objectives and policies. Figure A-2 summarizes the key service quality and reliability standards, and provides numeric values proposed for all service categories in Kern County.

Figure A-2 Summary of Recommended Service Quality and Reliability Standards

Quality/ Reliability Standard	Intercity/Community Fixed Route	Local Dial-a-Ride Service
On Time Performance	<p>90% of all revenue bus trips must depart the route start point and arrive at the route end point within five minutes of the time published in the schedule.</p> <p>No bus shall depart a formal time point before the time published in the schedule.</p>	<p>90% of all pick ups must be within the policy pick up window, and 90% of all drop offs will not be earlier than 20 minutes before, or five minutes after the requested drop off time, unless amended by the passenger.</p>
Passenger Complaints/ Passengers Carried	<p>The number of complaints shall not exceed 0.10% of the total boardings.</p> <p><i>Benchmark = 1 complaint/1,000 boardings.</i></p>	<p>The number of complaints shall not exceed 0.30% of total passengers carried.</p> <p><i>Benchmark = 3 complaints/1,000 passengers carried.</i></p>
Preventable Accidents/ Revenue Mile Operated	<p>While there should be no preventable accidents, a benchmark has been established to permit some flexibility in the evaluation of training efforts.</p> <p>The number of preventable accidents shall not exceed 0.0005% of total revenue miles operated.</p> <p><i>Benchmark = 1 preventable accident/200,000 revenue miles.</i></p>	<p>While there should be no preventable accidents, a benchmark has been established to permit some flexibility in the evaluation of training efforts.</p> <p>The number of preventable accidents shall not exceed 0.0005% of total revenue miles operated.</p> <p><i>Benchmark = 1 preventable accident/200,000 revenue miles.</i></p>
Roadcalls/ Revenue Mile Operated	<p>The number of roadcalls should not exceed 0.01% of total revenue miles operated.</p> <p><i>Benchmark = 1 roadcall/10,000 revenue miles.</i></p>	<p>The number of roadcalls should not exceed 0.01% of total revenue miles operated.</p> <p><i>Benchmark = 1 roadcall/10,000 revenue miles.</i></p>
Bus Trips Cancelled	<p>No scheduled bus trips shall be cancelled.</p> <p><i>Benchmark = zero tolerance.</i></p>	<p>No scheduled passenger trips shall be cancelled because of insufficient vehicles to meet the scheduled in-service pullout requirement.</p> <p><i>Benchmark = zero tolerance.</i></p>
ADA Trip Denials	<p>N/A</p>	<p>No advance bookings by ADA certified registrants should be denied.</p> <p><i>Benchmark = zero tolerance.</i></p>

Ultimately, the performance standards provide the tools for determining how effectively and efficiently services are being delivered. They allow both transit administrators and decision-makers in Kern County to develop thresholds for implementing services, as well as service thresholds that may suggest the need to discontinue under performing services.

Recommended Service Design Standards

Service design standards are critical planning tools to justify and prioritize the expansion of service to new areas and potential markets, and to guide how the service will be delivered. Transit service design incorporates a mix of interrelated social, political and economic factors. Generally these can include:

- The community's vision, goals, and objectives for transit
- The marketability of the service(s) to be provided
- Environmental and energy issues
- Available technology
- Budget limitations
- Land use constraints and right-of-way design characteristics and limitations

Intercity and community fixed route design service standards are summarized in Figure A-3. Figure A-4 summarizes dial-a-ride design service standards for Kern County's services.

Figure A-3 Kern County Intercity and Community Fixed Route Service Design Standards

