Dixie MPO Regional Transit Study

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Prepared for
Dixie Metropolitan Planning Organization
# TABLE OF CONTENTS

**Executive Summary** .................................................................................................................................................. iv

1.0 **Introduction and Background** ......................................................................................................................... 1

2.0 **Case Study Summary** ....................................................................................................................................... 1

  2.1 Introduction of Case Studies .................................................................................................................................. 1

  2.2 Case Study Operational Statistics ......................................................................................................................... 3

  2.3 Case Study Funding Sources .................................................................................................................................. 4

  2.4 General Observations from the Case Studies ....................................................................................................... 4

3.0 **Transit Agency Creation and Governance – Options and Processes** ................................................................. 5

  3.1 Dixie Region Framework for Assessing Governance .......................................................................................... 5

  3.2 Governance Options ............................................................................................................................................... 7

    3.2.1 City Department with Interlocal Agreements ................................................................................................. 7

    3.2.2 County Department .......................................................................................................................................... 8

    3.2.3 Interlocal Entity ................................................................................................................................................ 9

    3.2.4 Public Transit District ....................................................................................................................................... 10

  3.3 Next Steps ................................................................................................................................................................ 10

4.0 **Options for Transit Funding** .............................................................................................................................. 11

  4.1 Local Dedicated Taxation Options .......................................................................................................................... 12

    4.1.1 Description of Public Transit Sales and Use Tax Options .............................................................................. 13

    4.1.2 Analysis of Potential New Sales Tax Revenue (Dedicated Transit Tax) ...................................................... 15

  4.2 Alternative Local Funding Mechanisms .................................................................................................................. 16

    4.2.1 Appropriation of Highway Taxes ..................................................................................................................... 16

    4.2.2 Class B & C Road Funds .................................................................................................................................. 17

    4.2.3 General Sales and Use Tax Appropriation ....................................................................................................... 17

    4.2.4 Tourism Taxes .................................................................................................................................................. 18

  4.3 Supplemental Local Funding Mechanisms ........................................................................................................... 20

    4.3.1 College and University Contracts ................................................................................................................ 20

    4.3.2 Sponsorships ..................................................................................................................................................... 20

  4.4 State and Federal Funding & Leverage Mechanisms ............................................................................................. 21

    4.4.1 CIB Low Interest Loans ............................................................................................................................... 21

    4.4.2 Transit Oriented Grant Opportunities ............................................................................................................ 21

    4.4.3 Urbanized Area Formula Program (5307) .................................................................................................... 24

    4.4.4 Major Capital Investments (New Starts & Small Starts)(5309) ................................................................. 24

    4.4.5 TIGER (USDOT) Grants ................................................................................................................................ 24

    4.4.6 Formula Grants for Other than Urbanized Areas (5311) .......................................................................... 25

    4.4.7 Medicaid Funding Options .......................................................................................................................... 25

  4.5 Alternative Financing Options for Capital Expenditures ....................................................................................... 26

    4.5.1 Creation of Interlocal Agency ...................................................................................................................... 26

    4.5.2 Tax Increment Financing (TIF) ..................................................................................................................... 26

    4.5.3 Special Assessment Areas ................................................................................................................................ 27

  4.6 Most Promising Funding Sources ......................................................................................................................... 27

    4.6.1 Short-Term Funding Strategy ...................................................................................................................... 27

    4.6.2 Long-Term Funding Strategy ...................................................................................................................... 28

5.0 **Strategies for Developing and Gauging Public Support** ...................................................................................... 28
## Table of Contents

5.1 Stakeholder Outreach ................................................................. 29
5.2 Agency Website and Social Media .................................................. 30
5.3 Speaker’s Bureaus ................................................................. 30
5.4 Formal Opinion Polling ............................................................. 31
5.5 Public Open Houses and Workshops ............................................. 32
5.6 iTownHall ................................................................................. 33
5.7 Application of Strategies for Developing and Gauging Public Support ..................................................... 33

6.0 Conclusions, Recommendations and Potential Next Steps ............................. 34

6.1 Concept Route Illustration .......................................................... 36
6.1.1 Concept Service Descriptions and Cost Estimates ......................... 36
6.1.2 Funding Illustration ............................................................ 37

## APPENDIX

Appendix A  Case Studies ................................................................. A-1
Appendix B  Local Mass Transit & Additional Mass Transit Alternatives .................. B-1
Appendix C  Class B & C Road Fund Alternatives ........................................ C-1
Appendix D  General Sales and Use Tax Revenue Alternatives ............................ D-1
Appendix E  Grants .............................................................................. E-1
Appendix F  Sample Survey Questions ................................................... F-1
Appendix G  Concept Route Assumptions ............................................... G-1
Appendix H  References ........................................................................ H-1
LIST OF FIGURES

Figure 2–1: Case Study Locations ................................................................................................................ 2
Figure 3–1: Alignment Principle .................................................................................................................... 7
Figure 5–1: Timeline for Public Support Strategies .................................................................................... 34
Figure 6–1: Transit Phasing Strategy ......................................................................................................... 35
Figure 6–2: Summary of Concept Route Funding ...................................................................................... 40

LIST OF TABLES

Table 2–1: Case Study Transit Organizations .............................................................................................. 2
Table 2–2: Case Study Operational Statistics .............................................................................................. 3
Table 2–3: Case Study Funding Sources ..................................................................................................... 4
Table 4–1: Summary of Funding Approaches – Case Study Entities ......................................................... 11
Table 4–2: Summary of Sales and Use Tax Option to Fund Public Transit ............................................... 12
Table 4–3: Illustration of Single Year Revenues from Local Transit Tax Options (§59-12-2213 and §59-12-2214) ...................................................................................................................................................... 15
Table 4–4: Comparison of Actual Revenues from 0.30% Highway Tax & Potential Contribution .............. 16
Table 4–5: Summary of Class B & C Road Funds ..................................................................................... 17
Table 4–6: Illustration of Sales Tax Revenues by Community ................................................................. 18
Table 4–7: Formula Grant Programs .......................................................................................................... 22
Table 4–8: Discretionary Grant Programs .................................................................................................. 23
Table 4–9: Debt Financing .......................................................................................................................... 26
Table 6–1: Fixed Route Cost Estimate ....................................................................................................... 37
Table 6–2: Commuter Route Cost Estimate ............................................................................................... 37
Table 6–3: Concept Funding for Fixed Route to Santa Clara and Ivins (Year 1) ....................................... 38
Table 6–4: Concept Funding for Fixed Route to Santa Clara and Ivins (Years 2-6) ................................. 38
Table 6–5: Concept Funding for Fixed Route to Washington (Years 1)................................................... 39
Table 6–6: Concept Funding for Fixed Route to Washington (Years 2-6).................................................. 40
EXECUTIVE SUMMARY

Public transportation in the Dixie region is currently provided by SunTran which operates as a division of the City of St. George Public Works Department. The existing transit service is limited to the boundaries of the City of St. George. However, recent studies in the Dixie region have indicated a demand for transit services to extend beyond the St. George municipal boundaries. The expansion of transit service beyond the existing service area will require additional funding. Existing federal formula funding is available and may go unused unless additional local match funding can be generated. Additional local funding could be contributed by outlying jurisdictions – such as Ivins, Santa Clara and Washington – as transit is extended into their respective communities. However, with SunTran’s existing governance these jurisdictions would have limited decision-making power over the level of transit service in their communities. Therefore, many officials and stakeholders have expressed interest in the consideration of a new governance and funding structure for operating regional public transportation.

The purpose of this study was to evaluate the governance and funding options available to the Dixie region as it seeks to expand and diversify transit service. The identification of strategies for developing, gauging and maintaining public support was also an important part of this study. A total of six case studies were evaluated to gain insight for this report and to aid local decision makers in deciding the future of transit service in the Dixie region by demonstrating how comparable areas have addressed similar issues.

In coordination with the Dixie Metropolitan Planning Organization (Dixie MPO) and project stakeholders from SunTran, St. George, Ivins and Washington City, six transit organizations were selected to be reviewed as case studies. These case studies were selected largely based on the size of the communities they serve, but were also selected to illustrate the variety of governance and funding options that can be used to expand and diversify a transit system. The case studies provided valuable insights into how a small transit system – such as SunTran – can evolve into a regional transit system.

The governance and institutional structure of a transit agency are critical to the long-term stability of transit service and the ability to maintain and improve this service over time. Four common governance strategies were evaluated for applicability to the Dixie region and the existing SunTran system. When formulating changes to governance it is important to acknowledge that governance and funding changes should be pursued simultaneously. Considering these options, it appears that a phased approach to governance changes would be most appropriate for transit in the Dixie region.

Funding is an important aspect of a successful transit system and will ultimately control the potential for regionalization of a transit system. Several funding options were evaluated in this study to illustrate the options available in the St. George area. It was determined that dedicated transit funding offers the most sustainable and promising funding mechanism for a regional transit system. Utah has several dedicated taxing options that can be pursued to fund a regional transit service. However, the pursuit of dedicated funding should be coordinated with the establishment of an independent public transit district.

Public support will be a key component in the creation of a successful regional transit network. Six public support strategies were identified in this study for developing, gauging and maintaining public support as the existing transit system is transitioned to a regional transit network. It is recommended that the public support process begin now through outreach to potential stakeholders. As the existing system transitions to a regional system the public support strategies identified in this study as well as other applicable strategies should be implemented. After the transition is complete public support should be maintained by continuing the public support process.
The evaluation of the case studies and detailed review of governance and funding options resulted in the formulation of short- and long-term recommendations for the future of public transportation in the Dixie region. Initially it is recommended that SunTran retain operation of transit service and expand service through interlocal agreements. The purpose of these agreements would be to expand transit service while leveraging sufficient local funds to match the existing federal funds. In the short-term additional local funding for transit can be obtained through a combination of an appropriation of the existing Highway Tax, Class B & C Road Funds and/or a portion of General Sales Tax Revenues. The success of the initial transit service expansion would provide the foundation for the public education and outreach campaign necessary for the eventual creation of a public transit district coupled with the implementation of a dedicated transit tax.
1.0 INTRODUCTION AND BACKGROUND

Public transportation in the Dixie region is provided by the Public Works Department of the City of St. George under the operating name SunTran. As a unit of the municipal government, decisions regarding SunTran operations and funding are the responsibility of the St. George City Council. SunTran has elected to provide transit services directly, using municipal employees rather than using other options such as a third-party contractor. SunTran currently offers fixed route and demand response services only within the limits of the City of St. George.

Recent regional studies have indicated a demand for expanded public transportation services that extend outside of the St. George municipal boundaries. However, given the City’s constrained funding sources and extensive needs (including police, fire, water and other critical public services), the City is unable to simply expand transit service to outlying jurisdictions without first identifying additional funding. In fact, the City is currently not fully utilizing federal formula funding because it is unable to provide the required local funding match. The outlying jurisdictions and municipalities could contribute additional local funding to match federal funds and expand transit to their respective areas. However, Suntran’s current governance structure does not facilitate shared decision making regarding transit among multiple jurisdictions. If other jurisdictions provided funding for transit they would likely prefer to have decision-making power over the level of transit service their communities receive.

Therefore, in order to pursue the long-term goal of expanded regional public transportation, many officials and stakeholders have recommended that new governance and funding structures be considered for transit in the region. This report explores governance and funding options that could be employed within Dixie region as well as strategies for developing and measuring public support as regionalized transit is pursued. A series of case studies were reviewed to demonstrate what has been done in similar areas as transit service in these areas has become more regionalized.

2.0 CASE STUDY SUMMARY

A total of six transit organizations were identified in coordination with the Dixie Metropolitan Planning Organization (Dixie MPO) and project stakeholders from SunTran, St. George, Ivins and Washington City to be reviewed as case studies for this study. The purpose of these case studies is to aid local decision makers in deciding the future of transit service in St. George and the surrounding areas by demonstrating how comparable areas have addressed similar issues. The case studies were selected largely based on the size of the communities they serve, but were also selected to illustrate the variety of governance and funding options that can be used to expand and diversify a transit system.

Detailed case studies for each of the six transit organizations are included in Appendix A.

2.1 Introduction of Case Studies

A general description of the case studies evaluated for this study is presented in Table 2–1. Information for St. George and SunTran is also provided for comparison. The locations of the case studies are illustrated in Figure 2–1.
Table 2–1: Case Study Transit Organizations

<table>
<thead>
<tr>
<th>Location</th>
<th>Transit System</th>
<th>Service Logo</th>
<th>Date Formed</th>
<th>Urbanized Area</th>
<th>Urbanized Area Population</th>
<th>Population Growth 2000-2010a</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pocatello, ID</td>
<td>Pocatello Regional Transit</td>
<td>PRT</td>
<td>1970</td>
<td>Pocatello/Chubbuck</td>
<td>62,498</td>
<td>13.2%</td>
</tr>
<tr>
<td>Missoula, MT</td>
<td>Missoula Urban Transportation District</td>
<td>Mountain Line</td>
<td>1977</td>
<td>Missoula</td>
<td>69,491</td>
<td>17.1%</td>
</tr>
<tr>
<td>Fort Collins, CO</td>
<td>Transfort</td>
<td>Transfort</td>
<td>1974</td>
<td>Fort Collins</td>
<td>206,757</td>
<td>21.4%</td>
</tr>
<tr>
<td>Logan, UT</td>
<td>Cache Valley Transit District</td>
<td>CVTD (as LTD)</td>
<td>1990</td>
<td>Logan</td>
<td>76,187</td>
<td>12.9%</td>
</tr>
<tr>
<td>Merced, CA</td>
<td>Merced County Transit</td>
<td>The Bus</td>
<td>1996</td>
<td>Merced</td>
<td>110,483</td>
<td>21.5%</td>
</tr>
<tr>
<td>Flagstaff, AZ</td>
<td>Northern Arizona Intergovernmental Public Transit Authority</td>
<td>NAIPTA</td>
<td>2006</td>
<td>Flagstaff</td>
<td>57,050</td>
<td>24.5%</td>
</tr>
</tbody>
</table>

For Comparison

| St. George, UT | SunTran       | SunTran | 2003 | St. George | 62,630 | 46.8% |

a. Growth of urbanized area from 2010 US Census
b. Growth of county as a whole

Figure 2–1: Case Study Locations
Some information for the case studies was obtained from an FTA maintained website called the National Transit Database (NTD). This website provides information from all transit agencies that receive federal funds. Phone interviews were conducted with each of the case study transit organizations to gain a deeper understanding of the individual transit systems. Specifically, transit operators were asked to provide information about public support, organizational governance and funding in addition to generally describing their system and its history. Contact information for these transit operators is included with the case studies in Appendix A. The sections that follow summarize and compare the findings of the case studies and their relevance to the future of transit service in the Dixie region.

### 2.2 Case Study Operational Statistics

A large percentage of the transit systems evaluated for this study have taken a wide variety of approaches to meet the needs of the communities they serve. Some systems focus service within the urbanized area; others are truly regional systems; but all have at least some regional aspect. Table 2–2 summarizes the operational characteristics of the case studies. Once again information for SunTran is presented for comparison.

#### Table 2–2: Case Study Operational Statistics

<table>
<thead>
<tr>
<th>Service Logo</th>
<th>Service Area Pop.</th>
<th>Pop. Density (Pop./Sq. Mi.)</th>
<th>Sq. Miles</th>
<th>2010 Operating Budget</th>
<th>Vehicles in Max. Service</th>
<th>No. Fixed Routes</th>
<th>Annual Vehicle Service Hours</th>
<th>Annual Vehicle Service Miles</th>
<th>Annual Riders</th>
<th>Annual VSH(^a) per Capita</th>
<th>Annual Riders per Capita</th>
</tr>
</thead>
<tbody>
<tr>
<td>PRT</td>
<td>61,666</td>
<td>2,284</td>
<td>27</td>
<td>$2.5 Million</td>
<td>29</td>
<td>10</td>
<td>53,792</td>
<td>792,097</td>
<td>555,550</td>
<td>0.87</td>
<td>9.01</td>
</tr>
<tr>
<td>Mountain Line</td>
<td>69,999</td>
<td>1,000</td>
<td>70</td>
<td>$3.8 Million</td>
<td>27</td>
<td>12</td>
<td>53,325</td>
<td>729,171</td>
<td>812,955</td>
<td>0.76</td>
<td>11.61</td>
</tr>
<tr>
<td>Transfort</td>
<td>118,652</td>
<td>2,525</td>
<td>47</td>
<td>$8.0 Million</td>
<td>49</td>
<td>19</td>
<td>101,523</td>
<td>1,159,068</td>
<td>2,074,580</td>
<td>0.86</td>
<td>17.48</td>
</tr>
<tr>
<td>CVTD</td>
<td>80,000</td>
<td>2,424</td>
<td>33</td>
<td>$4.2 Million</td>
<td>21</td>
<td>13</td>
<td>62,464</td>
<td>921,571</td>
<td>1,925,316</td>
<td>0.78</td>
<td>24.07</td>
</tr>
<tr>
<td>The Bus</td>
<td>120,000</td>
<td>4,000</td>
<td>30</td>
<td>$9.8 Million</td>
<td>42</td>
<td>21</td>
<td>114,218</td>
<td>1,905,171</td>
<td>973,066</td>
<td>0.95</td>
<td>8.11</td>
</tr>
<tr>
<td>NAIPTA</td>
<td>86,332</td>
<td>1,328</td>
<td>65</td>
<td>$4.9 Million</td>
<td>19</td>
<td>15</td>
<td>55,649</td>
<td>738,937</td>
<td>1,142,548</td>
<td>0.64</td>
<td>13.23</td>
</tr>
</tbody>
</table>

For Comparison

| SunTran       | 62,630            | 1,898                       | 33        | $0.9 Million          | 6                        | 4                   | 24,700                     | 275,735                   | 342,154        | 0.39                        | 5.46                      |

\(a\) VSH = Vehicle Service Hours

As shown in Table 2–2 each of the case studies varies in the amount of service it provides. All the case study transit systems provide a higher level of service than SunTran in terms of both vehicle service hours and annual riders per capita. However, increased level of service requires a larger operating budget. In some cases the operating budget of these case study systems is more than ten times the 2010 operating...
budget of SunTran. Having funding sources in place is essential to the successful expansion and regionalization of a transit system.

### 2.3 Case Study Funding Sources

The transit systems evaluated for the case studies have found a variety of creative ways to address funding needs of their systems. Table 2–3 summarizes how the case study systems fund their operations and capital expenses. Data for SunTran is again presented for comparison.

**Table 2–3: Case Study Funding Sources**

<table>
<thead>
<tr>
<th>Service Logo</th>
<th>Federal Transit Funds Used</th>
<th>5307 Funds</th>
<th>Other FTA</th>
<th>State Transit Funds</th>
<th>Local - Dedicated Funds</th>
<th>Local - Discretionary Funds</th>
<th>Fare Revenues</th>
<th>Other Funds</th>
</tr>
</thead>
<tbody>
<tr>
<td>PRT</td>
<td>$3,390,000</td>
<td>$1,590,000</td>
<td>$1,800,000</td>
<td>$60,000</td>
<td>$0</td>
<td>$470,000</td>
<td>$130,000</td>
<td>$580,000</td>
</tr>
<tr>
<td>Mountain Line</td>
<td>$1,860,000</td>
<td>$1,560,000</td>
<td>$300,000</td>
<td>$40,000</td>
<td>$1,520,000</td>
<td>$0</td>
<td>$570,000</td>
<td>$90,000</td>
</tr>
<tr>
<td>Transfort</td>
<td>$2,720,000</td>
<td>$690,000</td>
<td>$2,030,000</td>
<td>$0</td>
<td>$0</td>
<td>$5,880,000</td>
<td>$1,070,000</td>
<td>$300,000</td>
</tr>
<tr>
<td>CVTD</td>
<td>$6,500,000</td>
<td>$3,840,000</td>
<td>$2,660,000</td>
<td>$0</td>
<td>$3,170,000</td>
<td>$0</td>
<td>$0</td>
<td>$100,000</td>
</tr>
<tr>
<td>The Bus</td>
<td>$4,140,000</td>
<td>$3,570,000</td>
<td>$570,000</td>
<td>$5,270,000</td>
<td>$0</td>
<td>$0</td>
<td>$1,440,000</td>
<td>$90,000</td>
</tr>
<tr>
<td>NAIPTA</td>
<td>$2,330,000</td>
<td>$1,290,000</td>
<td>$1,040,000</td>
<td>$20,000</td>
<td>$3,280,000</td>
<td>$0</td>
<td>$840,000</td>
<td>$20,000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>For Comparison</th>
</tr>
</thead>
<tbody>
<tr>
<td>SunTran</td>
</tr>
</tbody>
</table>

a. Local - Dedicated Funds
- Missoula - Property Tax (Public Vote in 1977)
- Cache Valley - 0.3% Sales Tax (Public Vote in 2001)
- Flagstaff - 0.29% Sales Tax (Public Vote in 2010)

b. Local - Discretionary Funds
- Pocatello - City General Funds
- Transfort - City uses 0.85% Sales Tax for Transit
- NAIPTA - City General Funds from Cottonwood and Sedona are included in the dedicated fund column

As shown in Table 2–3, all the case study transit systems have been able to fully leverage their 5307 funds and have done so through various local, state and other sources. These transit systems have also been able to leverage additional federal funds. Detailed breakdowns of funding sources and their uses can be found in the case studies located in Appendix A.

