

BASIN TRANSIT SERVICE TRANSPORTATION DISTRICT BOARD OF DIRECTORS MEETING

Wednesday, April 1, 2026

4:15 PM

Conference Call No. 1-(669)900-6833 ID:891 2870 1582 Passcode: 587825

<https://us06web.zoom.us/j/89128701582?pwd=yg1Mpf6Q1CTs8baNbN45CGszXTb4B9.1>

ORDER	AGENDA	TYPE
A.	CALL TO ORDER - Chairperson	
B.	PLEDGE OF ALLEGIANCE	
C.	INTRODUCTION OF GUESTS	
D.	PUBLIC COMMENT: Members of the Public are invited to address the Board on items not listed on the agenda that are within the scope and jurisdiction of the District. Comments are limited to three (3) minutes per person.	
E.	<p>CONSENT AGENDA</p> <p>All item(s) listed below are considered to be routine by the Board and will be enacted by one motion. Request approval - Board of Directors Meeting Minutes for February 2026. Approval - Budget Statement for February 2026.</p>	Action
F.	<p>OLD BUSINESS</p> <p>None</p>	
G.	ACTION ITEMS	
	(1.) FY 2023 Single Audit Report	Information
	(2.) Presentation: Transit Coordinated Human Services Transportation Plan	Information
	(3.) Public input to the Board regarding the Transit Coordinated Human Services Transportation Plan	Information
	(3.) Board of Director's vote to adopt the Transit Coordinated Human Services Transportation Plan	Action

- | | | |
|-------|---|--------------------|
| (4.) | General Manager's report | Information |
| (5.) | Board of Directors vote to approve BTS Safety Program | Action |
| (6.) | Resolution 2026-01 Surplus Property | Action |
| (7.) | Resolution 2026-02 Donation of Surplus Property to Coast to Coast Academy | Action |
| (8.) | Resolution 2026-03 Donation of Surplus Property to Klamath County Museum | Action |
| (9.) | Board approval for the General Manager to attend the OTA Strategic Meeting | Action |
| (10.) | Approval to reschedule April Board of Directors Meeting to April 29th, 2026 | Action |

H. NEW BUSINESS - Discussion Only Items

I.

ADJOURNMENT

This meeting is accessible to persons with disabilities. A request for an interpreter for the hearing impaired or for other accommodations for persons with disabilities should be made at least 48 hours before the meeting by calling Basin Transit Service at 541-883-2877.



Board Of Directors Meeting

March 2026

Conducted April 1st, 2026 Based on Approval





INFORMATION

Public Comment



January

CONSENT AGENDA

All item(s) listed below are considered to be routine by the Board and will be enacted by one motion. Request approval - Board of Directors Meeting Minutes for February 2026 and Budget Statement for February 2026.

**BASIN TRANSIT SERVICE TRANSPORTATION DISTRICT
BOARD OF DIRECTORS MEETING**

February 25th, 2026

The regular meeting of the Basin Transit Service Board of Directors was held in person and by video conference (Zoom) at 1130 Adams Street, Klamath Falls, Oregon following public notice in accordance with ORS 192.620.

MEMBERS' PRESENT:

Erik Noble
Sandra Fox
Craig Fleck
Perry Andrews
Nora Foster
Edwin Tuhy

ABSENT: Karen Bailey

STAFF PRESENT:

Adrian Mateos – General Manager
Theresa O'Connor – HR Manager
Michelle Carpenter – Finance Manager
Craig Johnston – Operations Manager

A. CALL TO ORDER – Erik Noble (Chair)

Roll call/announcement of quorum at approximately 4:15 PM.

B. PLEDGE OF ALLEGIANCE

C. PUBLIC COMMENT – None See below

No public comment. No members of the public were in attendance.

D. GENERAL MANAGER'S REPORT

Mr. Mateos provided updates on major agency initiatives:

- **Audit Update:** The audit is currently in the review phase, with auditors preparing financial statements and submitting adjusting journal entries; staff reported the process

has gone smoothly with minimal follow-up, and work continues to catch up prior audit cycles with the FY2024 audit next and potential to proceed directly into FY2025.