Standard	Benchmark/Criteria
<p>Introduction of New Service</p>	<p>This can include the introduction of a new route, the expansion of an existing route, and an increase in service frequency.</p> <p>New intercity service should not be introduced if anticipated hourly productivity will not meet the minimum productivity standard of 9.50 passengers per revenue hour (see Figure 2-2).</p> <p>New community fixed route service should not be introduced if anticipated hourly productivity will not meet the minimum productivity standard of 15.00 passengers/revenue hour (see Figure 2-2).</p> <p>New service should be operated on a trial basis for up to 12 months to allow ridership to develop.</p>
<p>Maximum Walking Distance</p>	<p>Intercity Routes 70% of all Kern County residences or activity centers along a service corridor will be within a one-mile walking distance from a bus stop.</p> <p>Community Fixed Routes 70% of all service area residences or activity centers will be within 1/4-mile walking distance of a bus stop.</p>
<p>Bus Stop Spacing</p>	<p>Intercity Routes Bus stops will be strategically located at key activity centers or transit transfer centers in each of the communities served.</p> <p>Community Fixed Routes Bus stops will be spaced at a minimum of 1,200 feet along each route within an urban area.</p>
<p>Bus Stop Location</p>	<p>Intercity Routes Bus stops will be placed at locations where buses can safely pull in and out of the traffic flow and at locations where passengers can safely gather and wait for the bus.</p> <p>Community Fixed Routes Bus stops should be placed at the far side corner of intersections to allow clearer traffic view lines for pedestrians.</p> <p>Mid-block bus stops should be limited to major activity centers or high-density residential complexes.</p>

Standard	Benchmark/Criteria
<p>Minimum Bus Stop Design</p>	<p>All bus stops should be clearly marked with proper signage including the designated route number.</p> <p>Benches and shelters should be considered for individual stops where the average daily boardings exceed 15 passengers or at stops frequently used by seniors and persons with disabilities.</p>
<p>Passenger Loads</p>	<p>Intercity Routes Maximum passenger loads should not exceed 1.00 passengers/seat on buses assigned to intercity routes.</p> <p>Community Fixed Routes Maximum passenger loads should not exceed 1.25 passengers/seat on buses assigned to community fixed routes.</p>
<p>Service Headways</p>	<p>Service headways should be such that passenger load standards are not exceeded on a continual basis.</p>
<p>Timed Transfers</p>	<p>Intercity Routes Schedules should support good connections with GET, AVTA, TCT, Santa Clarita Transit, Inyo-Mono Transit and Metrolink services.</p> <p>Community Fixed Routes Schedules should support good connections with intercity routes.</p> <p>General Scheduling Guidelines Where feasible, intercity and community fixed route schedules should be designed to arrive at major employment centers and schools before shift or class start times, with sufficient time for passengers to walk in, and depart major employment centers and schools after shift or dismissal times. Scheduled departure times should consider the time necessary to get to a bus stop and to minimize wait times.</p>
<p>Minimum Bus Specifications</p>	<p>While all buses should meet all federal, state and city safety, emissions, accessibility and mechanical fitness requirements, all buses should have sufficient capacity to meet passenger load standards for intercity or community fixed route services, conform to Kern County's alternative fuel policy and meet full service day fuel capacity requirements.</p>
<p>Minimum Service Coverage Hours</p>	<p>If dial-a-ride service is not available at the required times, local community fixed route services should operate as a feeder for all intercity trips.</p>

Figure A-4 Dial-a-Ride Service Design Standards

Standard	Benchmark/Criteria
Service Eligibility	<p>In communities where no fixed route service is provided, dial-a-ride should be open to the general public.</p> <p>In communities where fixed route service is available, dial-a-ride eligibility should be restricted to seniors or persons with disabilities.</p>
Service Capacity	<p>Service capacity, as determined by the number of in-service vehicles, will be maintained at levels that support the minimum hourly productivity standard of 5.00 passengers/revenue hour (see Figure 2-2).</p>
Pick Up Windows	<p>The pick up windows confirmed with dial-a-ride passengers will not exceed 30 minutes, allowing 15 minutes before and after the confirmed time.</p>
Drop off Window	<p>Unless otherwise advised by the passenger, no passenger will be dropped off 20 minutes before or after the confirmed drop off time.</p>
Maximum On Board Travel Time	<p>Onboard travel times for dial-a-ride passengers will not exceed 40 minutes.</p>
Trip Booking Options	<p>Registered seniors and persons with disabilities shall be able to make subscription, advance and same-day bookings.</p> <p>General public riders, including youth, shall be limited to same day bookings.</p>
Minimum Vehicle Specifications	<p>While meeting all federal, state and city safety, emissions and mechanical fitness requirements, all dial-a-ride vehicles will have a minimum capacity for three ambulatory passengers, or capacity for one wheelchair and one ambulatory passenger. This standard recognizes the potential advantage of operating accessible mini-vans, where expected passenger volumes are low.</p>
Minimum Service Coverage Hours	<p>If local community fixed route service is not available at the required times, dial-a-ride service should operate as a feeder for all KRT intercity trips.</p>