### 2.4 General Observations from the Case Studies

The case studies evaluated for this study provided some valuable insights into how a small transit system can evolve into a regional transit network. Some general observations extracted from the case studies are as follows:

- All systems started as small municipal systems, most more than 25 years ago and have evolved over time into larger regional systems.
• SunTran has a shorter history, but its budget and level of transit service would need to approximately double (on a per capita basis) to be equivalent.

• These systems have used a variety of approaches for service expansion and governance, but they all seem satisfied with the approach for their respective area.
  - Some are municipal systems with interlocal agreements (i.e. Pocatello, Fort Collins)
  - The others are special districts or authorities

• The expansion of these systems was frequently tied to new transit funding or availability of specific, dedicated transit funding; some new funding measures are recent (e.g. Cache Valley, Flagstaff)

• Purchase of service arrangements, through interlocal agreements, are commonly used, sometimes as a stepping stone to a transit district

• All FTA 5307 funds are used and usually supplemented by other FTA sources (e.g. New Freedom, JARC, rural); a variety of matching strategies are used (e.g. University agreements, Medicaid funds)

• Cache Valley may be the best model for the St George region since it is comparable in size, was established through Utah legislation and has effectively increased transit service and performance

3.0 TRANSIT AGENCY CREATION AND GOVERNANCE – OPTIONS AND PROCESSES

Public transportation in the Dixie region is provided by SunTran, which operates as a branch of the Public Works Department of the City of St. George. As a branch of the city government, decisions regarding SunTran rest in the hands of the City Council. The expansion of transit service by St. George alone could mean that outlying jurisdictions have no decision-making power regarding the transit service their communities receive. Consequently, many local officials and stakeholders have recommended that a new governance and funding structure be considered to provide regionalized public transit. The sections of this chapter address the governance aspect and will:

• Describe a simple framework for assessing the governance options, by highlighting the goals that the region should seek to meet and by setting out an overarching principle that should guide the governance and funding discussions.

• Review the range of potential governance structures under consideration and highlight the pros and cons of each.

• Discuss potential decision steps for the region, which will tie directly into the paper’s final recommendations in Chapter 6.0.

3.1 Dixie Region Framework for Assessing Governance

Changes to the transit system can sometimes be a complicated topic for public agencies and local jurisdictions to pursue. Riders often have strong opinions about changes to transit service (e.g., schedule
changes or route alterations) and citizens and local interest groups generally have strong opinions about changes to transit funding, especially since in most cases this translates into a change in tax rates. Governance and institutional structure, by contrast, are often viewed with indifference by the public – a bus rider may not know whether bus service is provided by the city, the county, or an independent transit agency; or they may not know who represents them on the governing board of the transit agency. Yet governance and institutional structure are critical to long-term stability of a transit service and the ability to maintain and improve this service over time. Therefore, it is crucial that the leaders of the Dixie region understand the implications of various governance approaches as they develop and implement their recommendations. The simple framework outlined below – consisting of four goals and an overarching principle – will assist in that understanding.

Any transit governance structure being considered for the Dixie region should be measured against the following four goals:

A. **Provide an institutional mechanism for expanding transit beyond the current service area**: This is the most basic hurdle that needs to be met. The governance structure must allow the City of St. George and the outlying cities to jointly make, implement and fund decisions regarding transit services that cross jurisdictional boundaries.

B. **Support the broadening and stabilizing of the funding base for transit**: The governance structure must be compatible with any transit funding sources being considered in the region. The public entity that oversees transit must be able to receive and disburse federal, state and local funds (for both capital investment and ongoing operations) and the governing board of the entity should include representatives of all jurisdictions participating in the funding of transit. (This is part of the overarching “alignment” principle below.) In addition, successful long-term transit expansion will depend on stable funding. Therefore, the governance structure should encourage stable funding rather than pitting transit funding against other public needs.

C. **Ensure cost-efficient service delivery and avoid duplication**: The institutional structure should be designed to avoid duplication of both service and staffing, in order to maximize the effectiveness of the available funding.

D. **Allow flexibility**: Different areas in the region may have different transit needs and desires. One city might want transit service which serves a downtown loop, while another might want express commuter service. The governance structure should allow different parts of the region to progress at different rates and to have a say in the type and level of transit service in their jurisdiction.

As the various governance options are reviewed in the next section, these four goals will be used to guide the assessment of the viability and appropriateness of each option.

Finally, there is an overarching principle that should guide the governance and funding discussions in the Dixie region: **Ensure that service provision, governance and funding are aligned**. This can be thought of as a triangle, with each side of the triangle providing slightly different guidance as illustrated in Figure 3–1 and summarized below.
3.2 Governance Options

Four potential governance structures are described briefly below. They are presented in order of how much change they would entail from the current governance arrangement of SunTran. Following each description is an assessment of how well this structure might serve to advance the long-term goal of expanded and diversified public transportation in the Dixie region.

3.2.1 City Department with Interlocal Agreements

Under this approach, public transportation would remain a department within the municipal government of the City of St. George and final decisions on operations and funding would stay with the St. George City
Council. However, in order to serve demand for travel outside the St. George city limits, the City would enter into interlocal agreements with any outlying jurisdiction requesting transit service. These agreements would spell out the service levels (routing, frequency, etc.), projected ridership and estimated costs (both capital and operating) of the new inter-jurisdictional bus service. The outlying jurisdictions would then be responsible for providing the necessary local funding match in order to make the new service a break-even financial proposition for the City of St. George. Examples from the case studies of transit providers operating with this type of governance include Pocatello Regional Transit and Transfort.

While this approach offers only an incremental change over the current arrangement, it offers a number of advantages:

- It is immediately available – if the required funding could be identified, local officials could draft and execute such an interlocal agreement within a matter of months.
- It allows for experimentation and testing of new services. Since the outlying jurisdictions currently have no transit service, it may be difficult to project exactly when and where new service would be most successful. The interlocal agreements could be flexible, allowing for services to be expanded, modified, or eliminated as needed.
- No duplication of staffing will be required, as the outlying jurisdictions will take advantage of the already-existing SunTran managerial and operational structure.
- The outlying jurisdictions will directly control the amount and type of service they receive.

Finally, this approach can potentially be useful as a transition structure that leads to a more unified regional structure down the road. Since the outlying jurisdictions currently have no experience with transit service, their citizens and elected officials may be hesitant to join a full-scale regional transit authority. This transition structure with interlocal agreements could give those jurisdictions a chance to experiment with public transit service, prove to their citizens that the service is useful and worth supporting and then pursue the creation of a longer-term and more permanent regional transit entity.

The major drawback to this approach is that it does not address long-term funding needs. Chapter 3.0 identifies some potential funding sources (such as Medicaid funds, university partnerships and the reprioritization of existing funds) that could be drawn on to support short-term transit service expansion via interlocal agreement, but this approach still leaves regional transit subject to annual appropriations at a city-by-city level. This reduces long-term stability and increases the chances of a given city eliminating its transit service during an economic downturn.

### 3.2.2 County Department

St. George and its surrounding cities are situated in Washington County. Although the County Board of Commissioners currently has no responsibility for public transportation, the County does have a Public Works Department that is responsible for roads, bridges, drainage and other engineering and construction projects within the County. A second approach to transit governance in the Dixie region would be to transfer responsibility for public transit to Washington County. This type of governance was used in Merced County prior to the formation of the interlocal transit entity or joint powers authority, Merced County Transit.

This approach has both advantages and disadvantages. The advantages include:

- As with the City department option, the County Public Works department already exists. A transition period (and associated transition costs) would be necessary to transfer SunTran’s
existing assets to the County and some compensation might be due to the City, but this still could be achieved relatively quickly if all parties agreed.

- The County existing governance structure provides representation for all residents within the region.

The disadvantages to a County approach, however, appear substantial:

- The County Commission must represent the entire County, including urban, small town and rural areas. Public transportation, by contrast, is primarily an urban service and the representatives of St. George and the surrounding cities are likely to have the best understanding of their transit needs and constraints. The County Commission structure would only indirectly represent these areas and would not necessarily allow for the flexibility and experimentation that is desired as the outlying jurisdictions try out public transit for the first time.

- As with the City department option, the County option also does not address the concern about stable long-term funding. Washington County is responsible for a number of key public services, (i.e. libraries, courts, solid waste disposal, etc.) and the addition of public transit to the County’s portfolio of responsibilities could simply put transit in competition for very limited public funds.

- SunTran relies on many city services for its operation. Although many of these services are also provided on the County level, Washington County does not currently have the vehicle maintenance division that would be required if the County were to assume responsibility for transit operation.

3.2.3 Interlocal Entity

In this approach, the Dixie region would create a new entity to deliver public transportation, but the new entity would rely on existing jurisdictions and entities (such as the cities, the County and/or the Metropolitan Planning Organization) for its authority. The new transit entity would be formally created as an interlocal entity with responsibility for public transportation and it would exert day-to-day control over the delivery of transit service, but the constituent jurisdictions would still retain ultimate control over whether or not to participate in the service.

Two of the case study systems in Chapter 1.0 – Merced County Transit in California and NAIPTA in Arizona – provide slightly different examples of potential interlocal entity design.

- Transit service in Merced is provided through a joint powers authority (JPA) (the equivalent of Utah’s interlocal entity) between the city and county, with the metropolitan planning organization board also serving as the governing board of the JPA. The JPA has a small number of direct employees who then oversee contracted-out transit service. The JPA was formed in order to combine city and county transit services that had previously been separate, but the JPA itself does not have taxing authority.

- NAIPTA is a multi-county authority created through special state legislation, but it too derives its mandate over regional public transportation from its partner agencies. The NAIPTA board is made up of representatives from each agency and the agencies fund their transit services separately and determine annually how much transit service is needed in their coverage area.

The inter-governmental agency approach can offer some interesting advantages, in that it can avoid duplication of effort and encourage economies of scale while simultaneously allowing for local branding.
and service decisions. It also, as in the case of Merced, can take advantage of an existing regional entity like an MPO and utilize its built-in regional representation to ensure that the governing board is not dominated by the central city.

However, the interlocal approach can be clumsy and in most cases it is pursued in regions where the key concern is the integration of multiple existing operators. This is simply not the case in the Dixie region, where SunTran is the only existing operator and the outlying jurisdictions have to date shown no inclination to create their own independent transit agencies. If a truly regional transit agency is desired, other approaches are more appropriate for the Dixie region.

3.2.4 Public Transit District

The final governance approach is to eliminate the City of St. George’s responsibility for public transportation entirely and create a new, independent regional transit district. This district could be created under the requirements laid out in Utah Code §17B-2a-801, similar to UTA or the Cache Valley Transit District and it could be formed to include the City of St. George and whatever outlying jurisdictions (and unincorporated parts of Washington County) wished to join. A public transit district created through Utah legislation is, by definition, independent of the communities which it serves. The long-term advantages of this approach are potentially substantial:

- The Utah legislation provides an option for voter approval of dedicated transit funding that would flow to the new transit district. This addresses two primary concerns highlighted throughout the chapter. First, it removes transit from competition with other key public services and second, it encourages stability and growth since future funding is more certain.

- The governing board of the new district can be designed from the outset to provide representation that aligns with the financial contributions and service needs of each of the jurisdictions it covers.

- The ballot referendum for the creation of the district (or the district’s bylaws once it is created) can stipulate the steps required for a new jurisdiction to join the district or for a current jurisdiction to leave the district. This can encourage stability of membership and can also allow smaller jurisdictions to postpone joining the district until they have grown larger or have determined that their citizens will support joining the regional funding mechanism.

The most obvious disadvantage to the public transit district is that a very significant amount of effort is required to create a public transit district. A proposal to create a new layer of government and impose a new tax will likely face immediate resistance among certain interest groups and segments of the voting population. As will be discussed in Chapter 4.0, a major outreach effort will be required to educate the public about the value of public transit; to build support groups for the ballot initiative; and to track and gauge voter attitudes and adjust the proposal accordingly if needed.

3.3 Next Steps

Chapter 6.0 will lay out the study’s formal recommendations and next steps regarding governance, funding and public outreach. But based on the information provided above, it appears that an independent public transit district is the best long-term governance approach for the Dixie region. An independent transit district will provide a mechanism for expanding transit beyond the City of St. George; it will offer a chance to design a transit-focused regional governing board that can be responsive to the distinct service needs in the different jurisdictions; and, perhaps most importantly, it offers a governance structure that is compatible with the most likely dedicated funding options that are available under current Utah code.
However, as noted above, the outlying jurisdictions may not be willing to move in a single jump from no transit service to “membership in a regional transit district.” Therefore, in the short-term, it appears that interlocal agreements between SunTran and the outlying jurisdictions could provide a viable transitional structure for the first few years. In particular, the City of St. George and the outlying cities could partner through interlocal agreements to develop a proof of concept transit service in order to build public support for transit. This inter-jurisdictional bus service, if successful, would then provide the foundation for the public education and outreach campaign necessary to create a permanent, independent public transit district.

4.0 OPTIONS FOR TRANSIT FUNDING

A review of the case studies illustrates several potential methods for funding a regional transit service. Funding strategy will likely involve short-term mechanisms to promote incremental expansion and long-term funding sources to establish a sustainable regional transit district. The average local revenue contribution from the case studies is 65%, with FTA dollars accounting for 35% of the total operating budget. In all of the case studies except for Pocatello Regional Transit, the operating budget is substantially funded through a dedicated tax (sales tax or property tax) or pass through tax. Provided below in Table 4–1 is a summary of the operating revenue sources for the various transit districts reviewed in the case studies.

<table>
<thead>
<tr>
<th>Entity</th>
<th>Combined Funding Sources (O&amp;M and Capital)</th>
<th>Operating Revenue Sources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pocatello Regional Transit</td>
<td>Pocatello General Fund, Interlocal Communities General Funds, Service Agreements, Fares</td>
<td>FTA, Medicaid</td>
</tr>
<tr>
<td>Missoula Urban Transportation District</td>
<td>Service Area Property Tax, Service Agreements, Fares</td>
<td>FTA</td>
</tr>
<tr>
<td>Transfort</td>
<td>Fort Collins General Fund (0.85% Sales Tax), Service Agreements, Fares</td>
<td>FTA</td>
</tr>
<tr>
<td>Cache Valley Transit District</td>
<td>Service Area Sales Tax (.030%), Service Agreements</td>
<td>FTA</td>
</tr>
<tr>
<td>Merced County Transit</td>
<td>Pass through of California Local Transportation Fund (LTF, 0.25% Sales Tax), Service Agreements, Fares</td>
<td>FTA</td>
</tr>
<tr>
<td>Northern Arizona Public Transportation Authority</td>
<td>Dedicated Transit Tax (0.29%), General Funds</td>
<td>FTA</td>
</tr>
</tbody>
</table>

Utah has several dedicated taxing options to fund a regional transit service. This chapter addresses the potential funding mechanisms that could be employed by individual participating entities or through interlocal agreements pursuant to an interlocal agency, special service district, or combinations of each, all of which focus on local, state and federal funding options. The options evaluated in this chapter are
available to assist in funding mass transit services within the Dixie region. All options have general
applicability but may not be available to each local governmental entity. The application of specific
dedicated taxing options is predicated upon statute and requires voter authorization.

### 4.1 Local Dedicated Taxation Options

There are several options for local governments to raise revenue through dedicated taxes to fund public
transportation facilities, including transit systems. Utah Code §59-12-(2212-2218) highlights these
options, as summarized in Table 4–2.

#### Table 4–2: Summary of Sales and Use Tax Option to Fund Public Transit

<table>
<thead>
<tr>
<th>Code Ref.</th>
<th>General Title</th>
<th>Tax Rate %</th>
<th>Taxing Entities</th>
<th>Voter Authorization</th>
<th>Purpose of Tax Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>59-12-2213</td>
<td>MT (Mass Transit Tax)</td>
<td>0.25% if 2216 is imposed; 0.30% if 2216 is not imposed</td>
<td>Individually: County, City or Town</td>
<td>Yes</td>
<td>Fund system of public transit</td>
</tr>
<tr>
<td>59-12-2214</td>
<td>MA (Additional Mass Transit Tax)</td>
<td>0.25%</td>
<td>Individually: County, City or Town</td>
<td>Yes</td>
<td>Funding system of public transit; and to fund a project or service related to an airport facility</td>
</tr>
<tr>
<td>59-12-2215</td>
<td>HT (Highway Tax)</td>
<td>0.30%</td>
<td>Individually: City or Town</td>
<td>Yes</td>
<td>Fund construction or maintenance of highways under the jurisdiction of the city or town imposing the tax, or system for public transit</td>
</tr>
<tr>
<td>59-12-2216</td>
<td>MF (Mass Trans. Fixed Guideways)</td>
<td>0.30%</td>
<td>County (Including Cities and Towns)</td>
<td>Yes</td>
<td>Fund project or service related to a fixed guideway, a project or service relating to a system for public transit and selected projects relating to a state highway</td>
</tr>
<tr>
<td>59-12-2217</td>
<td>CT (County Option Transportation)</td>
<td>0.25%</td>
<td>County (Including Cities and Towns)</td>
<td>Yes</td>
<td>Fund projects or services relating to a regionally significant transportation facility, new capacity or congestion mitigation, or other transportation projects as prioritized by the MPO</td>
</tr>
<tr>
<td>59-12-2218</td>
<td>HH (County Airport, Highway, Public Transit)</td>
<td>up to 0.25%</td>
<td>County, City or Town (Second Class County)</td>
<td>Yes</td>
<td>Fund Second Class State Highway Projects Fund, expended for a project or service relating to an airport facility, system of public transit</td>
</tr>
</tbody>
</table>

A comparison of communities along the Wasatch Front, illustrates that several of the tax options identified
above are employed to generate revenues for public transportation and transit systems.

- Of the 290 reported taxing entities, 107 currently collect the Mass Transit Tax, with 58 collecting the Additional Mass Transit Tax.
- The average combined sales and use tax for all taxing agencies within the State of Utah is 6.4%.
- The average for all taxing entities in Washington County is 6.16%, with an average of 6.07% excluding Springdale which assesses a 1.60% Resort Community tax.
The average combined tax rate for communities that assess both the Mass Transit and Additional Mass Transit Tax is 6.8%.

If the communities of Ivins, Santa Clara, St. George and Washington City initiated similar taxes, each of their respective sales tax rates would reach 6.8%. The following discussion addresses the potential revenues should these communities adopt a rate at this level.

### 4.1.1 Description of Public Transit Sales and Use Tax Options

**Mass Transit Tax (MT): Individually by County, City, or Town**

According to Utah Code §59-12-2213, a county, city, or town may impose a sales and use tax to fund a system for public transit up to 0.25% on the transactions located in their respective jurisdictions and described in §59-12-103(1). If a tax is not imposed under §59-12-2216, a county, city, or town may impose a sales and use tax up to 0.30%.

Notwithstanding §59-12-2208, a county, city, or town legislative body is not required to submit an opinion question to the county, city, or town's registered voters in accordance with §59-12-2208 to impose a sales and use tax under this section if the county, city, or town imposes the sales and use tax under §59-12-2216 on or before July 1, 2011. The tax related to §59-12-2216 has not been imposed by the legislative body of Washington County. Therefore, the MT could be imposed by each of the participating communities at the level of 0.30% with voter authorization.

The dedicated mass transit tax is the recommended option for long-term funding of a transit system.

**Additional Mass Transit Tax (MA): Individually by County, City, or Town**

According to §59-12-2214, a county, city, or town may impose a sales and use tax of 0.25% on the transactions within the county, city, or town to fund the following:

- a system for public transit; and/or

- to fund a project or service related to an airport facility.

It is important to note that in order to assess this tax to fund an airport facility, the following conditions must apply:

- **County**: the airport facility should be a part of the regional transportation plan of the area metropolitan planning organization if a metropolitan planning organization exists for the area.

  OR

- **City or Town**: the city or town must be located within a county of the second class; the city or town must own or operate the airport facility; and an airline must be headquartered in the city or town.