- **Human Coordinated Plan:** Staff provided an update on the Human Coordinated Transportation Plan, noting a Project Advisory Committee meeting scheduled for March 2 and that outreach will include a hybrid option to improve accessibility.
- **Basin Connect North:** Service is scheduled to launch March 2, 2026, providing demand-response transportation to rural communities including Beaver Marsh, Chemult, Crescent, Gilchrist, La Pine, Bend, and Crescent Lake Junction; staff reported strong community interest, STIF funding will support fare-free service, two buses have been assigned, and one operator has been hired with additional staff to be trained for coverage.
- **Employee Climate Survey:** Results indicate a strong and stable workplace, with high retention intent, positive teamwork and supervisory support, and over 70% participation; areas for improvement include communication consistency, policy enforcement, pace of change, workplace conduct response, and expanded training opportunities.
- **Technology Implementation:** Staff presented the Swiftly platform, which will provide real-time tracking, passenger information, and improved operational reporting, with pilot testing planned for April 2026.
- **Internship Project:** An intern presented on the coordination of fleet vehicle wraps for 21 vehicles, highlighting successful project management, coordination with multiple stakeholders, and maintenance of service operations during implementation.

No Board questions.

E. CONSENT AGENDA

All items listed below are considered to be routine by the Board and will be enacted by one motion.

Approval – Board of Directors Meeting Minutes for January 2026

Approval – Budget Statement for January 2026

Motion: Perry Andrews

Second: Nora Foster

Absent: Karen Bailey

Nays: None

Yea: Erik Noble, Sandra Fox, Craig Fleck, Perry Andrews, Nora Foster, Edwin Tuhy

Passed: Unanimously Other: _____

H. ACTION ITEMS

1. Approval to reschedule March 25, 2026, Board Meeting to April 1, 2026

Motion: Perry Andrews | Second: Nora Foster

Nays: None

Yea: Erik Noble, Sandra Fox, Craig Fleck, Perry Andrews, Nora Foster, Edwin Tuhy

Passed: Unanimously Other: _____

2. Approval to adopt Public Records Retention and Disposal Policy

Motion: Nora Foster | Second: Criag Fleck

Nays: None

Yea: Erik Noble, Sandra Fox, Craig Fleck, Perry Andrews, Nora Foster, Edwin Tuhy

Passed: Unanimously Other: _____

3. Approval to adopt Procurement Policy

Motion: Craig Fleck | Second: Perry Andrews

Nays: None

Yea: Erik Noble, Sandra Fox, Craig Fleck, Perry Andrews, Nora Foster, Edwin Tuhy

Passed: Unanimously Other: _____

4. Approval to adopt Asset Management Policy

Motion: Perry Andrews | Second: Nora Foster

Nays: None

Yea: Erik Noble, Sandra Fox, Craig Fleck, Perry Andrews, Nora Foster, Edwin Tuhy

Passed: Unanimously Other: _____

5. Approval for GM Attendance at FTA Drug and Alcohol Program National Conference & Training

Consent

Passed: Unanimously Other: _____

I. NEW BUSINESS – None See below

J. ADJOURNMENT

The Board having no further business, Erik Noble adjourned the meeting at 5:01PM.