While the MA tax is also an option for St. George to assist in funding public transit, it is recommended that this funding mechanism be reserved for the future as a dedicated funding source to assist in funding projects or services related to the airport.
**Highway Tax (HT): Individually by City or Town**

According to §59-12-2215, a city or town may impose a sales and use tax of up to 0.30% on the transactions located within the city or town for the construction and maintenance of highways under the jurisdiction of the city or town imposing the tax; to fund a system for public transit; or for a combination of both. While this tax is currently imposed by each of the participating entities, it will not serve as a dedicated local revenue source and is currently used for other projects.

**Mass Transit Fixed Guideways Tax (MF): County Option**

According to §59-12-2216, a county legislative body may impose a sales and use tax of up to 0.30% on the transactions within the county, including the cities and towns within the county, for a project or service relating to a fixed guideway or for a service relating to a system for public transit, except for a fixed guideway (for the portion of the project or service that is performed within the county). This tax could assist in complying with Vision Dixie 2035 transit goals to preserve major road and transit corridors by preserving right of ways for streetcars, dedicated bus lanes, transit oriented district (TOD) zones, etc. Although, this option could be imposed by the County for public transit projects, this is a county-wide sales tax. Since the SunTran System will specifically serve the communities mentioned in this analysis, a county-wide sales tax may not be a feasible option for the short-term as it would collect revenues from communities that would not see the benefit of the system. Should a fully regionalized transportation network be established, a county-wide tax may be feasible perhaps 15 to 20 years in the future.

**County Option Transportation (CT): County Option**

According to §59-12-2217, a county legislative body may impose a sales and use tax of up to 0.25% on the transactions within the county, including the cities and towns within the county for a project or service related to the following:

- a regionally significant transportation facility for the portion of the project or service that is performed within the county;
- for new capacity or congestion mitigation if the project or service is performed within a county of the first or second class or if that county is part of an area metropolitan planning organization and the project is on a specific priority list.

This tax would also assist in complying with Vision Dixie 2035 transit goals in limiting traffic congestion and building community-friendly collectors and arterials. Currently the CT tax is imposed by Cache County and Salt Lake County. This tool could also be used by Washington County in the future to assist a transit district as it grows.

**County Airport, highway, Public Transit (HH): Individually by County, City, or Town within Second Class County**

According to §59-12-2218, if, on April 1, 2009, the county legislative body (second class county) does not impose a sales and use tax under this section—a city or town within the county may impose a sales and use tax under this section on the transactions within that city or town.

The county may impose a sales and use tax on the transactions within the county (including cities and towns), if the cities and towns do not (or have not provided notice to do so).

The county, city or town may impose a tax rate of 0.10% or 0.25%. Under the 0.25% rate, 0.10% can be expended on a project or service relating to a system for public transit for the portion of the project or
service that is performed within the county, city, or town within which the sales and use tax is imposed; or 
expended for a project or service relating to an airport facility for the portion of the project or service that 
is performed within the county, city, or town within which the sales and use tax is imposed.

As of the date of this report, Utah County is the only County that imposes this tax. Similar to the MF tax, 
the HH tax could also be used to assist in complying with Vision Dixie 2035 transit goals to preserve 
major road and transit corridors sometime in the future.

4.1.2 Analysis of Potential New Sales Tax Revenue (Dedicated Transit Tax)

As transit service expands and becomes regional, a dedicated revenue and funding source is mandatory. 
Long-term it is recommended that a transit district be established and a dedicated sales tax imposed. Of 
the options illustrated, the combined Mass Transit Tax and Additional Mass Transit Tax, authorized under 
§59-12, Utah Code, appear to be the most viable options for this analysis. Although the Highway Tax is 
currently imposed by each of the potential participating entities, it will not serve as a dedicated local 
revenue source as it is currently earmarked for other projects.

The combination of the Mass Transit and Additional Mass Transit taxes would result in a 0.55% sales tax 
rate increase. According to 2010 sales tax information, the potential transit system participating 
communities combined taxable sales was approximately $7.4 billion. An increase of 0.55% on taxable 
sales within the study area would result in an increase of $10 million dollars in year one. Therefore, if 
these entities applied only a portion of these authorized transit taxes the results would be a significant 
increase for expansion of services. Table 4–3 provides an analysis of annual revenues available for mass 
transit services assuming the maximum imposition of §59-12-2213 and §59-12-2214. The total annual 
amount of transit tax revenues (Ivins, Santa Clara, St. George and Washington) is $9.2 million. For 
alternative scenarios describing potential tax revenues for imposing these taxes, including data for 
Hurricane, see Appendix B.

<table>
<thead>
<tr>
<th></th>
<th>Ivins</th>
<th>Santa Clara</th>
<th>St. George</th>
<th>Washington City</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>2011 Tax Rates</strong></td>
<td>6.25%</td>
<td>6.25%</td>
<td>6.25%</td>
<td>6.25%</td>
<td></td>
</tr>
<tr>
<td><strong>2011 Taxable Value Data</strong></td>
<td>$528,386,339</td>
<td>$254,745,440</td>
<td>$4,722,756,033</td>
<td>$1,093,579,372</td>
<td>$6,599,467,184</td>
</tr>
<tr>
<td><strong>2010 Taxable Sales</strong></td>
<td>$22,279,849</td>
<td>$18,396,840</td>
<td>$1,393,690,095</td>
<td>$242,280,151</td>
<td>$1,676,646,935</td>
</tr>
<tr>
<td><strong>Zip Code</strong></td>
<td>84738</td>
<td>84765</td>
<td>84770/84790</td>
<td>84780</td>
<td></td>
</tr>
<tr>
<td>Revenue from Mass Transit Tax</td>
<td>$66,839.55</td>
<td>$55,190.52</td>
<td>$4,181,070.29</td>
<td>$726,840.45</td>
<td>$5,029,941</td>
</tr>
<tr>
<td>Revenue from Additional Mass Transit Tax</td>
<td>$55,699.62</td>
<td>$45,992.10</td>
<td>$3,484,225.24</td>
<td>$605,700.38</td>
<td>$4,191,617</td>
</tr>
<tr>
<td><strong>Total Potential New Revenues</strong></td>
<td>$122,539.17</td>
<td>$101,182.62</td>
<td>$7,665,295.52</td>
<td>$1,332,540.83</td>
<td>$9,221,558</td>
</tr>
<tr>
<td><strong>Potential New Rate</strong></td>
<td>6.80%</td>
<td>6.80%</td>
<td>6.80%</td>
<td>6.80%</td>
<td></td>
</tr>
</tbody>
</table>

**Assumptions**
- Local Mass Transit Tax: 0.30%
- Additional Mass Transit Tax: 0.25%
- Total Tax: 0.55%

Currently SunTran generates approximately $350,000 in local funds. Cache Valley Transit District has 
an operating budget that includes $2.3 million of locally generated funds. Thus, both the mass transit 
and additional mass transit taxes may not be necessary to fund a regional transit system that would be 
the size and type of the Dixie region system. The dedicated mass transit tax (MT, §59-12-2213) is the
recommended option for long-term funding of a transit system. While the additional mass transit tax (MA, §59-12-2214) is also an option for funding a public transit system, it is recommended that this tax be reserved to assist in funding projects and services related to the airport at a later date.

4.2 Alternative Local Funding Mechanisms

Establishing a dedicated funding mechanism for a regional transit system is the ideal method for creating a sustainable program. However, the ability to establish this dedicated revenue source will require public support, interlocal cooperation and additional planning. As a result, short term funding mechanisms may be necessary to fund increased operating and maintenance costs (O&M), as well as capital improvements. Additionally, short-term or “interim” funding options are essential in taking full advantage of federal funding and extending services beyond current geographic locations. Although these mechanisms may not serve as long term solutions, they can act as effective “stop-gap” funding sources to help reach the overall objective. The following sections address the alternative funding mechanisms that may be useful for a regional transit initiative. While many of these funding mechanisms consist of taxes, it is important to note that the potential participating entities currently assess these taxes. An appropriation of existing tax revenues has been examined to fund O&M and capital improvements in the short term.

4.2.1 Appropriation of Highway Taxes

Table 4–4 provides an analysis of the revenues currently collected from the imposition of §59-12-2215 for the construction and maintenance of highways and to fund a system for public transit. Depending on the current use of these revenues, a portion of this tax could be dedicated to fund a regional transit system. This tool may be a feasible method to collect revenues for a transit system in the short term as this tax is currently in place and would not require voter approval or an additional tax increase.

Table 4–4: Comparison of Actual Revenues from 0.30% Highway Tax & Potential Contribution

<table>
<thead>
<tr>
<th></th>
<th>Annual Reported Revenues from Highway Tax</th>
<th>7.7% Contribution</th>
<th>10% Contribution</th>
</tr>
</thead>
<tbody>
<tr>
<td>St. George</td>
<td>$4,558,176</td>
<td>$350,980</td>
<td>$455,818</td>
</tr>
<tr>
<td>Ivins</td>
<td>101,940</td>
<td>$7,849</td>
<td>$10,194</td>
</tr>
<tr>
<td>Santa Clara</td>
<td>71,892</td>
<td>$5,536</td>
<td>$7,189</td>
</tr>
<tr>
<td>Washington City</td>
<td>810,540</td>
<td>$62,412</td>
<td>$81,054</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$5,542,548</strong></td>
<td><strong>$426,776</strong></td>
<td><strong>$554,255</strong></td>
</tr>
</tbody>
</table>

Assuming the entire amount of SunTran’s $350,000 in local funds comes from the highway tax imposed by the City of St. George, roughly 7.7% of the highway tax is dedicated to SunTran. If each of the potential participant communities that currently collect revenues from the highway tax contributes this same percentage, it would result in an additional $76,000 of additional local revenue that could be used to leverage unused FTA dollars (or a total of $427,000 including St. George’s contribution). If 10% of the total revenues from the highway tax were contributed to funding a transit system, this would result in approximately $554,000.

4.2.2 Class B & C Road Funds

In the short-term another option to fund regional transit may be an appropriation of existing Class B & C road funds. The Class B & C road system is a funding program that provides assistance to counties and incorporated municipalities for the improvement of roads and streets throughout the state. These funds differ from traditional local revenues as they are regulated by the Utah Department of Transportation as the administrative authority on behalf of the State. Class B & C road funds are used for roadway
improvements and appurtenances, which may include planning for public transit impacts and funding improvements related to public transportation.

The participating entities may consider a temporary allocation of existing Class B & C road funds to help offset capital improvements related to roadway improvements and new facilities that will help facilitate regional transit projects. By using only 10-15% of the annual road fund receipts the result would be approximately $358,000 - $537,000 in fund revenues that could be used to leverage the current FTA dollars that go unused. Appendix C provides alternative scenarios and sensitivity related to percentage of contribution. This option would only be for the next two or three years while the dedicated revenue sources are planned and implemented.

Table 4-5 shows total Class B & C road funds allocated to each area within Washington County as well as potential fund revenues assuming a ten and 15% contribution.

<table>
<thead>
<tr>
<th></th>
<th>Total For Year (FY 2011)</th>
<th>10% Contribution</th>
<th>15% Contribution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ivins</td>
<td>$296,033</td>
<td>$29,603</td>
<td>$44,405</td>
</tr>
<tr>
<td>Santa Clara</td>
<td>$235,554</td>
<td>$23,555</td>
<td>$35,333</td>
</tr>
<tr>
<td>St George</td>
<td>$2,354,572</td>
<td>$235,457</td>
<td>$353,186</td>
</tr>
<tr>
<td>Washington City</td>
<td>$698,042</td>
<td>$69,804</td>
<td>$104,706</td>
</tr>
<tr>
<td>Total</td>
<td>$3,584,202</td>
<td>$358,420</td>
<td>$537,630</td>
</tr>
</tbody>
</table>

It is important to note that existing Class B & C road funds may already be reserved for the repayment of debt or for other obligations. For example, St. George’s 2004 Excise Revenue Bonds are secured by Class C road funds from the General Fund. The bonds are being repaid at an annual amount ranging from $690,000 to $750,000 thru 2013. This level of debt service represents approximately 32% of the total annual Class C road fund monies.

4.2.3 General Sales and Use Tax Appropriation

Alternatively, interested Cities may fund O&M and capital expenses through an appropriation of existing sales tax revenues from their general fund. Sales tax revenues are one of the main sources of revenue for a City’s General Fund, thus an appropriation from this source would be a short term solution as these revenues are used to provide other governmental services. To avoid long-term impacts to other services, these revenues may be one time contributions to offset the higher expenses of the first year to organize and implement the regional service. As shown in Table 4–6, a comparison of 2010 taxable sales data illustrates that a five percent allocation from the participating entities and from the County of the locally generated sales tax revenues could result in approximately $1 million in revenues that could be used to leverage FTA money in the interim. See Appendix D for alternative scenarios and sensitivity related to varying percentage contributions.
Table 4–6: Illustration of Sales Tax Revenues by Community

<table>
<thead>
<tr>
<th></th>
<th>Ivins</th>
<th>Santa Clara</th>
<th>St. George</th>
<th>Washington City</th>
<th>Total</th>
<th>Washington County (County-wide)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010 Taxable Sales</td>
<td>$22,279,849</td>
<td>$18,396,840</td>
<td>$1,393,690,095</td>
<td>$242,280,151</td>
<td>$1,676,646,935</td>
<td>$2,009,882,778</td>
</tr>
<tr>
<td>Zip Code</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local Option (@ 1%)</td>
<td>$222,798</td>
<td>$183,968</td>
<td>$13,936,901</td>
<td>$2,422,802</td>
<td>$16,766,469</td>
<td>$20,098,828</td>
</tr>
<tr>
<td>County Option (@ .25%)</td>
<td>$55,700</td>
<td>$45,992</td>
<td>$3,484,225</td>
<td>$605,700</td>
<td>$4,191,617</td>
<td>$5,024,707</td>
</tr>
<tr>
<td>Total</td>
<td>$278,498</td>
<td>$229,961</td>
<td>$17,421,126</td>
<td>$3,028,502</td>
<td>$20,958,087</td>
<td>$25,123,535</td>
</tr>
<tr>
<td>5% Allocation to Regional Transit</td>
<td>$13,925</td>
<td>$11,498</td>
<td>$871,056</td>
<td>$151,425</td>
<td>$1,047,904</td>
<td>$1,256,177</td>
</tr>
</tbody>
</table>

Additionally, many Utah cities transfer funds from the general fund to capital projects funds annually to keep the unrestricted fund balance below the maximum 18%. If cities choose to make transit service a higher priority, some of these funds could be contributed to transit services for a short period of time.

Before establishing a percent allocation to regional transit, it should be considered that some sales tax revenues are dedicated for the repayment of debt. Washington County and several of the study cities have outstanding debt secured by sales tax revenues as follows:

- **Washington County** – Series 2006 Sales Tax Revenue Bonds payable in amounts ranging from $115,000 to $485,000, maturing in 2036.

- **St. George** - Series 2011 Sales Tax Revenue Refunding Bonds with annual payments from $400,000 to $870,000 thru 2015 and Series 2009 Sales Tax Refunding Bonds with annual payments from $2,425,000 to $2,980,000 thru 2017.

- **Ivins** - Series 2010 Sales Tax Revenue bonds due in annual principal installments ranging from $125,000 to $235,000, with semi-annual interest at an average annual rate of 3.25%, maturing October 1, 2027. However, 43% of this bond will be repaid through a Special Assessment Area.

- **Washington City** – Series 2001 Sales Tax Revenue Bonds with annual payments of $33,000 to $89,000 with final payment due November 15, 2016 and Series 2003 Sales Tax Revenue Bonds payable in annual installments of $145,000 to $320,000 through 2023.

An alternative to an appropriation of existing sales tax revenues is the application of a general sales tax increase, similar to the tax increases considered by UTA communities in 2007 and 2008. The Utah Transit Authority (UTA) proposed several communities along the Wasatch Front impose a sales-tax hike of 0.05% to offset budget reductions of approximately $17 million (2007) that arose after lawmakers cut the sales tax on food. Similarly, this interim funding source could be dedicated to an interlocal agency in order to extend services and leverage federal grant dollars. While this was utilized in the Wasatch Front, it would not be a feasible option for Washington County based on current legislation and state law.

### 4.2.4 Tourism Taxes

Tourism related taxes were reviewed as well to determine potential short-term funding sources. Many of the taxes listed below are existing taxes and would not result in a tax increase; however, a discussion of re-prioritizing public service needs would be required in order to determine if Washington County has the flexibility in using these sources even to a small degree to address public transportation. A description of each is included for informative purposes.
**Transient Room Tax (TR, 59-12-301)**

According to §59-12-301, a county legislative body may impose a tax on charges for accommodations and services (described in Subsection §59-12-103(1)(i)) at a rate of not to exceed 4.25% beginning on or after October 1, 2006. This tax is in addition to the Tourism, Recreation, Cultural and Convention Facilities Tax (TRCC), which includes TT, FG, FF and FP (as described in §59-12-603). The County currently assesses this tax.

**Municipal Transient Room Tax (TM, 59-12-352)**

According to §59-12-352 governing body of a municipality may impose a tax of not to exceed 1% on charges for accommodations and services (described in Subsection §59-12-103(1)(i)) for general fund purposes. Of the entities discussed in this study, all assess the one percent municipal transient room tax except Washington City.

**Additional Municipal Transient Room Tax (TA, 59-12-353)**

In addition to the TM tax, the governing body of a municipality may impose a tax of not to exceed .5% on the services described above if the municipality meets certain limitations. However, this tax is minimally utilized and does not appear to be a viable funding option for participating entities.

**Motor Vehicle Rental Tax (MV, 59-12-1201)**

All short-term leases of rental motor vehicles (not exceeding 30 days) are taxed at 2.5%. This is in addition to all other state, county, or municipal fees and taxes imposed on rentals of motor vehicles.

Except for some administrative fees, the revenue received by the tax commission under this section is deposited into the Transportation Corridor Preservation Revolving Loan Fund and would not be a viable local funding option.

**TRCC: Transient Room (TT, 59-12-603)**

According to §59-12-603, a county legislative body of a **first class** may impose a tax of not to exceed .5% on charges for accommodations and services (described in Subsection §59-12-103(1)(i)). This revenue source does not apply to Washington County, which is currently designated as a county of the second class.

**TRCC: Restaurant (FG, 59-12-603)**

According to §59-12-603, a county legislative body of any county may impose a tax of not to exceed 1% of all sales related to alcoholic beverages, food (and food ingredients) or prepared food sold by a restaurant.

**TRCC: Short-Term Leasing Tax (FF, 59-12-603)**

Any county may impose a tax of not to exceed 3% on all short-term leases and rentals of motor vehicles not exceeding 30 days (with some exceptions related to temporary replacement vehicles).
**TRCC: Short-Term Leasing Population (FP, 59-12-603)**

Counties that impose the Tourism-Short Term Leasing tax, may, in addition, impose a tax of not to exceed 4% on all short-term leases and rentals of motor vehicles not exceeding 30 days, (with some exceptions related to temporary replacement vehicles).

The revenues collected from the Tourism, Recreation, Cultural and Convention Facilities (TRCC) tax may be used for:

1. financing tourism promotion; and
2. the development, operation and maintenance of an airport facility; a convention facility; a cultural facility; a recreation facility; or a tourist facility.

However, the TRCC taxes do not appear to be a feasible option for short-term or long-term funding of regional transit, as these funds are more closely related to tourism and are currently utilized to fund the Dixie Center. Notwithstanding, it is noted that where specific public facility needs have arisen, the Utah State Legislature has shown a willingness to modify existing funding options to accommodate local needs especially transportation oriented priorities.

### 4.3 Supplemental Local Funding Mechanisms

In addition to the local funding mechanisms described above, the case studies illustrate the potential for limited additional revenues from contracts with educational institutions and sponsorships.

#### 4.3.1 College and University Contracts

The majority of the case studies utilize funds generated through contracts with local colleges and/or universities to fund their systems. The Missoula Urban Transportation District in Montana receives approximately $170,000 per year from the University of Montana in exchange for free fares for its students. PRT, Transfort and The Bus also receive funding from local colleges and/or universities. The funds generated through contracts with colleges and universities can be used as part of the local match because they are not considered fare box revenues by FTA. Colleges and Universities typically fund these contracts through voluntary or mandatory student fees. Dixie State College and the University of Utah extension could potentially be contracted with to provide this type of alternative funding. It is the recommendation of this report that SunTran seek a long-term agreement with Dixie College to provide public transit options to students in exchange for funding from Dixie College. As indicated above the contract revenues could be generated by student fees imposed and collected by the College and paid to the operator of the transit system.

#### 4.3.2 Sponsorships

Many of the case studies highlight the potential for additional revenues to be generated from sponsorships and service agreements with other organizations in the service area although these contributions typically make up a small percentage of the local match. Transfort receives minor funding from advertising and grants from local philanthropies. Other agencies also receive some funding through sponsorships such as CVTD and PRT. For FY 2011, SunTran received $7,400 in advertising fees, $151,165 in fare revenues and $1,416,896 in revenues from Intergovernmental sources (comprised of general fund revenues of $350,000 and federal grants). Additional sponsorships and service agreements may be a source of additional revenues, though this will likely be only a small component of future revenue. SkyWest Airlines and other notable businesses and institutions may be eligible sponsors and
may desire to provide funds for extended services, marketing opportunities and general community
enrichment and support.

4.4 State and Federal Funding & Leverage Mechanisms

4.4.1 CIB Low Interest Loans

One source for funding capital improvements is the Permanent Community Impact Fund Board (CIB)
program, which provides low interest loans and/or grants to state agencies and subdivisions of the state
in order to fund public facilities. The source of funding comes from mineral lease royalties returned to the
state by the federal government. This source of funding is frequently utilized by eligible entities in Utah to
construct capital improvements projects. Projects must be on the current, county-level prioritized Capital
Improvements List in order to be eligible to apply for CIB funding, unless the project a “qualified”
emergency need. The county-level lists are prepared by the county with the assistance of the Association
of Governments for that area. As it relates to this project, the prioritization list would be a function of the
Five Counties Association of Governments. A total of 13 projects totaling $9,817,604 were funded in
FY2011 in Washington County. New projects related to a regional transit system could be included on the
Prioritized Capital Improvement List submitted by the County each year. The funding guidelines for each
project are as follows:

- Total participation in any given project will generally be limited to a maximum of $5,000,000,
  regardless of grant/loan mix.

- Planning, study or design requests require a fifty percent cash contribution from the applicant.

- Applicants cannot count the use of in-kind funds as local matching funds unless the in-kind
  participation has a demonstrable value, such as real property. Donated labor or staff time cannot
  be counted as local matching funds.

4.4.2 Transit Oriented Grant Opportunities

The U.S. Department of Transportation, Federal Transit Administration (FTA) currently sponsors two
types of grant programs:

1. **Formula Grant Programs:** Programs funded to States based on formulas of population.
2. **Discretionary Grant Programs (Competitive):** Grants awarded on meeting application
   requirements and the selected criteria specific to each grant.

The tables below list the formula grant programs and discretionary grant programs sponsored by FTA.
### Table 4–7: Formula Grant Programs

<table>
<thead>
<tr>
<th>Grant Title</th>
<th>Section Of Statute</th>
<th>Brief Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Urbanized Area Formula Program</td>
<td>5307</td>
<td>Transit capital and operating assistance in urbanized areas and for transportation-related planning.</td>
</tr>
<tr>
<td>Formula Grants for Other than Urbanized Areas</td>
<td>5311</td>
<td>Provides funding to States for the purpose of supporting public transportation in rural areas with population of less than 50,000.</td>
</tr>
<tr>
<td>Transportation for Elderly Persons and Persons with Disabilities</td>
<td>5310</td>
<td>Formula for funding to States for the purpose of assisting private nonprofit groups in meeting transportation needs of the elderly and persons with disabilities.</td>
</tr>
<tr>
<td>Rural Transit Assistance Program</td>
<td>5311(b)(3)</td>
<td>Training, technical assistance, research and related support services in rural areas.</td>
</tr>
<tr>
<td>New Freedom Program</td>
<td>5317</td>
<td>Additional tools to overcome existing barriers facing Americans with disabilities seeking integration into the work force and society.</td>
</tr>
<tr>
<td>Metropolitan &amp; Statewide Planning</td>
<td>530,353,045,305</td>
<td>Supports cooperative, continuous and comprehensive planning for making transportation investment decisions.</td>
</tr>
<tr>
<td>Job Access and Reverse Commute Program</td>
<td>5316</td>
<td>Address transportation challenges faced by welfare recipients and low-income persons seeking to obtain and maintain employment.</td>
</tr>
<tr>
<td>Fixed Guideway Modernization</td>
<td>5309(b)(2)</td>
<td>Modernization of existing rail systems and new fixed guideway systems.</td>
</tr>
</tbody>
</table>

### Table 4–8: Discretionary Grant Programs

<table>
<thead>
<tr>
<th>Grant Title</th>
<th>Section Of Statute</th>
<th>Brief Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alternatives Analysis</td>
<td>5339</td>
<td>Assist in financing the evaluation of reasonable alternatives and general options in a particular, broadly-defined travel corridor.</td>
</tr>
<tr>
<td>Bus and Bus Facilities</td>
<td>5309, 5318</td>
<td>New and replacement buses and facilities.</td>
</tr>
<tr>
<td>Clean Fuels Grant Program</td>
<td>5308</td>
<td>Achieving/maintaining standards for ozone and CO and support emerging clean fuel and propulsion technologies for transit buses.</td>
</tr>
<tr>
<td>Major Capital Investments (New Starts &amp; Small Starts)</td>
<td>5309 (b)(1)</td>
<td>Construction of new or extensions to existing fixed guideway systems (New Starts). Capital projects less than $75 million and total capital cost less than $250 million (Small Starts).</td>
</tr>
<tr>
<td>National Research &amp; Technology Program</td>
<td>5314</td>
<td>Develop innovative products and services assisting transit agencies in better meeting the needs of their customers.</td>
</tr>
<tr>
<td>Over-the-Road Bus Program</td>
<td></td>
<td>To assist intercity fixed-route, commuter, charter and tour bus services in complying with &quot;Transportation for Individuals with Disabilities&quot; (49 CFR Part 37, Subpart H).</td>
</tr>
<tr>
<td>Paul S. Sarbanes Transit in Parks Program</td>
<td>5320</td>
<td>Address the challenge of increasing vehicle congestion in and around our national parks and other federal lands.</td>
</tr>
<tr>
<td>Public Transportation on Indian Reservations</td>
<td>5311 (c)</td>
<td>Direct funding to federally recognized tribes for the purpose of supporting tribal public transportation in rural areas.</td>
</tr>
<tr>
<td>TIGER (USDOT)</td>
<td></td>
<td>The American Recovery and Reinvestment Act (ARRA) established the Transportation Investment Generating Economic Recovery Program (TIGER), which fosters innovative, multi-modal and multi-jurisdictional transportation projects that promise significant economic and environmental benefits to an entire metropolitan area, a region, or the nation.</td>
</tr>
<tr>
<td>TIGGER Program</td>
<td></td>
<td>Works directly with public transportation agencies to implement new strategies for reducing greenhouse gas emissions and/or reduce energy use within transit operations.</td>
</tr>
<tr>
<td>Transit Cooperative Research Program</td>
<td>5313</td>
<td>Research program that develops near-term, practical solutions such as best practices, transit security guidelines, testing prototypes and new planning and management tools.</td>
</tr>
<tr>
<td>University Transportation Centers Program</td>
<td>TEA-21 5505</td>
<td>Awarded to non-profit institutions of higher learning, focuses on knowledge transfer (national, state and local) and building transportation workforce.</td>
</tr>
<tr>
<td>Veterans Transportation and Community Living Initiative Capital Grants Program</td>
<td></td>
<td>The Department of Transportation has joined with the Departments of Veterans Affairs, Labor, Defense and Health and Human Services to establish an initiative that will improve transportation options and mobility for America's veterans, service members and their families.</td>
</tr>
</tbody>
</table>


The grant programs that are most applicable to Dixie MPO in creating a regional transit system include the following:

- Urbanized Area Formula Program Grants (5307);
- Major Capital Investments (New Starts & Small Starts)(5309); and
- TIGER Grants.

The sections that follow summarize each of the grant programs. More detail on each program can be found in Appendix E.
4.4.3 Urbanized Area Formula Program (5307)

The Urbanized Area Formula Program makes Federal resources available to urbanized areas and to Governors for transit capital and operating assistance in urbanized areas and for transportation related planning. Additional details regarding the Urbanized Area Formula Program are found in Appendix E. St. George is currently receiving FTA 5307 funds. Since the population of St. George is less than 200,000, the allocation of funds is based on population and population density. These funds typically require a 20% local match for capital expenses. The local match for operational expenses is 50% of the net deficit, which is the total operational expense less fare box revenues. Fare box revenues cannot be used to match federal funds; however other, non-Federal, funds may be used.

In 2008 St. George received $783,960 of FTA 5307 funds. However, due to matching limitations, the City was only able to use $522,490, or approximately 67% of the amount allotted. Should a regional transit system be established, additional projects planned and sufficient local funds become available to match, the City could potentially use the full amount of the FTA 5307 funds allotted, as well as any funds that have not been used in previous years. The tools discussed in Section 4.1 and 4.2, particularly the appropriation of a portion of the existing highway tax, class B & C road funds and general sales tax revenues could be utilized to provide a sufficient match to obtain the full amount of 5307 funds.

In comparison, Cache Valley Transit District (CVTD) used approximately $1,260,000 in FTA funds for operations and $2,580,000 for capital expenditures in 2010.

4.4.4 Major Capital Investments (New Starts & Small Starts)(5309)

The transit capital investment program provides capital assistance for three primary activities:

- New fixed guideway systems;
- New and replacement buses and facilities; and
- Modernization of existing rail systems.

The matching requirements for this program are the same as the FTA 5307 and FTA 5311 matching requirements for capital expenses (i.e. 80% federal, 20% local). St. George is currently receiving 5309 funds. This could also be a funding option in the future for a regional transportation system. See Appendix E for further details.

4.4.5 TIGER (USDOT) Grants

TIGER grants, described in more detail in Appendix E, offer funding for a variety of planning and capital projects. These program grants are awarded on a competitive basis for projects that will have a significant impact on the nation, a metropolitan area or a region. The matching requirement for TIGER grants is 20% local to 80% federal except in rural areas.

Final applications for the FY 2011 TIGER program were due at the end of October of this year (2011). However, it is anticipated that additional FTA funds will be allocated to TIGER grants in the future. For future funding information see: http://www.dot.gov/tiger/index.html.
4.4.6 Formula Grants for Other than Urbanized Areas (5311)

The Formula Grants For Other than Urbanized Areas is a rural program that is formula based and provides funding to states for the purpose of supporting public transportation in rural areas, with population of less than 50,000. The goal of the program is to provide the following services to communities with population less than 50,000:

- Enhance the access of people in non-urbanized areas to health care, shopping, education, employment, public services and recreation.

- Assist in the maintenance, development, improvement and use of public transportation systems in non-urbanized areas.

- Encourage and facilitate the most efficient use of all transportation funds used to provide passenger transportation in non-urbanized areas through the coordination of programs and services.

- Assist in the development and support of intercity bus transportation.

- Provide for the participation of private transportation providers in non-urbanized transportation.

Additional details regarding the Formula Grants for Other than Urbanized Areas can be found in the Appendix E. While FTA 5311 funds are considered a formula grant, money is allocated directly to UDOT and then distributed on a competitive basis throughout the State of Utah. Matching requirements for FTA 5311 funds are the same as the matching requirements for FTA 5307 funds.

The Cache Valley Transit District (CVTD) in Logan, Utah received and used approximately $520,000 in FTA 5311 funds for operations and capital in 2010. This amounted to approximately 6% of their operating budget and 44% of their capital budget. While FTA 5311 funds benefit CVTD, there is little opportunity to take advantage of these funds in the Dixie region as FTA 5311 funds can only be used for service outside of the MPO boundary. Washington City, Santa Clara and Ivins are within the MPO boundary and thus would not qualify to receive these funds. However, if at some point transit service expands beyond the MPO boundary FTA 5311 funds could be beneficial.

4.4.7 Medicaid Funding Options

The Pocatello Regional Transit is a transit agency that uses federal Medicaid monies to assist in providing services to a specific segment of the service population. Chapter 2.0 outlines the similarities of the PRT system and SunTran in terms of governance structure and the potential for the expansion of services based on interlocal agreements and the use of alternative funding mechanisms, like Medicaid, which allow expansion of transit service to areas outside the existing service area.

For example, clients who live in along the Wasatch Front and meet eligibility requirements may be eligible to receive a UTA bus pass to be used for medical transportation. According to the Utah Department of Health, the Medicaid Transportation for Medicaid Clients eligibility requirements are as follows:

1. The person who needs transportation is eligible for Medicaid;
2. The person has a medical appointment or needs a health service covered by Medicaid; and,
3. The person has no transportation to get to the appointment or service.
In 2002, the National Consortium on the Coordination of Human Services Transportation completed a study that highlighted the impacts of Medicaid funding on Utah, specifically the Wasatch Front area (based on Utah, Salt Lake, Davis and Weber Counties). According to this study, an average of 12,000 bus passes were issued each month at a cost to the state from $510,000- $525,000 annually, with the Federal Government covering 50% of the cost. Under this program, the Medicaid agency administers the bus passes rather than the transit agency, essentially purchasing bus passes in bulk and directly mailing the passes to those who qualify, resulting in increased fare box revenues to the transit agency. Further research will need to be conducted to determine the program and revenue impacts from Medicaid funding on a regional transit system in the study area.

4.5 Alternative Financing Options for Capital Expenditures

The following tools are useful for financing capital expenses as they provide for the monetization of revenues based on future cash flows.

4.5.1 Creation of Interlocal Agency

According to Utah Code 11-13-203(2), “any two or more Utah public agencies may enter into an agreement to approve the creation of a Utah interlocal entity to accomplish the purpose of their joint or cooperative action, including undertaking and financing a facility or improvement to provide the service contemplated by that agreement.” Thus, an interlocal agency created for the purpose of funding a regional transportation system could issue any of the following debt described in the table below.

<table>
<thead>
<tr>
<th>Debt</th>
<th>Security</th>
<th>Authorization</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Obligation Bonds</td>
<td>Property Tax</td>
<td>Voter Authorization Required</td>
<td>Can be used for any aspect of the project.</td>
</tr>
<tr>
<td>Lease Revenue Bonds</td>
<td>Object being financed (i.e. buses, facilities)</td>
<td>Requires support by a majority of the governing body of the issuer.</td>
<td>Limited to tangible objects that can be used as security.</td>
</tr>
<tr>
<td>Sales Tax Revenue Bonds</td>
<td>Sales Tax</td>
<td>Requires support by the governing body of the issuer.</td>
<td>Can be used for any aspect of the project.</td>
</tr>
</tbody>
</table>

In addition to the bonds listed in the table above, a regional transportation system may also receive funding from Tax Increment Financing (TIF) or Special Assessment Areas.

4.5.2 Tax Increment Financing (TIF)

Tax increment is generated in a redevelopment area as a result of increased value from development in that particular area. Increment value is determined by calculating the difference between a baseline property value, set when the project area is established and the additional property value from development. If redevelopment areas exist in the region, particularly areas with potential transit oriented development (TOD), tax increment could potentially be used to fund transit oriented projects within those areas.
4.5.3 Special Assessment Areas

Special assessment areas (SAA) are a legal mechanism to raise funds to enhance the maintenance and management of a particular section of a city or town. They are guided by the philosophy that the value of property is not driven solely by the investment made in an individual property, but rather that a major portion of property value is derived from how investors, businesses and visitors view the entire area as a business, retail and cultural center. If some aspect of a transportation system positively impacts a particular area more than the regional in general, a special assessment fee could potentially be assessed to assist in funding transportation to that area. A transit-oriented development (TOD) area would greatly benefit from the creation of a SAA as the SAA could assist in funding public transit elements within the TOD.

4.6 Most Promising Funding Sources

The expansion of transit service will require the application of several funding strategies, focused on short-term and long-term objectives, as described below.

4.6.1 Short-Term Funding Strategy

In 2008 St. George received $783,960 of FTA 5307 funds. However, due to matching limitations, the City was only able to use $522,490, or approximately 67% of the amount allotted. Assuming the same proportion of capital and operating costs in calculating the match, an additional $100,000-$200,000 in matching funds is needed in order to qualify to use the full federal funding. In order to maximize the federal grant monies in the short-term, it is recommended that participants enter into interlocal agreements. The matching funds to support these interlocal agreements can potentially be provided in the short-term by a combination of the recommended funding resources summarized below. Other potential sources discussed previously (such as Medicaid and College contracts) should also be further explored. As transit service expands and becomes more regional, dedicated revenue and funding sources will become mandatory.

Appropriation of Existing Highway Tax

The Highway Tax (HT) §59-12-2215 can be used for the construction and maintenance of highways and to fund a system for public transit. Many cities within Washington County currently impose this tax. Depending on the current use of these revenues, a portion of this tax could be dedicated to funding a regional transit system in the short term as this tax is currently in place and would not require voter approval. A relatively low percentage of total revenues contributed from the highway tax would result in substantial funds to assist in funding a transit system in the short-term.

Class B & C Road Funds

Class B & C Road funds can be used for roadway improvements and appurtenances, which may include planning for public transit impacts. As a result, the participating entities (Ivins, Santa Clara, St. George and Washington) may consider a temporary allocation of existing Class B & C road funds to help offset capital improvements related to roadway improvements and new facilities that will help facilitate regional transit projects. A temporary allocation of a small percentage of annual road fund receipts would produce sufficient revenues to leverage the current FTA dollars that go unused.

Appropriation of Portion of General Sales Tax Revenues

Interested Cities may fund transit services in the short-term through an appropriation of sales tax revenues from its general fund. Similar to Class B & C road funds, a very small allocation from locally
generated sales tax revenues would result in sufficient funds to leverage the current FTA dollars that go unused.

Additionally, many Utah cities transfer funds from the general fund to capital projects funds annually to keep the unrestricted fund balance below the maximum 18%. If cities choose to give higher priority to transit, some of these funds could be contributed to transit services for a short period of time.

**Appropriation of Revenues Attributable to Growth**

Another alternative to funding transit in the short-term consists of a combination of the above options with a contribution of a percentage of the funds only attributable to growth. A dedication of approximately 65% of growth related revenues would produce sufficient funds to leverage the FTA dollars that go unused. See Appendix F for additional details.

4.6.2 Long-Term Funding Strategy

As transit service expands and becomes regional, a dedicated revenue and funding source is mandatory.

**Dedicated Transit Oriented Tax**

Long-term it is recommended that a transit district be established and a dedicated sales tax imposed. The dedicated mass transit tax (MT, §59-12-2213) is the recommended option for long-term funding of a transit system. While the additional mass transit tax (MA, §59-12-2214) is also an option for funding a public transit system, it is recommended that this tax be reserved to assist in funding projects and services related to the airport at a later date.

5.0 STRATEGIES FOR DEVELOPING AND GAUGING PUBLIC SUPPORT

Developing and maintaining public support can be a challenge for many transit providers, especially in cities where transit mode share is relatively low. Riders demand more and better service, while at the same time most voters are not transit users and may feel that they receive no benefit from the transit service. Furthermore, even when funding is available and transit services are well-used, effectively measuring the level of public support can prove to be an obstacle. Nevertheless, public support will be a key component in the creation of a successful regional transit network and this support must be developed, measured and maintained throughout the process of creating the transit agency and throughout the life of the agency. The public can include elected officials and specific interest groups as well as everyday citizens. The support of all of these groups is essential to the overall success of a transit agency.

There are, however, two categories of potential supporters than are particularly important to building consensus for expanded transit. These two categories are:

- Transit users and potential users. This category includes both current transit riders and groups that are likely future users with expanded service. The second group could include, for example, high school and college students, seniors and no-car households. Some can be reached through established organizations, while others, such as low-income individuals, are more difficult to reach.
Community members who recognize the value of and could potentially be an advocate for expanded transit. These are individuals or groups who may:

- Have a direct connection with better transit (such as a family member who would benefit or a business that could attract employees or customers), or
- Strongly believe in the community goals that transit would support (such as environmental quality or economic development)

Both of these support categories can be reached using the tools and strategies discussed below. A good starting point is stakeholder outreach, since many existing organizations represent one or more of these potential support groups. Ideally, the process would provide an opportunity for the interaction of diverse stakeholder groups in order to build greater understanding of the broader needs and community benefits among those with more narrowly focused interests.

In the short term, developing support and a consensus among local government leadership will be crucial. County, cities and other stakeholders must be committed to transitioning to a more regional and dedicated service district. Once these stakeholders are supportive of the direction, governance and funding, the public support tools described below can be used to assist in the implementation process and to better gauge the public interests and desires in expanding transit service. This chapter combines the insights obtained through the case studies with the project team’s knowledge of the public support process to provide several strategies for gauging public support, all of which could be used as a more regional transit network is created in the Dixie region.

### 5.1 Stakeholder Outreach

With any project or initiative it is important to identify and involve all project stakeholders to the extent possible. These stakeholders could include representatives from the business community (such as the local Chamber of Commerce), economic and real estate development firms, environmental groups, transit activists, the elderly and disabled communities, tourist interests and any other relevant or interested group. Initially, through one-on-one stakeholder interviews, individual stakeholders are able to provide their support and/or concerns regarding specific governance or funding proposals candidly and without external influences. These interviews can be formal or informal and they can be conducted with as many or as few stakeholders as deemed appropriate. The end goal of these interviews is to evaluate the political environment and the potential for various proposals to gain the support of the different stakeholders. The interviews can also be used to identify key champions for better transit.