Recording Secretary for Session: Theresa O'Connor

Basin Transit Service Transportation District

Bank Balance Report as of February 2026

	Feb 28, 2026	Feb 28, 2025
Checking General -Columbia Bank	\$ 144,265.52	\$ 116,801.02
Checking Taxes-Columbia Bank	\$ -	\$ 8,918.53
Money Market-Columbia Bank	\$ 111,298.56	\$ 4,116,756.38
Petty Cash	\$ 125.00	\$ 125.00
Certificate of Deposits-Columbia Bank	\$ 182,279.05	\$ 321,716.85
LGIP Accounts		
LGIP Operations	\$ 1,549,539.21	\$ -
LGIP STIF Payroll In District	\$ 1,629,572.90	\$ -
LGIP STIF Population Out of District	\$ 247,964.23	\$ -
LGIP STIF Population In District	\$ 298,174.10	\$ -
LGIP Capital Reserve	\$ 221,217.14	\$ -
LGIP STIF Payroll Out of District	\$ 759,896.68	\$ -
Total LGIP Balance	\$ 4,706,364.26	\$ -
Total Current Assets	\$ 5,144,332.39	\$ 4,564,317.78
LGIP Interest Earned February 2026	\$ 14,758.02	
Total YTD LGIP Interest Earned FYE 2026	\$ 128,832.31	

**Basin Transit Service Transp. District
Klamath Falls, Oregon
For the Eight Months Ending February 28, 2026**

Summary of Revenues and Expenses

	Current Month	Year to Date	% of Budget	Fiscal Budget	Over (Under)
<u>Revenues</u>					
Begin Balance - General Fund	0	1,543,517	93.40	1,652,552	(109,035)
Local Tax Revenues	35,047	1,592,472	99.64	1,598,296	(5,824)
State Revenues	0	803,752	34.43	2,334,503	(1,530,751)
Federal Revenues	0	653,902	46.35	1,410,796	(756,894)
Fare Revenues	5,593	61,936	64.15	96,550	(34,614)
Other Local Revenues	6,167	47,516	505.49	9,400	38,116
Total Revenues	46,807	4,703,095	66.22	7,102,097	(2,399,002)
<u>Expenses</u>					
Personnel Services	199,511	1,668,877	67.76	2,462,800	(793,923)
Materials & Services	137,304	1,071,040	58.81	1,821,314	(750,274)
Capital Expenditures	97,850	367,068	40.40	908,594	(541,526)
Capital Res Trans from GF	0	0	0.00	75,000	(75,000)
Contingency - GF	0	0	0.00	75,000	(75,000)
Reserve Future Exp - GF	0	0	0.00	0	0
Unappr. Fund Balance - GF	0	0	0.00	0	0
Total Expenses	434,665	3,106,985	59.83	5,192,708	(2,085,723)
Over (Under)	(387,858)	1,596,110	83.59	1,909,389	(313,279)

**Basin Transit Service Transp. District
Klamath Falls, Oregon
For the Eight Months Ending February 28, 2026**

Revenues - General Fund

	Current Month	Year to Date	% of Budget	Fiscal Budget	Over (Under)
<u>Beginning Balance</u>					
Begin Balance - General Fund	0	1,543,517	93.40	1,652,552	(109,035)
Total Beginning Balance	0	1,543,517	93.40	1,652,552	(109,035)
<u>Local Tax Revenues</u>					
Tax Collected / YR Levied	32,874	1,560,668	100.28	1,556,346	4,322
Previous Levied Tax	2,173	31,146	77.87	40,000	(8,854)
Heavy Equipment Rental Tax	0	658	33.74	1,950	(1,292)
Total Local Tax Revenues	35,047	1,592,472	99.64	1,598,296	(5,824)
<u>State Revenues</u>					
STIF Payroll Revenue	0	481,142	29.61	1,625,048	(1,143,906)
STIF Population Revenue	0	39,302	12.39	317,113	(277,811)
STIF Discretionary Revenue	0	169,342	100.00	169,342	0
Rural Veterans Grants	0	20,801	54.74	38,000	(17,199)
Public Transit Assistance	0	93,165	50.36	185,000	(91,835)
Total State Revenues	0	803,752	34.43	2,334,503	(1,530,751)
<u>Federal Revenues</u>					
5304 Planning Grant	0	0	0.00	40,000	(40,000)
5310 Formula Grant	0	126,045	27.48	458,607	(332,562)
5311 Formula Grant	0	492,001	67.98	723,754	(231,753)
5339 Federal Grant	0	35,856	19.03	188,435	(152,579)
Total Federal Revenues	0	653,902	46.35	1,410,796	(756,894)