Following initial stakeholder interviews, an on-going method for regular involvement can be established. This could be regular, follow-up meetings with individual stakeholders or a more formal approach, such as creating an advocacy group or committees of existing organizations. While public agencies can help facilitate this approach, there are potential advantages associated with clear leadership from business groups or non-profit community organizations.

Other transit agencies have used this strategy when working with elected officials with some success. For example, CVTD indicated that having lunch meetings with elected officials has been an effective way of gauging support for their system. Occasionally CVTD will also invite these officials to ride the bus with them as a means of demonstrating the effectiveness of the transit service. Many of the other case studies also use this technique on a regular basis to maintain the support of elected officials.

The support of elected officials and other decision makers in the community is key and must be developed prior to seeking the support of the general public. Public support is best developed when
elected officials support the long-term goals of the regional transit system and are included in the public process of developing and measuring support.

**Strengths:**
- Individualized
- Candid, one-on-one environment
- Can be done in-house

**Weaknesses:**
- Time intensive
- Limited coverage

### 5.2 Agency Website and Social Media

The internet is a valuable tool for developing and maintaining public support and can also be used to gauge public support. An agency website can provide a location where constant updates can be posted. Social media networks such as Facebook and Twitter can also be used to provide important updates and collect feedback from the public. Additionally, radio and newspaper advertisements can be valuable in developing an awareness of the transit system.

All of the agencies evaluated for the case studies have some type of website where they post route updates, event announcements and other important information. Many also use social media sites, radio and newspapers to disseminate information. The utilization of an internet based survey has been used in St. George previously by Vision Dixie. During the visioning process of Vision Dixie, 800 residents evaluated four scenarios through an online survey. The results of the online survey were combined with input gathered through other means to eventually develop the Vision scenario. Mountain Line in Missoula has also used this strategy to gather online comments through its website.

**Strengths:**
- Large coverage
- Efficient distribution of information
- Can be done in-house

**Weaknesses:**
- Limited coverage of transit dependent populations such as the elderly

### 5.3 Speaker’s Bureaus

Speaker’s bureaus can be used to reach out to specific groups such as homeowner’s associations, service clubs (e.g., Rotary) and other public and socioeconomic organizations (e.g. downtown alliances/development groups) with the intent of educating them on how their constituents could benefit from the proposal. Each of these groups has its own specific interests and in some cases large public open houses may not be as beneficial as focused, customized presentations. Speaker’s bureaus give the transit agency general manager (or whoever is the most appropriate representative) the opportunity to educate, answer questions and get a sense for the support from the particular organization.
This strategy has been used by many of the case study agencies when addressing city councils. Specifically, Transfort has made presentations to socioeconomic organizations in the Fort Collins downtown area as it has educated the public about its forthcoming BRT route, MAX.

**Strengths:**
- Customized
- Can be done in-house

**Weaknesses:**
- Time intensive, though less so than individual interviews
- Limited coverage

### 5.4 Formal Opinion Polling

Opinion polling can provide the most representative perspective of public support because it is based on scientifically valid sampling techniques. The randomization involved in this measurement tool counteracts biases that may be present in other measurement techniques. Opinion polling can be completed through telephone surveys, mail surveys or household interviews. Many have also included surveys with their water bills (or as separate mailers), provided for return postage prepaid (e.g., return postage is paid by the community, but only on returned surveys albeit at a higher rate on the returned mail) and compiled results. Generally, mail surveys in communities across Utah have had a response rate of 15% to 20%. These surveys should include questions that help determine how the public views transit in general, how they feel about the existing transit service and what they would like to see in a transit system. Best practices include also asking for age and geographic location information from the respondent so that results can be sorted by these factors.

Initial surveys could be used to better understand public awareness of transit and basic levels of support for improved service. The planned household transportation survey is a good tool for this purpose. Appendix F provides potential interview questions for this survey. Regular, follow-up surveys, possibly 2-3 questions in conjunction with other survey efforts, can help gauge attitudes over time, helping to determine how effective other strategies for public support have been. Later, if formal plans for a regional system and dedicated funding are under consideration, a more extensive survey may be needed to evaluate potential ballot success. Many communities have effectively used such surveys to measure the public support for new funding measures. Other agencies have completed similar public polling surveys, usually associated with a study. For example, PRT recently completed a study which included a public polling aspect. PRT hired a consultant to complete the study and the survey. The results of the survey indicated a 96% approval rating of the system in Pocatello. Vision Dixie also used this technique when developing its Vision scenario.
Strengths:

- Scientifically valid sampling
- Provides a representative perspective
- Coverage of transit dependent populations

Weaknesses:

- Likely needs to be contracted out
- Potentially expensive

5.5 Public Open Houses and Workshops

Public open houses and workshops are a commonly used tool for developing, measuring and maintaining public support. They are typically associated with specific projects, but they can be used in a more general environment. Assembling a broad cross-section of the community to participate in workshops offers insight into resident and stakeholder perceptions and can provide valuable feedback throughout the entire process of establishing a regional transportation system. Open houses can provide brochures, posters and other materials to educate the public about the proposal with staff members available to answer questions and get a feel for general public support. The annual Dixie Transportation Expo is an example of a good environment in which to implement this strategy by providing information about regionalizing transit in the Dixie region.

During public workshops focus groups can be assembled. Focus groups are an important tool for acquiring feedback. A focus group consists of a group of people who are asked about their opinion or perception towards a particular idea or concept. Typically focus groups are structured as an interview with a moderator asking questions and respondents replying with feedback and opinions.

Within these workshops, participants can take part in several community activities for “visioning” that help identify perceptions regarding future growth and direction. A few of these community activities are described below:

**SWOT Analysis**

One common approach is for participants to assess the current strengths, weaknesses, obstacles and threats (“SWOT”) to their community. This is generally done with one person leading a discussion, another serving as the recorder to write down the ideas suggested and the remaining group members suggesting thoughts that fall into each of the four categories.

**Mapping Exercises**

Workshops may also provide activities with maps where attendees draw where they would like to see future roads, parks, commercial development locations, etc. This exercise is most successful when participants join around large tables that seat between six and eight persons and are given markers and pens to draw directly on maps. One map can be used to capture all comments; however, different maps for roads, for parks and recreation, for economic development, etc. can also be used.

All of the case study agencies have used this public support strategy at some point. It has perhaps most recently been used by Transfort in the process of educating the public about MAX. Vision Dixie used this strategy in combination with the website and public polling strategies in the development of their Vision scenario.
Strengths:
- Moderate coverage
- Efficient distribution of information
- Can be done in-house

Weaknesses:
- Limited coverage of transit dependent populations such as the elderly

### 5.6 iTownHall

The “iTownHall” meeting is similar in many respects to the public meetings mentioned above, with a key difference; an “iTownHall” meeting is held over the phone or some other type of electronic media. The “iTownHall” is a structured public meeting best moderated by a well-known person in the community (e.g. university president, local news anchor, etc.). The purpose of this type of strategy is present information about the specific initiative, receive and answer questions from members of the community and pose a few simple survey questions. This approach can provide some anonymity that cannot be achieved through a traditional public open house.

This type of strategy has not been formally implemented by any of the case studies, but it has been used by other transit providers (i.e. Mountain Metropolitan Transit in Colorado Springs) as a means of developing and gauging public support as they make changes to their transit system. An “iTownHall” meeting would be useful in developing consensus on a specific plan or ballot measure.

Strengths:
- Large coverage
- Some Anonymity
- Efficient distribution of information

Weaknesses:
- Requires sophisticated equipment
- May need to be contracted out

### 5.7 Application of Strategies for Developing and Gauging Public Support

Each of the strategies identified above has its benefits; however each has its shortcomings as well. In reality, there is no one-size-fits-all strategy for developing and gauging public support and a combination of these strategies should be used when evaluating the support for future transit in the Dixie region. In fact, combining these strategies can be very beneficial because the strengths of some strategies can be matched with the weaknesses of others to create a more comprehensive understanding of the overall public support for transit in the Dixie region.

The strategies above can all be used as support for public transit is developed, gauged and maintained in the Dixie region. It is important to recognize that the public support process is a continuing process that must be maintained throughout the life of a transit agency. Public support should be gauged now utilizing
some of the strategies mentioned above to evaluate the current feeling towards transit and its potential regionalization. If necessary, additional support can be developed by utilizing some of the tools mentioned in this chapter. As the existing transit system is transitioned to a more regional transit network it will be increasingly important to develop, gauge and maintain public support. Figure 5–1 presents a conceptual timeline of what public support strategies are most appropriate at various phases during the process of moving towards regionalized transit service in the Dixie region.

![Figure 5–1: Timeline for Public Support Strategies](image)

As shown in Figure 5–1, it is important to begin developing and gauging public support now, in the short-term. This process should continue until the political environment seems warm to progressing to a regional transit system. As the transition is made the application of more public support strategies will likely be necessary. Once the long-term goal is reached public support effort must continue throughout the life of the transit agency.

A critical phase is the transition period when local officials should determine the emerging level of support for transit improvements. Ideally, during this phase, the two key support categories (potential users and community advocates) should unite around a plan and work with local agencies to communicate this strategy to key policy leaders.

### 6.0 CONCLUSIONS, RECOMMENDATIONS AND POTENTIAL NEXT STEPS

The Dixie region can potentially support and would benefit from a regional transit service. No longer restricted to large urban areas, good transit service can provide important benefits to the region, including
mobility options for important segments of the population and resources that support growth and economic development. These benefits are shown by the success of transit in the similar-sized urban areas documented in the case studies. The Cache Valley Transit District provides a good model for St. George, demonstrating how transit can develop over time with community support, and how long-term governance and funding can work.

However, current financial constraints, the relatively small existing bus system and the generally low level of awareness about transit all point to a phased strategy for transit improvements. As illustrated in Figure 6–1, a set of short-term and long-term actions are recommended with public support strategies being implemented to bridge the two efforts by defining and building public support for better transit.

<table>
<thead>
<tr>
<th>Transit Service</th>
<th>Governance</th>
<th>Public Support</th>
<th>Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved service in St. George, initial service to adjacent cities on trial basis</td>
<td>Operation by City of St. George with interlocal agreements for service to other jurisdictions</td>
<td>Gauge public support with surveys and outreach to key stakeholders; build support groups; Track support for transit expansion and dedicated funding; gauge voter attitudes for funding options</td>
<td>Fully utilize current FTA funds and pursue other federal funds; secure new sources for match</td>
</tr>
<tr>
<td>Regional transit service, including service to airport and other regional destinations; possible BRT service</td>
<td>Regional transit district, established in accordance with Utah statute</td>
<td></td>
<td>Dedicated multi-jurisdiction funding for transit (Mass Transit Tax)</td>
</tr>
</tbody>
</table>

**Figure 6–1: Transit Phasing Strategy**

While short-term actions can proceed immediately, the long-term actions (creating a regional system with dedicated funding) would only proceed when public support and consensus have been reached. The recommended actions are summarized below:
Short-term

- SunTran continues operation of transit in the Dixie region
- Initiate preliminary route extensions into adjacent cities through interlocal agreements
- Begin public support process through stakeholder outreach
- Fully utilize federal funds and pursue other federal funds
- Provide sufficient matching funds through some combination of an appropriation of Existing Highway Tax, Class B & C Road Funds and/or a portion of General Sales Tax Revenues

Transition (Public Support)

- Develop and gauge public support by implementing a variety of strategies including, but not limited to, the strategies discussed in Chapter 5.0

Long-term

- Create a regional transit district similar to CVTD
- Provide regional public transportation services including service to the airport and other regional destinations
- Continue public support process through an agency website and other strategies as changes are made to the transit service
- Obtain dedicated funding by implementing the Mass Transit Local Option Tax in communities served by the regional transit district

6.1 Concept Route Illustration

Two generic route options were developed as concepts for decision makers. These concept routes were developed in coordination with SunTran and illustrate the potential service that could be provided as transit service is expanded outside the St. George municipal boundaries. These illustrations also present preliminary cost estimates and potential short-term funding sources. A list of the key assumptions that were used to develop these illustrations is presented in Appendix G. Note that these illustrations are examples only; the details of the operation and funding of a new route would need to be established through interlocal agreements with St. George.

6.1.1 Concept Service Descriptions and Cost Estimates

One option could be a fixed route extending from the SunTran’s current transfer center at 100 South 1000 East in St. George to either Santa Clara and Ivins or Washington City. This conceptual route would provide 40 minute headways and operate on the same schedule as the existing SunTran routes, Monday through Saturday, 6:00 am to 8:30 pm. The Americans with Disabilities Act (ADA) requires that communities with traditional fixed route service provide complimentary paratransit service within a three-quarter mile radius of the fixed route. Table 6–1 presents the costs associated with the conceptual traditional fixed route which include the cost of paratransit service.
### Table 6–1: Fixed Route Cost Estimate

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>Federal/Local%</th>
<th>Local Contribution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bus Cost</td>
<td>$390,000</td>
<td>80/20%</td>
<td>$78,000</td>
</tr>
<tr>
<td>Back up Vehicle</td>
<td>$85,000</td>
<td>80/20%</td>
<td>$17,000</td>
</tr>
<tr>
<td>Annual fuel costs</td>
<td>$51,000</td>
<td>50/50%</td>
<td>$25,500</td>
</tr>
<tr>
<td>Driver wage and benefits package</td>
<td>$107,000</td>
<td>50/50%</td>
<td>$53,000</td>
</tr>
<tr>
<td>Insurance and Bond increase (5%)</td>
<td>$1,000</td>
<td>50/50%</td>
<td>$500</td>
</tr>
<tr>
<td>Maintenance Costs</td>
<td>$16,000</td>
<td>80/20%</td>
<td>$3,200</td>
</tr>
<tr>
<td>Parts Costs</td>
<td>$4,000</td>
<td>80/20%</td>
<td>$800</td>
</tr>
<tr>
<td><strong>Total (Year 1)</strong></td>
<td><strong>$653,000</strong></td>
<td></td>
<td><strong>$178,000</strong></td>
</tr>
<tr>
<td><strong>Total (Year 2-6)</strong></td>
<td><strong>$178,000</strong></td>
<td></td>
<td><strong>$83,000</strong></td>
</tr>
</tbody>
</table>

The other option would be to provide service with a commuter route that would operate on one of the alignments mentioned above. However, a commuter route would only operate five times per day; twice in the morning, once at noon and twice in the evening. Complimentary paratransit service would not be required with the commuter route option. Table 6–2 presents the costs associated with the commuter route concept.

### Table 6–2: Commuter Route Cost Estimate

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>Federal/Local%</th>
<th>Local Contribution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bus Cost</td>
<td>$390,000</td>
<td>80/20%</td>
<td>$78,000</td>
</tr>
<tr>
<td>Back up Vehicle</td>
<td>$85,000</td>
<td>80/20%</td>
<td>$17,000</td>
</tr>
<tr>
<td>Annual fuel costs</td>
<td>$15,000</td>
<td>50/50%</td>
<td>$7,500</td>
</tr>
<tr>
<td>Driver wage and benefits package</td>
<td>$31,000</td>
<td>50/50%</td>
<td>$15,000</td>
</tr>
<tr>
<td>Insurance and Bond increase (5%)</td>
<td>$1,000</td>
<td>50/50%</td>
<td>$500</td>
</tr>
<tr>
<td>Maintenance Costs</td>
<td>$16,000</td>
<td>80/20%</td>
<td>$3,200</td>
</tr>
<tr>
<td>Parts Costs</td>
<td>$4,000</td>
<td>80/20%</td>
<td>$800</td>
</tr>
<tr>
<td><strong>Total (Year 1)</strong></td>
<td><strong>$541,000</strong></td>
<td></td>
<td><strong>$122,000</strong></td>
</tr>
<tr>
<td><strong>Total (Year 2-6)</strong></td>
<td><strong>$66,000</strong></td>
<td></td>
<td><strong>$27,000</strong></td>
</tr>
</tbody>
</table>

#### 6.1.2 Funding Illustration

The fixed route option would be the most expensive in terms of both capital and operational expenses. Therefore, the fixed route option was chosen to provide an illustration of the funding requirements to expand transit outside the St. George city limits into either Santa Clara and Ivins or Washington City.

**Concept Route to Santa Clara and Ivins**

To fund a fixed route to Santa Clara and Ivins the following combination of revenues would produce sufficient funds to meet the local match requirement of $178,000 in **Year 1**.

- A dedication of approximately 15% of Ivins and Santa Clara Highway Tax revenues resulting in $26,075;
• A dedication of approximately 15% of Ivins and Santa Clara Class B & C revenues resulting in $79,738; and

• A dedication of approximately 15% of Ivins and Santa Clara Sales Tax revenues resulting in $76,269.

Table 6–3: Concept Funding for Fixed Route to Santa Clara and Ivins (Year 1)

<table>
<thead>
<tr>
<th>Dedication</th>
<th>Revenues</th>
<th>Santa Clara</th>
<th>Ivins</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Highway Tax 15%</td>
<td>$10,784</td>
<td>$15,291</td>
<td>$26,075</td>
<td></td>
</tr>
<tr>
<td>Class B &amp; C Road Funds 15%</td>
<td>$35,333</td>
<td>$44,405</td>
<td>$79,738</td>
<td></td>
</tr>
<tr>
<td>Sales Tax 15%</td>
<td>$34,494</td>
<td>$41,775</td>
<td>$76,269</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td>$182,082</td>
<td></td>
</tr>
</tbody>
</table>

To fund a fixed route to Santa Clara and Ivins any of the following options would produce sufficient funds to meet the local match requirement of $83,000 in Years 2-6.

• A dedication of approximately 17% of Ivins and Santa Clara Class B & C revenues resulting in $90,370; or

• A dedication of approximately 17% of Ivins and Santa Clara Sales Tax revenues resulting in $86,438; or

• A combination of Highway Tax, Class B & C Road Funds and Sales Tax revenues from Ivins and Santa Clara as follows:

Table 6–4: Concept Funding for Fixed Route to Santa Clara and Ivins (Years 2-6)

<table>
<thead>
<tr>
<th>Dedication</th>
<th>Revenues</th>
<th>Santa Clara</th>
<th>Ivins</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Highway Tax 10%</td>
<td>$7,189</td>
<td>$10,194</td>
<td>$17,383</td>
<td></td>
</tr>
<tr>
<td>Class B &amp; C Road Funds 10%</td>
<td>$23,555</td>
<td>$29,603</td>
<td>$53,159</td>
<td></td>
</tr>
<tr>
<td>Sales Tax 5%</td>
<td>$11,498</td>
<td>$13,925</td>
<td>$25,423</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td><strong>$95,965</strong></td>
<td></td>
</tr>
</tbody>
</table>

The apportionments for Year 1 and Years 2-6 are conceptual. Other combinations of the Highway Tax, Class B & C Road Funds and Sales Tax revenues from Santa Clara and Ivins could be used as long as they meet the $178,000 and $83,000 thresholds for Year 1 and Years 2-6, respectively. Any additional service within the St. George city limits resulting from this additional route could warrant an additional funding contribution by St. George. A commuter route would cost less than the fixed route and would result in a lower percentage of contributed revenues than those outlined above.
**Concept Route to Washington**

To fund a fixed route to Washington City the following combination of revenues would produce sufficient funds to meet the local match requirement of $178,000 in **Year 1**.

- A dedication of approximately 10% of Highway Tax revenues from Washington City resulting in $81,054;
- A dedication of approximately 10% of Class B & C revenues from Washington City resulting in $69,804; **and**
- A dedication of approximately 1% of Sales Tax revenues from Washington City resulting in $30,285.

<table>
<thead>
<tr>
<th>Dedication</th>
<th>Revenues</th>
<th>Washington City</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Highway Tax</td>
<td>10%</td>
<td>$81,054</td>
<td>$81,054</td>
</tr>
<tr>
<td>Class B &amp; C Road Funds</td>
<td>10%</td>
<td>$69,804</td>
<td>$69,804</td>
</tr>
<tr>
<td>Sales Tax</td>
<td>1%</td>
<td>$30,285</td>
<td>$30,285</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td><strong>$181,143</strong></td>
</tr>
</tbody>
</table>

To fund a Fixed route to Washington **any** of the following options would produce sufficient funds to meet the local match requirement of $83,000 in **Years 2-6**.

- A dedication of approximately 11% of Washington City Highway Tax revenues resulting in $89,159; **or**
- A dedication of approximately 13% of Washington City Class B & C revenues resulting in $90,745; **or**
- A dedication of approximately 3% of Washington City Sales Tax revenues resulting in $90,855; **or**
- A combination of Highway Tax, Class B & C Road Funds and Sales Tax revenues from Washington City as follows:
Table 6–6: Concept Funding for Fixed Route to Washington (Years 2-6)

<table>
<thead>
<tr>
<th>Dedication</th>
<th>Revenues</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Washington City</td>
</tr>
<tr>
<td>Highway Tax</td>
<td>4%</td>
</tr>
<tr>
<td>Class B &amp; C Road Funds</td>
<td>4%</td>
</tr>
<tr>
<td>Sales Tax</td>
<td>1%</td>
</tr>
<tr>
<td>Total</td>
<td></td>
</tr>
</tbody>
</table>

The apportionments for Year 1 and Years 2-6 are conceptual. Other combinations of the Highway Tax, Class B & C Road Funds and Sales Tax revenues from Washington City could be used as long as they meet the $178,000 and $83,000 thresholds for Year 1 and Years 2-6, respectively. Any additional service within the St. George city limits resulting from this additional route could warrant an additional funding contribution by St. George. A commuter route would cost less than the fixed route and would result in a lower percentage of contributed revenues than those outlined above.
APPENDIX A CASE STUDIES
POCATELLO REGIONAL TRANSIT

Pocatello, Idaho

NTD ID Number: 0022
www.pocatellotransit.com

Dave Hunt (Transit Director)
(208) 234-6248
dhunt@pocatello.us
Pocatello Regional Transit

Pocatello Regional Transit (PRT) is based in Pocatello, Idaho. It is a municipal transit system that has added some regional components through interlocal agreements with rural communities. PRT is primarily funded through the city general funds of Pocatello and the other communities it serves. The following sections present more detail on PRT, its organization and operation.

Community Characteristics

The urban areas of Pocatello and Chubbuck, ID compose PRT’s primary service area, but PRT also serves rural communities in the southeastern corner of Idaho, which is Idaho Transportation Department’s (ITD) Highway District 5. The population of Pocatello increased by 5.4% from 2000 to 2010 according to the 2010 US Census. The population of Chubbuck is much lower than Pocatello but it increased by 43.5% from 2000 to 2010. According to the 2010 National Transit Database, PRT serves a total of 27 square miles with an overall population density of 2,284 persons per square mile.

Transit System Description

Within the urbanized area PRT operates a total of 5 fixed routes and paratransit year round. The total number of fixed routes increases to 10 routes during the Idaho State University (ISU) school session, including 3 ISU routes. Outside of the urbanized area PRT provides 17 demand-response routes, some of which it operates through a contract with the Cache Valley Transit District (CVTD) based in Logan, UT. In 2010, PRT operated with 53,792 vehicle service hours, 792,097 vehicle service miles and 555,550 riders. PRT has an annual operating budget of approximately $2.5 Million.

History of the Transit System

PRT began operation in 1970 and initiated its first fixed route in 1980. Its expansion has been incremental throughout its history. In 1982 PRT was eligible to receive FTA 5307 funding, which allowed further expansion of the transit system. Recently, PRT has expanded its service to rural communities in southeastern Idaho. Service to these rural communities was initiated largely because representatives from those communities approached PRT and requested service.

Public Support

Recently PRT completed a promotional campaign called “Take Your Seat.” As part of the campaign PRT distributed fliers alerting local residents to the location of the nearest bus stop. This flier also doubled as a 30 day no-fare pass on PRT buses. PRT also promotes their service through radio, newspaper and their website. They maintain the support of public officials through involvement in city councils and MPO board meetings. Additionally, PRT relies on its yearly service report to maintain public support for transit service. One unique way in which PRT markets transit service is through emphasizing the necessity of a viable transit system for LEED certifications.

Governance

PRT is a municipal transit system operated as a branch of the City of Pocatello, which allows it to minimize redundancy by drawing from many existing city services to operate. The expansion of PRT’s service area into rural communities in southeastern Idaho has been accomplished through interlocal agreements with those communities each of which last 3 years. Through these agreements PRT agrees to provide transit service to the communities and the communities agree to make contributions to fund the
service they receive. Representatives from who sit on the Metropolitan Planning Organization (MPO) policy board help make decisions regarding transit service, specifically in the areas outside Pocatello and Chubbuck with additional assistance from local mobility management networks. However, ultimately it is the Mayor and City Council of Pocatello that make decisions regarding transit service and PRT. Municipal operation and interlocal agreements have worked well for PRT and PRT does not currently have any plans to transition to a more regional governance structure, such as a transit authority.

**Funding**

The primary local funding source for PRT is the City of Pocatello general fund. The rural communities that PRT serves also contribute funding according to their interlocal agreements, which insure that those who receive transit service also pay for it. These communities typically contribute monies from their city general funds as well. Additionally, PRT has a contract with Medicaid that provides less than 10% of the funding in the urban area, but approximately 45% in the rural areas.

PRT’s Medicaid contract was initialized approximately 20 years ago when Idaho Medicaid requested that PRT provide service to Medicaid clients within PRT’s service area. PRT is not the sole recipient of Medicaid funding in Pocatello and there are other smaller, local service providers that also receive Medicaid funds for the service they provide. In Idaho, Medicaid funds are managed by a brokerage called American Medical Response (AMR). AMR issues contracts to transit service providers who are least expensive and most appropriate for serving the needs of Medicaid clients. PRT uses Medicaid funds for both fixed and demand-response routes. Because Medicaid funds are non-FTA and non-DOT funds, they can be used to match FTA funds. PRT also receives approximately $130,000 in fare box revenues and $60,000 from ISU, which it reports as state funds in the NTD.

For operations in 2010, PRT used approximately $760,000 in FTA 5307 funding, $120,000 in FTA 5309 stimulus funding and $590,000 in FTA 5311 funding. Pocatello receives FTA 5307 funds directly while FTA 5311 funds are distributed by ITD. Federal funds for operation were matched with approximately $260,000 in local funds and approximately $580,000 in other funds, which includes the Medicaid funding. For capital expenditures in 2010 PRT used approximately $820,000 in FTA 5307 funds, $1,000,000 in FTA 5309 stimulus funding and $60,000 in FTA 5311 funds. These funds were matched with approximately $210,000 in local funds.

**Relevance**

PRT is similar to SunTran in terms of governance structure. Both are municipal systems and are funded primarily through city general funds. However, PRT has expanded its service through the use of interlocal agreements which allow it to provide transit service to areas outside the Pocatello/Chubbuck urbanized area. PRT has found this type of governance to be effective and beneficial in terms of minimizing redundancy by utilizing existing city services to operate its transit service. A similar approach could be taken in the St. George area by utilizing interlocal agreements to extend transit service to nearby communities.

The use of alternative funding sources, such as its Medicaid contract and university contributions, has allowed PRT to effectively leverage federal funds. PRT has also been able to take advantage of FTA transit programs beyond 5307 including 5309 and 5311. Maximizing the use of federal funds can be very beneficial in expanding a transit service area.
MISSOULA URBAN TRANSPORTATION DISTRICT

Missoula, Montana

NTD ID Number: 8009
www.mountainline.com

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Missoula Urban Transportation District

The Missoula Urban Transit District (MUTD) is based in Missoula, Montana. It is a special service district created through Montana legislation. MUTD is funded primarily through a district wide property tax. The following sections present more detail on MUTD, its organization and operation.

Community Characteristics

MUTD’s service area encompasses Missoula, MT and surrounding areas. However, the majority of its service is focused within the Missoula city limits. The population of the Missoula has increased by 17.1% since the 2000 US Census. According to the 2010 NTD, MUTD serves an area of 70 square miles with an overall population density of 1,000 persons per square mile.

Transit System Description

The transit system operated by the MUTD is called Mountain Line. Mountain Line operates 12 fixed routes and paratransit. Mountain Line owns and operates all buses used for this service. Ridership on Mountain Line has been strong with 812,955 riders in 2010. During 2010, Mountain Line operated with 53,325 vehicle service hours and 729,171 vehicle service miles. Mountain Line’s operating budget for 2010 was approximately $3.8 Million.

History of the Transit System

MUTD was created in 1976 and began operating Mountain Line in 1977. Initially Mountain Line operated through contracted service, but transitioned to local management in 1996. Since its initiation Mountain Line has expanded its service area through annexations into MUTD. In 2011, Mountain Line added free Wi-Fi service to its buses and also began providing real-time bus information to transit patrons.

Public Support

Mountain Line has found that in Missoula there seems to be a natural public interest in transit. Mountain Line maintains that interest through weekly news releases. Additionally, Mountain Line has gauged public support and gathered public comments through an online survey as well as through public workshops. Mountain Line’s website is well maintained and provides information to the public regarding the status of transit service and general route information.

Governance

MUTD was created by a public vote in 1976 through existing legislation. The special service district legislation in Montana, though which MUTD was created, made MUTD a completely independent entity including providing it with taxing authority. Much of MUTD’s operation is coordinated with the local MPO, but decisions in the MUTD are made by a 7 member board of directors, which is made up of officials appointed by the City of Missoula and Missoula County. This enables those who receive transit service make decisions regarding the service they receive. Board members are appointed for a term of 4 years. This board of directors has chosen to focus transit on Missoula’s internal system rather than expand it into neighboring communities.
Funding

The vote that created MUTD in 1976 also included a vote for a district wide property tax. Whenever a new area is annexed into MUTD the property tax is imposed on that area. This insures that those who receive transit service also pay for it. The property tax collected by MUTD provides most of the local funding for Mountain Line and accounts for roughly half of the total operating budget. Mountain Line receives approximately $570,000 in fare box revenues. Additional revenues are received from the University of Montana, which contributes approximately $170,000 per year in exchange for free fares for its students.

MUTD used approximately $1,310,000 in FTA 5307 funds for operations in 2010. Additionally, MUTD received some FTA 5311 funds, approximately $160,000 in FTA 3516 JARC funds and $60,000 in FTA 5317 New Freedom funds for operations. These funds were matched with approximately $1,560,000 in state and local funds. For capital expenditures MUTD also used approximately $250,000 in FTA 5307 funds. It also used approximately $80,000 on planning expenses.

Relevance

MUTD provides valuable insights into both governance and funding. The Utah version of a special service district that is devoted to transit is a transit authority and MUTD demonstrates how a governance structure of this type can be beneficial to transit operation. MUTD’s governance structure allows alignment of governance and funding. Those who receive transit service both make decisions and pay for the service. The special service district governance structure allows areas to be annexed into the district instead of using separate interlocal agreements for each entity that wants transit service.

Because MUTD is an independent entity with taxing authority it can receive funding directly instead of relying on contributions from other entities. MUTD also shows how non-traditional funding sources, such as a property tax, could be used to match federal funds. MUTD further shows how an agreement could be reached with a local organization such as a university to generate more funding for transit service. The variety of FTA funding sources used by MUTD for both operations and capital expenses demonstrates the benefit of taking advantage of the many federal programs that are available.
TRANSFORT

Fort Collins, Colorado

NTD ID Number: 8011
www.fcgov.com/transfort

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Transfort

Transfort is based in Fort Collins, Colorado. It is a municipal transit system that has used interlocal agreements to create regional components including a regional commuter route that connects to a larger transit system. Primary funding for Transfort comes through Fort Collins’ city general fund as well as the general funds of the other areas it serves. The following sections present more detail on Transfort, its organization and operation.

Community Characteristics

Transfort primarily serves Fort Collins, CO. According to the 2010 US Census the population of Fort Collins has increased by 21.4% since 2000. The NTD indicates that Transfort has a total service area of 47 square miles, which has a population density of 2,525 persons per square mile.

Transit System Description

Although in a general sense Transfort only serves Fort Collins, Transfort does provide some service to nearby communities. In 2011, in cooperation with the City of Loveland Transit (COLT), Transfort implemented a regional route called FLEX that provides a connection through northern Colorado to Longmont. This connection to Longmont provides a connection to other transit routes, operated by the Regional Transportation District (RTD), that continue on into Denver. FLEX is currently a pilot route that will continue through 2012 and possibly 2013. Transfort is currently in the final design stages of Colorado’s first BRT route called MAX, which will travel along a five mile corridor through downtown Fort Collins. MAX will provide enhanced transit service by emphasizing speed and convenience. Along with the new BRT route Transfort also plans to construct a new transit center, which will provide a Park-n-Ride as well as other amenities.

Transfort operates a total of 19 fixed routes and paratransit. Transfort operates the fixed routes and contracts out the paratransit. Ridership on Transfort was 2,074,580 riders in 2010. During 2010, Transfort operated with 101,523 vehicle service hours and 1,159,068 vehicle service miles. Transfort’s total operating budget for 2010 was approximately $8.0 Million.

History of the Transit System

Transfort began in 1974 with 4 circulator buses. In 1975, it expanded service to include Colorado State University. Through the 1980’s and 1990’s Transfort grew slowly and has expanded service outside Fort Collins through interlocal agreements. Transfort’s first major regional route, FLEX, began in 2011. MAX BRT service is scheduled to begin in 2014.

Public Support

Transfort provides a lot of public information through its website, which is part of the City of Fort Collins website. The information provided on the website includes video feeds to educate the public as well as posted updates. During the planning and design process for MAX, Transfort has held regular public involvement meetings, which have been announced on Transfort’s website and through fliers delivered to citizens along the proposed corridor. Transfort has also built the support of local socioeconomic organizations through specialized presentations. Fort Collins’ Downtown Development Authority has also been a valuable partner in building public support for MAX.
Governance

Transfort is a municipal system, but has used interlocal agreements to expand its service area beyond Fort Collins. Through these agreements surrounding communities purchase transit service from Fort Collins. Thus those who receive transit service also pay for it. Specifically, the regional route, FLEX, is operated by Transfort through interlocal agreements with Loveland and Lambert County. As Transfort has expanded its service outside the city it has found difficulties in operating a regional system as a branch of the city especially when managing multiple interlocal agreements. Presently Transfort is in the process of reevaluating its governance strategy. By changing governance strategies Transfort hopes to simplify future expansion of transit service.

Funding

The primary local funding source for Transfort is the City of Fort Collins city general fund, which is funded through a 0.85% sales tax. Minor funding sources include advertising, service agreements with Colorado State University, and grants from local philanthropies. Services outside Fort Collins are funded through contributions from the individual communities being served through interlocal agreements with Fort Collins. Capital funding for MAX will be provided by FTA, the Colorado Department of Transportation, the Downtown Development Authority, CSU and the City of Fort Collins.

Through 2010 fare box revenues Transfort recovered approximately $1,070,000 in operational expenses. Transfort used approximately $350,000 in FTA 5307 funds for operations in 2010. In 2010, Transfort also received approximately $30,000 in FTA 5316 JARC funds for operations, which are distributed by the Colorado Department of Transportation. Additionally, Transfort received approximately $360,000 through a CMAQ grant for the operation of FLEX. These funds were matched with approximately $5,880,000 in local funds and $300,000 in other funds not specified in the NTD. Transfort used approximately $340,000 in FTA 5307 funds and $1,590,000 in FTA 5307 stimulus funds for capital projects. These federal monies were not matched with any local funds.

Relevance

Transfort serves a much larger population than a regional system in St. George would likely serve, but many of their lessons for expanding a municipal transit system to a regional transit system are still applicable. For example, Transfort demonstrates the potential use of interlocal agreements to expand service outside of the city without creating a new transit organization. Transfort further demonstrates the importance of monitoring the effectiveness of an existing governance strategy and the potential need to change that governance strategy as the system expands. Transfort also demonstrates the possibility of contracting out some service elements as necessary or desired. The use of federal funds can be an important resource in expanding transit service and Transfort has utilized a variety of funding sources.
CACHE VALLEY TRANSIT DISTRICT

Logan, Utah

NTD ID Number: 8028
www.cvtdbus.org

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Cache Valley Transit District

The Cache Valley Transit District (CVTD) is based in Logan, Utah. CVTD is a special service district created through Utah legislation. It is funded primarily through a dedicated sales tax assessed of all member agencies in the district. The following sections present more detail on CVTD, its organization and operation.

Community Characteristics

Cache Valley Transit District (CVTD) serves Logan, UT and the surrounding communities. According to the 2010 US Census the growth in the communities served by CVTD ranges from 12.9%, in Logan, to 165.9%, in Nibley. Generally, more growth has occurred in the smaller communities resulting in a weighted average growth of 31.3% in the CVTD service area. According to the 2010 NTD CVTD serves 33 square miles with a population density of 2,424 persons per square mile.

Transit System Description

CVTD operates a total of 13 fixed routes and paratransit within its service area. CVTD owns and operates its own buses and, through a contract with PRT, also operates demand-response service to Preston and Franklin, ID. In 2010 CVTD had 1,925,316 riders. CVTD operated with 62,464 vehicle service miles and 921,571 vehicle service hours during 2010. CVTD operates fare-free with a 2010 operating budget of approximately $4.2 Million.

History of the Transit System

Logan Transit District (LTD) preceded the creation of CVTD and began providing service to Logan in 1990. LTD began as a fare-free transit system only serving Logan. Citizens of the surrounding communities wanted transit like Logan and, in 2001, CVTD was established by local officials to serve the outlying communities. A dedicated transit tax was approved by voters at the same time. CVTD operated by contracting service through LTD until 2007 when it annexed LTD. When it first began CVTD contracted service with a private contractor which allowed it to grow and gain experience as a transit operator. After CVTD had built its own expertise it assumed operation of its own system in 2009. As LTD had been when it began, CVTD continues operation as a fare-free system.

Public Support

When LTD was first established in 1990, it was established as a fare-free system in part to show ridership and to demonstrate the benefits of transit service. Not only were citizens of Logan able to see the benefits of a transit system, but citizens of surrounding communities were able to see the benefits as well. This sparked the interest of surrounding communities and led to the creation of CVTD.

CVTD has a well-maintained website that provides information to the public about the transit system including route updates and new releases. CVTD also uses their website to collect public comments. When building support for their transit system CVTD has found it is important to be open with the public in showing them what they will get for their investment. This includes politicians as well. One way that CVTD has accomplished this is through presenting informational DVDs to elected officials. These DVDs have included information about the system and in some cases presented videos of the buses being used. CVTD also produces monthly reports. CVTD has also found that finding a local official who will give their full support to transit helps propel the system forward. A challenge that CVTD has faced is educating the
legislature on the difference between a large transit system, such as UTA, and a smaller transit system serving a population under 200,000.

**Governance**

CVTD was established through the same legislation as the Utah Transit Authority (UTA), which is Utah Code §17B-2a. As a special service district in the State of Utah, CVTD has taxing authority with voter approval. It is also completely independent of all the communities it serves. CVTD provides input to the communities it serves in transit planning efforts and also coordinates planning with the local MPO. CVTD is governed by a board made of up of citizens of each county or city incorporated into the district who are appointed by local officials. The board is composed of one board member per 200 service miles. Communities with less than 200 service miles have combined votes.

**Funding**

A 0.30% sales tax was passed at the same time CVTD was created in 2001. This tax is completely devoted to transit and is the major local funding source for CVTD. Because CVTD is a transit authority revenues from the tax are passed directly to CVTD without ever entering the general funds of the communities served by CVTD. CVTD is a fare-free system and as such does not receive any additional revenues through fares. Additional local revenues are received from local businesses and advertising. CVTD also receives funds from PRT for the service it provides to Preston and Franklin.

In 2010 CVTD used approximately $1,260,000 in FTA 5307 funds for operations. Additionally, CVTD received approximately $350,000 in FTA 5311 funds. These funds were matched with approximately $2,480,000 in local funds and $100,000 in other funds. For capital expenditures, CVTD used approximately $2,580,000 in FTA 5307 funds, $1,250,000 in FTA 5307 stimulus funds and $1,060,000 in FTA 5311 stimulus funds. These funds were all matched with approximately $690,000 in local funds.

**Relevance**

Evaluation of CVTD can provide many valuable insights into how the transit system in St. George might expand and what the end goal might be. If a transit district were established in St. George to help meet the regional transit needs for the area, it would likely follow the same legislation used by CVTD and UTA. As such CVTD can be a good example to follow as the process of creating a regional transit system is continued. For example, legislation for dedicated funding for transit was passed at the same time as CVTD was created, which emphasizes the importance of having a dedicated funding source when creating a transit authority.

CVTD also demonstrates how a private contractor can be used to initiate a system and also provide some expertise that may not be present internally when a regional transit system is established. Additionally, CVTD has had success operating as a fare-free system due largely to the sales tax that is devoted to transit. A similar tax could be passed in St. George and become the sole funding source for transit.
MERCED COUNTY TRANSIT

Merced, California

NTD ID Number: 9173
www.mercedthebus.com

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Merced County Transit

Merced County Transit is based in Merced, California. It is a joint powers authority that was created through an agreement of local agencies, including the City of Merced, the County of Merced and other smaller cities. The primarily funding for Merced County Transit is through the state transportation fund in California. The following sections present more detail on Merced County Transit, including its organization and operation.