**Basin Transit Service Transp. District
Klamath Falls, Oregon
For the Eight Months Ending February 28, 2026**

Revenues - General Fund

	Current Month	Year to Date	% of Budget	Fiscal Budget	Over (Under)
<u>Fare Revenue</u>					
Fixed Route Fares	4,956	45,435	60.50	75,097	(29,662)
Organizational Fares	0	4,350	0.00	0	4,350
Basin Lift Fares	637	12,151	56.64	21,453	(9,302)
Total Fare Revenue	5,593	61,936	64.15	96,550	(34,614)
<u>Other Local Revenues</u>					
Misc Income	1,159	6,311	252.44	2,500	3,811
Interest Income	5,008	35,922	8,980.50	400	35,522
Insurance Claims	0	0	0.00	5,000	(5,000)
Travel & Training Reimb.	0	0	0.00	1,500	(1,500)
Refund Revenue	0	5,283	0.00	0	5,283
Total Other Local Revenues	6,167	47,516	505.49	9,400	38,116
Total Revenues	46,807	4,703,095	66.22	7,102,097	(2,399,002)

**Basin Transit Service Transp. District
Klamath Falls, Oregon
For the Eight Months Ending February 28, 2026**

Personnel Services

	Current Month	Year to Date	% of Budget	Fiscal Budget	Over (Under)
<u>Wages</u>					
Wages - Admin	32,784	237,894	65.64	362,424	(124,530)
Wages- Operations	93,170	784,684	70.90	1,106,790	(322,106)
Wages - Maintenance	26,584	211,884	79.96	265,003	(53,119)
Total Wages	152,538	1,234,462	71.18	1,734,217	(499,755)
<u>Benefits</u>					
Misc Payroll Expense	0	204	0.00	0	204
Workman's Comp Expense	10,785	35,798	83.67	42,783	(6,985)
Medicare Taxes Expense	2,196	17,738	70.54	25,146	(7,408)
OR Unemployment Insurance	2,878	16,477	69.86	23,585	(7,108)
Disability/Accident/Life Exp.	642	8,400	76.65	10,959	(2,559)
Paid Leave Oregon Exp	606	4,893	70.53	6,937	(2,044)
Medical & Dental Insurance	16,764	242,570	54.95	441,417	(198,847)
Employer Retirement Exp	3,710	32,491	46.26	70,235	(37,744)
FICA Tax	9,392	75,844	70.54	107,521	(31,677)
Total Benefits	46,973	434,415	59.62	728,583	(294,168)
Total Wages & Benefits	199,511	1,668,877	67.76	2,462,800	(793,923)

**Basin Transit Service Transp. District
Klamath Falls, Oregon
For the Eight Months Ending February 28, 2026**

Materials & Services

	Current Month	Year to Date	% of Budget	Fiscal Budget	Over (Under)
<u>Administration - General Fund</u>					
Utilities Expense	3,715	19,930	54.98	36,250	(16,320)
Telephone Expense	2,511	17,700	49.24	35,950	(18,250)
Internet & Email Expense	70	1,124	32.11	3,500	(2,376)
Print & Duplication Expense	918	9,829	77.09	12,750	(2,921)
Public Information Expense	618	3,054	44.91	6,800	(3,746)
Legal Advertising Expense	0	0	0.00	3,500	(3,500)
Travel & Meals Expense	1,426	5,525	212.50	2,600	2,925
Legal Expense	792	15,623	60.09	26,000	(10,377)
Finance Expense	24,640	127,085	79.43	160,000	(32,915)
Personnel Expense	490	41,825	114.59	36,500	5,325
Employee Events	1,279	3,717	49.56	7,500	(3,783)
Membership Dues Exp	0	9,666	72.40	13,350	(3,684)
Bank Fees	377	3,138	55.05	5,700	(2,562)
Interest & Penalties	0	86	0.00	0	86
Election Expense	0	0	0.00	3,500	(3,500)
Information System Expense	902	47,371	167.39	28,300	19,071
Publications & Subscriptions	0	1,092	288.89	378	714
Postage & Shipping	25	100	6.25	1,600	(1,500)
Employee Recognition	50	747	18.68	4,000	(3,253)
Office Supplies Expense	1,644	10,579	57.81	18,300	(7,721)
Office Equipment	2,500	10,166	0.00	0	10,166
Total Administration - General Fund	41,957	328,357	80.78	406,478	(78,121)