Community Characteristics

Merced County Transit serves Merced County in California. Merced County is unique in that the center of the county is mainly agricultural with limited roadway connections from east to west. Nevertheless, Merced County transit provides service to both rural and urbanized areas throughout the county. Merced County Transit also serves the City of Turlock in Stanislaus County, CA. According to the 2010 NTD Merced County Transit has a service area of 30 square miles with a population density of 4,000 persons per square mile. Merced County has experienced 21.5% population growth since the 2000 US Census.

Transit System Description

Merced County Transit (known as The Bus) operates 27 fixed routes, 26 demand-response routes, and paratransit throughout Merced County. Ten of the demand-response routes are specifically carless commute service. Merced County Transit also operates a route to/from Turlock. All of Merced County Transit’s buses are operated by a private contractor. During 2010 Merced County Transit operated with 114,218 vehicle service hours and 1,905,171 vehicle service miles generating a ridership of 973,066. Merced County Transit’s operating budget in 2010 was approximately $9.8 Million. Around half of Merced County Transit’s operating budget goes to the contractor.

History of the Transit System

Prior to the creation of the joint powers authority (JPA), separate transit services where provided by the County and the City of Merced. In some cases there was even an overlap in transit service. Additionally, some of the smaller communities also had transit service. In 1996, the JPA was created to consolidate transit service in Merced County. The overall service area of Merced County Transit has not changed much since its conception.

When it was initially created Merced County Transit was managed by county employees; however in 2010 the 3 county employees who managed Merced County Transit became solely employees of the JPA. Merced County Transit has had several contractors throughout its history, but its buses are currently operated by a private company called Merced Transportation.

Public Support

A study was completed prior to the creation of Merced County Transit, which analyzed the benefits of transit system consolidation. That study was used to demonstrate the need for consolidation of transit service through public workshops. There wasn’t much resistance when the JPA was created because the study showed that consolidation would reduce redundancy and more efficiently use public funds.

Merced County Transit continues to enjoy good public support. This continued support is maintained in part through presentations to city councils and participation in meetings of the Merced County Association
of Governments (MCAG), the MPO for Merced County. Merced County Transit also has a well-maintained website which provides information to transit patrons about the transit system including route updates.

**Governance**

Merced County Transit operates as a JPA, which is created through several interlocal agreements. As such Merced County Transit is separate from all the agencies that it serves. Merced County Transit is governed by a board of 11 members, which also serves as the board for MCAG. Having both boards composed of the same members has posed some concerns with oversight of federal monies; nevertheless Merced County Transit continues its governance in this way. In some ways operating as a JPA is analogous to operating as a municipal system, with the board of directors acting as the city council, and eliminates some redundancy by consolidating services.

**Funding**

The communities served by Merced County Transit do not contribute local funds, but they make contributions from their apportionment of the California state-wide local transportation fund (LTF), which is a 0.25% sales tax. In California LTF monies must be used for transit unless a community can show they have no unmet transit needs, in which case LTF monies may be used for roadway improvements. Merced County Transit also receives some revenues from the University of California, Merced.

Merced County Transit receives federal funds through MCAG. In 2010, Merced County Transit used approximately $2,910,000 in FTA 5307 funds for operations. Contributions from the City of Turlock account for some of these FTA 5307 funds. Additionally, Merced County Transit received approximately $150,000 in FTA 5307 stimulus funds and $410,000 in FTA 5311 funds. These federal funds were matched with approximately $4,840,000 in state funds. In 2010, Merced County Transit also generated approximately $1,440,000 in fare box revenues. For capital expenditures in 2010, Merced County Transit used approximately $660,000 in FTA 5307 funds which it matched with $440,000 in state funds.

**Relevance**

The state LTF funds available in California provide a good source for a local match of federal funds. However, Utah does not have a state-wide funding source. Nevertheless, some insights can be gained from Merced County Transit in terms of funding as well as governance and public support. Although state-wide funding is not available in Utah having a dedicated tax has allowed Merced County Transit to maintain operations throughout its history and a local tax dedicated to transit could provide similar benefit in St. George.

Merced County Transit demonstrates the potential to create a separate entity through interlocal agreements, called a joint powers authority in California and an interlocal entity in Utah. This organizational structure allows Merced County Transit to operate efficiently. Many of the redundancies of a larger transit organization are eliminated or at least minimized through Merced County Transit’s cooperation with MCAG, such as having joint board members. Merced County Transit also minimizes its staffing needs through contracting with a private contractor. However, Merced County Transit does not have taxing authority and must rely on the contributions of the agencies it serves. Furthermore, it does not have the ability to receive federal funds directly.
NORTHERN ARIZONA PUBLIC TRANSPORTATION AUTHORITY

Flagstaff, Arizona

NTD ID Number: 9219
www.naipta.az.gov

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Northern Arizona Public Transit Authority

Northern Arizona Public Transit Authority (NAIPTA) is based in Flagstaff, Arizona. NAIPTA is a transit authority contracted by one urban and two rural areas in northern Arizona to provided transit service. Funding sources for NAIPTA include dedicated transit funds and city general funds depending on the community purchasing the service. The following sections present more detail on NAIPTA, its organization and operation.

Community Characteristics

NAIPTA consists of three service areas in northern Arizona: Flagstaff, Cottonwood and Sedona. According to the 2010 US Census the population of Flagstaff has growth by 24.5% and Cottonwood has grown by 22.7% since 2000. The population of Sedona has decreased by 1.6% during the same time frame. The weighted average population growth of these three service areas combined is 21.3% from 2000 to 2010. Some transit service in these areas overlaps into the surrounding counties of Coconino and Yavapai. According to the 2010 NTD, NAIPTA has a service area of 65 square miles with a population density of 1,328 persons per square mile.

Transit System Description

NAIPTA has sole authority over transit in northern Arizona and operates a total of 15 routes in its three service areas. All but four of these routes are in Flagstaff. NAIPTA also operates paratransit in each service area. In Flagstaff, NAIPTA operates three transit brands: Mountain Line, a fixed route service; Mountain Lift, a paratransit service; and Mountain Link, a bus rapid transit (BRT) route. The transit service in Cottonwood is called Cottonwood Area Transit (CAT). Transit service in Sedona is a commuter route to/from Cottonwood and is called Verde Lynx. NAIPTA owns and operates all the buses serving these communities.

During 2010, NAIPTA operated with a total of 55,649 vehicle service hours and 738,937 vehicle service miles over its three service areas. The total 2010 ridership for the combined NAIPTA system was 1,142,548 riders. The overall operating budget for NAIPTA in 2010 was approximately $4.9 Million. Mountain Link did not begin service until August 29, 2011 and its ridership and operation is not reflected in these numbers. However, NAIPTA indicated that since its initiation, Mountain Link ridership has surpassed the ridership of all the other services in Flagstaff combined.

History of the Transit System

Pine Country Transit was the first transit service provider in Flagstaff. It began in the 1970’s and was the predecessor to Mountain Line. Mountain Line took over transit service in Flagstaff in 2001. This service, as well as transit service in Sedona, was operated and managed as a branch of Coconino County prior to NAIPTA’s assumption of transit operation in 2007. Cottonwood also had some transit service prior to NAIPTA. NAIPTA was formed through special legislation in 2006 but didn’t begin operating transit service until 2007. Flagstaff, Cottonwood and Sedona now contract with NAIPTA to provide transit service in their respective communities. Each service area maintains its own brand and NAIPTA operates behind the scenes.

Public Support

NAIPTA was established following petitions from local officials to create a transit organization and was created by a vote from the boards of directors of Coconino and Yavapai Counties. As transit service has
grown in Flagstaff, NAIPTA has needed additional funding. In 2006 Flagstaff proposed a tax increase which was denied at the ballot. Beginning in 2008 Flagstaff and NAIPTA initiated a larger public education process and were able to pass the tax increase from 0.175% to 0.29% in 2010. To pass the tax in 2010 Flagstaff was very specific, even on the ballot, identifying five categories in which the funds would be used for in funding public transit. The resulting tax is separated into categories for which it can be used.

NAIPTA has a well-maintained website with links to each of the brands it operates. The each brand website is fairly user friendly and allows transit patrons to access route information and updates.

Governance

NAIPTA required special legislation because of its multi-county nature, but is essentially a transit authority. As such it is separate from all the communities it serves. Decisions regarding NAIPTA itself are made by a board of directors composed on officials from each partnering agency, which includes Flagstaff, Cottonwood, Sedona, Yavapai County, Coconino County and Northern Arizona University. A technical advisory committee also provides direction for NAIPTA and consists of a city or county manager from each agency. Decisions regarding the amount of service provided in each community are made by the individual communities. If a community wants more service they can contract for more service from NAIPTA. This provides a balance of local and regional decision making and allows those who receive the transit service to also make decisions regarding the service. Members of NAIPTA also sit on MPO boards.

Funding

The contracts NAIPTA holds with Flagstaff, Cottonwood and Sedona provide funding for NAIPTA. Flagstaff funds its transit service contract through a 0.29% dedicated transit tax. Cottonwood and Sedona fund their transit service through their city general funds.

NAIPTA receives FTA 5307 funds directly and other funds through the Arizona Department of Transportation. In 2010, NAIPTA used approximately $730,000 in FTA 5307 funds for operations. NAIPTA also received $130,000 in FTA 5307 stimulus funds, $79,000 in FTA 5311 funds and $80,000 in FTA 5317 New Freedom funds. NAIPTA matched these federal funds with approximately $3,000,000 in local funds and $20,000 in state funds. For capital expenditures NAIPTA received approximately $570,000 in FTA 5307 funds and $750,000 in FTA 5307 stimulus funds. These federal funds were matched with approximately $280,000 in local funds.

Relevance

NAIPTA has a unique and complex governance structure; nevertheless it provides valuable insights into governance, public support and regional transit operations. The governance strategy employed by NAIPTA has allowed existing transit services to maintain their local identity as transit providers, however, more applicable to St. George is the fact that this type of governance provides a balance between regional oversight and local decision making. Furthermore, it allows the partnering agencies to purchase the amount of transit they want without obligation. However, from the standpoint of the transit service provider, this equates to an inconsistent funding source.

As NAIPTA learned through the failure to pass a tax increase in 2006, it is important to educate the public when seeking to pass a new tax. It is particularly important to make sure the public knows what their investment will be used for. Generally it is better to keep language on the ballot broad, but building up to the vote the public needs to know what is coming.
NAIPTA provides a diversity of service from rural to BRT. This diversity can be important when expanding to a regional transit system and meeting the needs of the communities being served. St. George would likely require a diverse transit system because of the varying needs of the area.
# APPENDIX B  LOCAL MASS TRANSIT & ADDITIONAL MASS TRANSIT ALTERNATIVES

## Scenario 1: Local Mass Transit Tax 0.02%

<table>
<thead>
<tr>
<th>Hurricane</th>
<th>Ivins</th>
<th>Santa Clara</th>
<th>St. George</th>
<th>Washington City</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011 Tax Rates</td>
<td>6.25%</td>
<td>6.25%</td>
<td>6.25%</td>
<td>6.25%</td>
<td>6.25%</td>
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<tr>
<td>2011 Taxable Value Data</td>
<td>$793,735,666</td>
<td>$528,386,339</td>
<td>$254,745,440</td>
<td>$4,722,756,033</td>
<td>$1,093,579,372</td>
</tr>
<tr>
<td>2010 Taxable Sales</td>
<td>$157,521,455</td>
<td>$22,279,849</td>
<td>$18,396,840</td>
<td>$1,393,690,095</td>
<td>$242,280,151</td>
</tr>
<tr>
<td>Zip Code</td>
<td>84737</td>
<td>84738</td>
<td>84765</td>
<td>84770/84790</td>
<td>84780</td>
</tr>
</tbody>
</table>

- **Revenue from Mass Transit Tax**: $31,504.29
- **Revenue from Additional Mass Transit Tax**: $0.00

**Total Potential New Revenues**: $31,504.29
**Potential New Rate**: 6.27%

**Assumptions**
- Local Mass Transit Tax: 0.02%
- Additional Mass Transit Tax

**Total Tax**: 0.02%

## Scenario 2: Local Mass Transit Tax 0.1%

<table>
<thead>
<tr>
<th>Hurricane</th>
<th>Ivins</th>
<th>Santa Clara</th>
<th>St. George</th>
<th>Washington City</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011 Tax Rates</td>
<td>6.25%</td>
<td>6.25%</td>
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<td>84738</td>
<td>84765</td>
<td>84770/84790</td>
<td>84780</td>
</tr>
</tbody>
</table>

- **Revenue from Mass Transit Tax**: $157,521.46
- **Revenue from Additional Mass Transit Tax**: $0.00

**Total Potential New Revenues**: $157,521.46
**Potential New Rate**: 6.35%

**Assumptions**
- Local Mass Transit Tax: 0.10%
- Additional Mass Transit Tax

**Total Tax**: 0.10%
### Scenario 3: Local Mass Transit Tax 0.2%

<table>
<thead>
<tr>
<th>Zip Code</th>
<th>Hurricane</th>
<th>Ivins</th>
<th>Santa Clara</th>
<th>St. George</th>
<th>Washington City</th>
<th>Total</th>
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<tbody>
<tr>
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</tbody>
</table>

#### 2011 Taxable Value Data
- Hurricane: $793,735,666
- Ivins: $528,386,339
- Santa Clara: $254,745,440
- St. George: $4,722,756,033
- Washington City: $1,093,579,372
- Total: $7,393,202,850

#### 2010 Taxable Sales
- Hurricane: $157,521,455
- Ivins: $22,279,849
- Santa Clara: $18,396,840
- St. George: $1,393,690,095
- Washington City: $242,280,151
- Total: $1,834,168,390

#### Revenue from Mass Transit Tax
- Hurricane: $315,042.91
- Ivins: $44,559.70
- Santa Clara: $36,793.68
- St. George: $2,787,380.19
- Washington City: $484,560.30
- Total: $3,668,336.78

#### Total Potential New Revenues
- Hurricane: $315,042.91
- Ivins: $44,559.70
- Santa Clara: $36,793.68
- St. George: $2,787,380.19
- Washington City: $484,560.30
- Total: $3,668,336.78

#### Potential New Rate
- Hurricane: 6.45%
- Ivins: 6.45%
- Santa Clara: 6.45%
- St. George: 6.45%
- Washington City: 6.45%

#### Assumptions
- Local Mass Transit Tax: 0.20%
- Additional Mass Transit Tax: 0.00%

### Scenario 4: Local Mass Transit Tax 0.3%

<table>
<thead>
<tr>
<th>Zip Code</th>
<th>Hurricane</th>
<th>Ivins</th>
<th>Santa Clara</th>
<th>St. George</th>
<th>Washington City</th>
<th>Total</th>
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</thead>
<tbody>
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</tbody>
</table>

#### 2011 Taxable Value Data
- Hurricane: $793,735,666
- Ivins: $528,386,339
- Santa Clara: $254,745,440
- St. George: $4,722,756,033
- Washington City: $1,093,579,372
- Total: $7,393,202,850

#### 2010 Taxable Sales
- Hurricane: $157,521,455
- Ivins: $22,279,849
- Santa Clara: $18,396,840
- St. George: $1,393,690,095
- Washington City: $242,280,151
- Total: $1,834,168,390

#### Revenue from Mass Transit Tax
- Hurricane: $472,564.37
- Ivins: $66,839.55
- Santa Clara: $55,190.52
- St. George: $4,181,070.29
- Washington City: $726,840.45
- Total: $5,502,505.17

#### Total Potential New Revenues
- Hurricane: $472,564.37
- Ivins: $66,839.55
- Santa Clara: $55,190.52
- St. George: $4,181,070.29
- Washington City: $726,840.45
- Total: $5,502,505.17

#### Potential New Rate
- Hurricane: 6.55%
- Ivins: 6.55%
- Santa Clara: 6.55%
- St. George: 6.55%
- Washington City: 6.55%

#### Assumptions
- Local Mass Transit Tax: 0.30%
- Additional Mass Transit Tax: 0.00%

### Total Tax
- Hurricane: 0.20%
- Ivins: 0.00%
- Santa Clara: 0.00%
- St. George: 0.00%
- Washington City: 0.00%
- Total: 0.20%
### Scenario 5: Local Mass Transit Tax 0.3%, Additional Mass Transit Tax 0.1%

<table>
<thead>
<tr>
<th></th>
<th>Hurricane</th>
<th>Ivins</th>
<th>Santa Clara</th>
<th>St. George</th>
<th>Washington City</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>2011 Tax Rates</strong></td>
<td>6.25%</td>
<td>6.25%</td>
<td>6.25%</td>
<td>6.25%</td>
<td>6.25%</td>
<td>6.25%</td>
</tr>
<tr>
<td><strong>2011 Taxable Value Data</strong></td>
<td>$793,735,666</td>
<td>$528,386,339</td>
<td>$254,745,440</td>
<td>$4,722,756,033</td>
<td>$1,093,579,372</td>
<td>$7,393,202,850</td>
</tr>
<tr>
<td><strong>2010 Taxable Sales</strong></td>
<td>$157,521,455</td>
<td>$22,279,849</td>
<td>$18,396,840</td>
<td>$1,393,690,095</td>
<td>$242,280,151</td>
<td>$1,834,168,390</td>
</tr>
<tr>
<td><strong>Zip Code</strong></td>
<td>84737</td>
<td>84738</td>
<td>84765</td>
<td>84770/84790</td>
<td>84780</td>
<td></td>
</tr>
<tr>
<td><strong>Revenue from Mass Transit Tax</strong></td>
<td>$472,564.37</td>
<td>$66,839.55</td>
<td>$55,190.52</td>
<td>$4,181,070.29</td>
<td>$726,840.45</td>
<td>$5,502,505.17</td>
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<tr>
<td><strong>Revenue from Additional Mass Transit Tax</strong></td>
<td>$157,521.46</td>
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<td><strong>Total Potential New Revenues</strong></td>
<td>$630,085.82</td>
<td>$89,119.40</td>
<td>$73,587.36</td>
<td>$5,574,760.38</td>
<td>$969,120.60</td>
<td>$7,336,673.56</td>
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<tr>
<td><strong>Potential New Rate</strong></td>
<td>6.65%</td>
<td>6.65%</td>
<td>6.65%</td>
<td>6.65%</td>
<td>6.65%</td>
<td>6.65%</td>
</tr>
</tbody>
</table>

**Assumptions**
- Local Mass Transit Tax 0.30%
- Additional Mass Transit Tax 0.10%
- Total Tax 0.40%

### Scenario 6: Local Mass Transit Tax 0.3%, Additional Mass Transit Tax 0.2%

<table>
<thead>
<tr>
<th></th>
<th>Hurricane</th>
<th>Ivins</th>
<th>Santa Clara</th>
<th>St. George</th>
<th>Washington City</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>2011 Tax Rates</strong></td>
<td>6.25%</td>
<td>6.25%</td>
<td>6.25%</td>
<td>6.25%</td>
<td>6.25%</td>
<td>6.25%</td>
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<tr>
<td><strong>2011 Taxable Value Data</strong></td>
<td>$793,735,666</td>
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<td>$1,393,690,095</td>
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<td>$1,834,168,390</td>
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<td><strong>Zip Code</strong></td>
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<td>84738</td>
<td>84765</td>
<td>84770/84790</td>
<td>84780</td>
<td></td>
</tr>
<tr>
<td><strong>Revenue from Mass Transit Tax</strong></td>
<td>$472,564.37</td>
<td>$66,839.55</td>
<td>$55,190.52</td>
<td>$4,181,070.29</td>
<td>$726,840.45</td>
<td>$5,502,505.17</td>
</tr>
<tr>
<td><strong>Revenue from Additional Mass Transit Tax</strong></td>
<td>$315,042.91</td>
<td>$44,559.70</td>
<td>$36,793.68</td>
<td>$2,787,380.19</td>
<td>$484,560.30</td>
<td>$3,668,336.78</td>
</tr>
<tr>
<td><strong>Total Potential New Revenues</strong></td>
<td>$787,607.28</td>
<td>$111,399.25</td>
<td>$91,984.20</td>
<td>$6,968,450.48</td>
<td>$1,211,400.76</td>
<td>$9,170,841.95</td>
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<tr>
<td><strong>Potential New Rate</strong></td>
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<td>6.75%</td>
<td>6.75%</td>
<td>6.75%</td>
<td>6.75%</td>
<td>6.75%</td>
</tr>
</tbody>
</table>

**Assumptions**
- Local Mass Transit Tax 0.30%
- Additional Mass Transit Tax 0.20%
- Total Tax 0.50%
### Scenario 1: 10% of Annual Road Fund Receipts

<table>
<thead>
<tr>
<th></th>
<th>(July-Aug)</th>
<th>(Sept - Oct)</th>
<th>(Nov - Dec)</th>
<th>(Jan - Feb)</th>
<th>(Mar - April)</th>
<th>(May - June)</th>
<th>Total For Year (FY 2011)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hurricane</td>
<td>76,184.81</td>
<td>95,040.66</td>
<td>100,965.50</td>
<td>81,416.96</td>
<td>103,353.41</td>
<td>110,400.86</td>
<td>567,362.19</td>
</tr>
<tr>
<td>Ivins</td>
<td>39,740.52</td>
<td>49,582.89</td>
<td>52,679.39</td>
<td>42,484.46</td>
<td>53,929.26</td>
<td>57,616.21</td>
<td>296,032.74</td>
</tr>
<tr>
<td>Santa Clara</td>
<td>31,615.51</td>
<td>39,449.46</td>
<td>41,916.37</td>
<td>33,807.13</td>
<td>42,913.22</td>
<td>45,852.73</td>
<td>235,554.42</td>
</tr>
<tr>
<td>St George</td>
<td>315,972.38</td>
<td>394,299.27</td>
<td>418,983.71</td>
<td>337,949.46</td>
<td>428,967.81</td>
<td>458,399.83</td>
<td>2,354,572.46</td>
</tr>
<tr>
<td>Washington</td>
<td>93,715.60</td>
<td>116,920.83</td>
<td>124,218.50</td>
<td>100,175.26</td>
<td>127,162.72</td>
<td>135,849.11</td>
<td>698,042.01</td>
</tr>
<tr>
<td>Participating Entities</td>
<td>557,228.82</td>
<td>695,293.11</td>
<td>738,763.47</td>
<td>595,833.27</td>
<td>756,326.42</td>
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<tr>
<td>Contribution</td>
<td>55,722.88</td>
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<td>75,632.64</td>
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**Participation Rate** 10.0%

### Scenario 2: 15% of Annual Road Fund Receipts

<table>
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<tr>
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<th>(July-Aug)</th>
<th>(Sept - Oct)</th>
<th>(Nov - Dec)</th>
<th>(Jan - Feb)</th>
<th>(Mar - April)</th>
<th>(May - June)</th>
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<tbody>
<tr>
<td>Hurricane</td>
<td>76,184.81</td>
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<td>100,965.50</td>
<td>81,416.96</td>
<td>103,353.41</td>
<td>110,400.86</td>
<td>567,362.19</td>
</tr>
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<td>Ivins</td>
<td>39,740.52</td>
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<td>42,484.46</td>
<td>53,929.26</td>
<td>57,616.21</td>
<td>296,032.74</td>
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<td>Santa Clara</td>
<td>31,615.51</td>
<td>39,449.46</td>
<td>41,916.37</td>
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<td>45,852.73</td>
<td>235,554.42</td>
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<tr>
<td>St George</td>
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<td>394,299.27</td>
<td>418,983.71</td>
<td>337,949.46</td>
<td>428,967.81</td>
<td>458,399.83</td>
<td>2,354,572.46</td>
</tr>
<tr>
<td>Washington</td>
<td>93,715.60</td>
<td>116,920.83</td>
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<td>135,849.11</td>
<td>698,042.01</td>
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<tr>
<td>Participating Entities</td>
<td>557,228.82</td>
<td>695,293.11</td>
<td>738,763.47</td>
<td>595,833.27</td>
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<td>808,118.74</td>
<td>4,151,563.82</td>
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<tr>
<td>Contribution</td>
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**Participation Rate** 15.0%
Scenario 3: 20% of Annual Road Fund Receipts

<table>
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<th>Total For Year (FY 2011)</th>
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</thead>
<tbody>
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<td>Washington</td>
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<th>(Sept - Oct)</th>
<th>(Nov - Dec)</th>
<th>(Jan - Feb)</th>
<th>(Mar - April)</th>
<th>(May - June)</th>
</tr>
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<td>Ivins</td>
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<td>52,679.39</td>
<td>42,484.46</td>
<td>53,929.26</td>
</tr>
<tr>
<td>Santa Clara</td>
<td>31,615.51</td>
<td>39,449.46</td>
<td>41,916.37</td>
<td>33,807.13</td>
<td>42,913.22</td>
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<td>St George</td>
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<td>337,949.46</td>
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<td>100,175.26</td>
<td>127,162.72</td>
</tr>
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<table>
<thead>
<tr>
<th>Participation</th>
<th>Contribution</th>
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<td>139,058.62</td>
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<tr>
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Participation Rate: 20.0%
## APPENDIX D  GENERAL SALES AND USE TAX REVENUE ALTERNATIVES

### Scenario 1: 2% Allocation to Regional Transit

<table>
<thead>
<tr>
<th>Zip Code</th>
<th>Hurricane</th>
<th>Ivins</th>
<th>Santa Clara</th>
<th>St. George</th>
<th>Washington City</th>
<th>Subtotal</th>
<th>Washington County (County-wide)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010 Taxable Sales</td>
<td>$157,521,455</td>
<td>$22,279,849</td>
<td>$18,396,840</td>
<td>$1,393,690,095</td>
<td>$242,280,151</td>
<td>$1,834,168,390</td>
<td>$2,009,882,778</td>
</tr>
<tr>
<td>Local Option (@ 1%)</td>
<td>$1,575,215</td>
<td>$222,798</td>
<td>$183,968</td>
<td>$13,936,901</td>
<td>$2,422,802</td>
<td>$18,341,684</td>
<td>$20,098,828</td>
</tr>
<tr>
<td>County Option (@ .25%)</td>
<td>$393,804</td>
<td>$55,700</td>
<td>$45,992</td>
<td>$3,484,225</td>
<td>$605,700</td>
<td>$4,585,421</td>
<td>$5,024,707</td>
</tr>
<tr>
<td>Total 2% Allocation to Regional Transit</td>
<td>$1,969,018</td>
<td>$278,498</td>
<td>$229,961</td>
<td>$17,421,126</td>
<td>$3,028,502</td>
<td>$22,927,105</td>
<td>$25,123,535</td>
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</tbody>
</table>

### Scenario 2: 5% Allocation to Regional Transit

<table>
<thead>
<tr>
<th>Zip Code</th>
<th>Hurricane</th>
<th>Ivins</th>
<th>Santa Clara</th>
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<td>$3,028,502</td>
<td>$22,927,105</td>
<td>$25,123,535</td>
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</table>

### Scenario 3: 7% Allocation to Regional Transit

<table>
<thead>
<tr>
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<th>Hurricane</th>
<th>Ivins</th>
<th>Santa Clara</th>
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<tr>
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<td>$3,028,502</td>
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<td>$25,123,535</td>
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**Scenario 4: 10% Allocation to Regional Transit**

<table>
<thead>
<tr>
<th></th>
<th>Hurricane</th>
<th>Ivins</th>
<th>Santa Clara</th>
<th>St. George</th>
<th>Washington City</th>
<th>Subtotal</th>
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<tbody>
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<td><strong>2010 Taxable Sales</strong></td>
<td>$157,521,455</td>
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<td>$18,396,840</td>
<td>$1,393,690,095</td>
<td>$242,280,151</td>
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<tr>
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<td>84770/84790</td>
<td>84780</td>
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<td></td>
</tr>
<tr>
<td><strong>Local Option (@ 1%)</strong></td>
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<td>$222,798</td>
<td>$183,968</td>
<td>$13,936,901</td>
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</tr>
<tr>
<td><strong>Total</strong></td>
<td>$1,969,018</td>
<td>$278,498</td>
<td>$229,961</td>
<td>$17,421,126</td>
<td>$3,028,502</td>
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10% Allocation to Regional Transit

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<th>Santa Clara</th>
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<th>Washington City</th>
<th>Subtotal</th>
<th>Washington County (County-wide)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total</strong></td>
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<td>$27,850</td>
<td>$22,996</td>
<td>$1,742,113</td>
<td>$302,850</td>
<td>$2,292,710</td>
<td>$2,512,353</td>
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</table>
APPENDIX E  GRANTS

Urbanized Area Formula Program (5307)

Overview: The Urbanized Area Formula Program makes Federal resources available to urbanized areas and to Governors for transit capital and operating assistance in urbanized areas and for transportation related planning. An urbanized area is an incorporated area with a population of 50,000 or more that is designated as such by the U.S. Department of Commerce, Bureau of the Census.

Eligible Recipients: Funding is made available to designated recipients that must be public bodies with the legal authority to receive and dispense Federal funds. Governors, responsible local officials and publicly owned operators of transit services are to designate a recipient to apply for, receive, and dispense funds for transportation management areas pursuant to 49USCA5307(a)(2). Generally, a transportation management area is an urbanized area with a population of 200,000 or over. The Governor or Governor’s designee is the designated recipient for urbanized areas between 50,000 and 200,000.

Eligible Activities: Eligible activities include planning, engineering design and evaluation of transit projects and other technical transportation-related studies; capital investments in bus and bus-related activities such as replacement of buses, overhaul of buses, rebuilding of buses, crime prevention and security equipment and construction of maintenance and passenger facilities; and capital investments in new and existing fixed guideway systems including rolling stock, overhaul and rebuilding of vehicles, track, signals, communications, and computer hardware and software. All preventive maintenance and some Americans with Disabilities Act complementary paratransit service costs are considered capital costs.

For urbanized areas with populations less than 200,000, operating assistance is an eligible expense. In these areas, at least one percent of the funding apportioned to each area must be used for transit enhancement activities such as historic preservation, landscaping, public art, pedestrian access, bicycle access, and enhanced access for persons with disabilities.

For urbanized areas with 200,000 in population and over, funds are apportioned and flow directly to a designated recipient selected locally to apply for and receive Federal funds. For urbanized areas under 200,000 in population, the funds are apportioned to the Governor of each state for distribution. A few areas under 200,000 in population have been designated as transportation management areas and receive apportionments directly.

Funding Availability: Funds are available the year appropriated plus three years (total of four years).

Allocation of Funding: Funding is apportioned on the basis of legislative formulas. For areas of 50,000 to 199,999 in population, the formula is based on population and population density. For areas with populations of 200,000 and more, the formula is based on a combination of bus revenue vehicle miles, bus passenger miles, fixed guideway revenue vehicle miles, and fixed guideway route miles as well as population and population density.

Match: The Federal share is not to exceed 80 percent of the net project cost. The Federal share may be 90 percent for the cost of vehicle-related equipment attributable to compliance with the Americans with Disabilities Act and the Clean Air Act. The Federal share may also be 90 percent for projects or portions of projects related to bicycles. The Federal share may not exceed 50 percent of the net project cost of operating assistance.

Additional Information: For additional information about the Section 5307 Program, contact the Office of Program Management: (202) 366-2053.

**Major Capital Investments (New Starts & Small Starts)(5309)**

**Overview:** The transit capital investment program (49 U.S.C. 5309) provides capital assistance for three primary activities:

- New fixed guideway systems (New Starts program and Small Starts)
- New and replacement buses and facilities (Bus and Bus Related Facilities program)
- Modernization of existing rail systems (Fixed Guideway Modernization program).

The New Starts program provides funds for construction of new fixed guideway systems or extensions to existing fixed guideway systems. The Small Starts program provides funds to capital projects that either (a) meet the definition of a fixed guideway for at least 50 percent of the project length in the peak period or (b) are corridor-based bus projects with 10 minute peak/15 minute off-peak headways or better while operating at least 14 hours per weekday. The Federal assistance provided or to be provided under Section 5309(e) must be less than $75 million and the project must have a total capital cost of less than $250 million, both in year of expenditure dollars.

**Eligible Recipients:** Eligible applicants under the New Starts program are public bodies and agencies (transit authorities and other state and local public bodies and agencies thereof) including states, municipalities, other political subdivisions of states; public agencies and instrumentalities of one or more states; and certain public corporations, boards, and commissions established under state law.

**Eligible Activities:** Eligible activities are light rail, rapid rail (heavy rail), commuter rail, monorail, automated fixed guideway system (such as a “people mover”), or a busway/high occupancy vehicle (HOV) facility, or an extension of any of these. Projects become candidates for funding under this program by successfully completing the appropriate steps in the major capital investment planning and project development process.

Major new fixed guideway projects, or extension to existing systems financed with New Starts funds, typically receive these funds through Full Funding Grant Agreement (New Starts) or a Project Construction Grant Agreement (Small Starts) that defines the scope of the project and specifies the total multi-year Federal commitment to the project.

**Funding Availability:** Funds are available the year appropriated plus two years (total of three years)

**Allocation of Funding:** Historically, the program has been fully earmarked. However, if unallocated or discretionary funds are available, those funds may be allocated at the discretion of the Secretary of Transportation.

**Match:** The statutory match for New Starts funding is 80 percent Federal, 20 percent local. However, for projects under a Full Funding Grant Agreement (FFGA), FTA continues to encourage project sponsors to request a Federal New Starts funding share that is as low as possible. The Congressional Conference Report that accompanied the FY 2002 Department of Transportation Appropriations Act instructs “FTA not to sign any new full funding grant agreements after September 30, 2002 that have a maximum Federal share of higher than 60 percent.”

**Additional Information:** For additional information about the Section 5309(b)(1) Program, contact the Office of Program Management: (202) 366-2053.

**Source:** U.S. Department of Transportation, Federal Transit Administration, [http://www.fta.dot.gov/grants/13094_3559.html](http://www.fta.dot.gov/grants/13094_3559.html)
TIGER (USDOT) Grants

The American Recovery and Reinvestment Act (ARRA) established the Transportation Investment Generating Economic Recovery Program (TIGER), which fosters innovative, multi-modal and multi-jurisdictional transportation projects that promise significant economic and environmental benefits to an entire metropolitan area, a region, or the nation.

The first iteration of the program (TIGER 1) provided $1.5 Billion of Recovery Act funds to the U.S. Department of Transportation, and Secretary of Transportation (OST) allocated $448 million of this amount for transit and intermodal facilities throughout the United States.

As part of the FY 2010 Appropriations, Congress provided $600 million for a second iteration of the program (TIGER 2), or National Infrastructure Investments (NII) in order to fund a variety of planning and capital projects. Of this amount, the Secretary of Transportation allocated $170 million for transit capital and planning projects throughout the United States.

The FY 2010 Appropriations also provided $527 million for a third iteration of the TIGER program (TIGER 3) in order to fund a variety of capital projects throughout the United States.

### Formula Grants for Other than Urbanized Areas (5311)

**Overview:** The Formula Grants For Other than Urbanized Areas is a rural program that is formula based and provides funding to states for the purpose of supporting public transportation in rural areas, with population of less than 50,000. The goal of the program is to provide the following services to communities with population less than 50,000:

- Enhance the access of people in nonurbanized areas to health care, shopping, education, employment, public services, and recreation.
- Assist in the maintenance, development, improvement, and use of public transportation systems in nonurbanized areas.
- Encourage and facilitate the most efficient use of all transportation funds used to provide passenger transportation in nonurbanized areas through the coordination of programs and services.
- Assist in the development and support of intercity bus transportation.
- Provide for the participation of private transportation providers in nonurbanized transportation.

**Eligible Recipients:** Section 3013 (s) of the Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU), amend eligible recipients to include a State or Indian tribe that receives a Federal transit program grant directly from the Federal Government. A subrecipient of the program includes a State or local governmental authority, a nonprofit organization, or an operator of public transportation or intercity bus service that receives federal transit program grant funds indirectly through a recipient.

**Eligible Activities:** An eligible recipient may use the funding for capital, operating, and administrative expenses for public transportation projects that meet the needs of rural communities. Examples of eligible activities include: capital projects; operating costs of equipment and facilities for use in public transportation; and the acquisition of public transportation services, including service agreements with private providers of public transportation services.

The state must use 15 percent of its annual apportionment to support intercity bus service, unless the Governor certifies, after consultation with affected intercity bus providers that the needs of the state are adequately met.

**Funding Availability:** Funds are available the year appropriated plus two years (total of three years).

**Allocation of Funding:** FTA apportions Section 5311 funds to the States by a statutory formula using the latest available U.S. decennial census data. Eighty percent of the statutory formula is based on the nonurbanized population of the States. Twenty percent of the formula is based on land area. No State may receive more than 5 percent of the amount apportioned for land area.

In addition, FTA adds amounts apportioned based on nonurbanized population according to the growing States formula factors of 49 U.S.C. 5340 to the amounts apportioned to the States under the Section 5311 program.

**Match:** The Federal share of eligible capital and project administrative expenses may not exceed 80 percent of the net cost of the project. For operating, the Federal share may not exceed 50 percent of the net operating cost of the project. For projects that meet the requirements of the Americans with Disabilities Act, the Clean Air Act, or bicycle access projects, they may be funded at 90 percent Federal match.

**Additional Information:** For additional information about the Section 5311 Program, contact the Office of Program Management: (202) 366-2053.


APPENDIX F  SAMPLE SURVEY QUESTIONS

Potential Household Travel Survey Transit Questions

• Where do you **Live**?  City / Neighborhood: __________________________

• Where do you **Work**?  City / Neighborhood: __________________________

• Are you aware of the public transportation services (bus and paratransit) in the St. George region provided by SunTran?  Y / N

• Is your household served by transit?  Y / N / Don’t Know

• Have you used public transportation (SunTran) in the last year?  Regularly / Occasionally / Never

• If you or your household has used the SunTran public transit system, what was the motivation for using the system?
  - Economic motivation -- “Save Money & Resources”
  - Convenience -- Provided an easier way to get to and from certain destinations
  - Necessity -- needed transportation and did not have other means of travel
  - Environmental Consideration -- desire to reduce carbon emissions and negative impact on environment

• What is your opinion of transit service in the St. George region?
  - The service is adequate
  - The service should be expanded in the city of St George
  - The service should be expanded in St George and extended to other nearby communities
  - The service should be reduced or eliminated
  - Don’t know

• Regarding existing or expanded transit service, do you believe (mark all that apply):
  - I would use the service myself
  - Members of my household would use the service
  - It would be important for others in the community
  - It primarily should serve seniors and those with limited mobility
  - It’s not important

• Which of the following would encourage you to make greater use of transit service? (mark all that apply)
o More frequent service  
o Faster service  
o Service to the new Airport  
o Service extended to nearby communities (e.g. Washington, Ivins)  
o Service to Zion National Park  
o Gas price increase ($1 or more)  
o Free transit service  
o Nothing  

• Which one transit improvement, if any, would be most important to you?  

• If the public transit system were expanded in terms of frequency of routes, additional locations and broader coverage, would you:  
  o Be more likely to use the system  
  o Be less likely to use the system  
  o Wouldn’t change mine or my household’s utilization of the system
APPENDIX G CONCEPT ROUTE ASSUMPTIONS

Common Assumptions

- SunTran would domicile and maintain the buses at their operation facilities.
- Bus stops and benches would be supplied and maintained by the City that this new route would serve at that city's expense. Cost for a simple bench with a concrete slab would be approximately $1,000 and the cost for a bench with a shelter would be approximately $7,000.
- All liability at these stops would be the responsibility of that city.
- All liability on the buses would be the responsibility of SunTran.
- The interlocal agreements would have 5-year durations.
- Route would require one additional bus which would cost $390,000.
- Cost of gas was assumed to be $3.00 per gallon
- Advertising and fare revenues would be retained by SunTran to pay for administration and fluctuations in cost during the term of the agreement.

Traditional Fixed Route Specific Assumptions

- The traditional fixed route would operate on the same schedule as existing SunTran service.
- One paratransit bus would be required which would cost $85,000. This bus would also serve as a backup bus for the fixed route.
- The fixed route bus would get 7 miles per gallon; operate 200 miles per day; 6 days per week; and 52 weeks per year.
- The paratransit bus would get 7 miles per gallon; operate 177 miles per day; 6 days per week; and 52 weeks per year.
- The fixed route option would require two full time employees at $13.00 per hour and 60% for benefits; and one part time employee at $13.00 per hour.
- Cost of insurance for SunTran would be $1,000 annually.
- Cost of maintenance labor would be $16,000 annually.
- Cost of parts would be $4,000 annually.
Commuter Route Assumptions

- The commuter route would operate 5 times per day.
- One backup bus would be required which would cost $85,000.
- The commuter route bus would get 7 miles per gallon; operate 111 miles per day; 6 days per week; and 52 weeks per year.
- The commuter route option would require one and a half part time employee at $13.00 per hour.
- Cost of insurance for SunTran would be $1,000 annually.
- Cost of maintenance labor would be $16,000 annually.
- Cost of parts would be $4,000 annually.
APPENDIX H REFERENCES