**Basin Transit Service Transp. District
Klamath Falls, Oregon
For the Eight Months Ending February 28, 2026**

Materials & Services

<u>Operations - General Fund</u>	Current Month	Year to Date	% of Budget	Fiscal Budget	Over (Under)
<i>General Operations</i>					
Facilities & Veh Insurance Exp	0	151,522	86.34	175,500	(23,978)
Training Exp	2,794	4,321	35.27	12,250	(7,929)
Clothing & Gear Exp	690	15,373	83.71	18,364	(2,991)
Safety Services & Supplies Exp	1,260	4,885	76.33	6,400	(1,515)
Other Contract Services Exp	13,412	53,040	80.12	66,200	(13,160)
Other Materials & Supplies Exp	3	52	0.41	12,548	(12,496)
Total General Operations	18,159	229,193	78.69	291,262	(62,069)
<i>Facilities Maintenance</i>					
Radio Maint Exp	0	0	0.00	3,500	(3,500)
Cleaning Supplies Exp	382	2,554	69.97	3,650	(1,096)
Building & Grounds Maint Exp	1,348	18,762	51.05	36,750	(17,988)
Equipment Maint. Exp.	35	1,815	22.69	8,000	(6,185)
Bus Stop / Shelter Exp	0	1,892	53.52	3,535	(1,643)
Total Facilities Maintenance	1,765	25,023	45.14	55,435	(30,412)

**Basin Transit Service Transp. District
Klamath Falls, Oregon
For the Eight Months Ending February 28, 2026**

Materials & Services

	Current Month	Year to Date	% of Budget	Fiscal Budget	Over (Under)
<i>Vehicle Maintenance - Fix Route</i>					
FR Parts & Components Exp	1,651	40,603	90.23	45,000	(4,397)
FR Fuel Exp	9,833	89,311	69.03	129,373	(40,062)
FR Oil Lube Antifreeze Exp	2,835	6,659	121.07	5,500	1,159
FR Tire & Wheel Exp	40	15,203	82.81	18,360	(3,157)
FR Vendor Exp	0	1,442	6.55	22,000	(20,558)
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Total Vehicle Maint - Fix Route	14,359	153,218	69.57	220,233	(67,015)
<i>Vehicle Maintenance - Basin Lift</i>					
BL Parts & Components Exp	584	8,197	58.82	13,936	(5,739)
BL Fuel Exp	3,878	32,606	77.58	42,030	(9,424)
BL Oil Lube Antifreeze Exp	242	314	58.15	540	(226)
BL Tire & Wheel Exp	0	4,957	110.16	4,500	457
BL Vendor Exp	0	428	5.71	7,500	(7,072)
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Total Vehicle Maint - Basin Lift	4,704	46,502	67.88	68,506	(22,004)
<i>Maintenance Tools & Supplies</i>					
Shop Supplies Exp	182	5,850	0.00	0	5,850
Tools & Equipment Exp	389	8,294	82.94	10,000	(1,706)
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Total Maint. Tools & Sup	571	14,144	141.44	10,000	4,144
Total Operations - General Fund	39,558	468,080	72.52	645,436	(177,356)

**Basin Transit Service Transp. District
Klamath Falls, Oregon
For the Eight Months Ending February 28, 2026**

Materials & Services

	Current Month	Year to Date	% of Budget	Fiscal Budget	Over (Under)
<u>Operations - Grants</u>					
<i>5310 Projects</i>					
Contract Services - Dem Resp	21,622	172,976	60.85	284,270	(111,294)
Mobility Mgt. Materials & Ser	0	4,676	46.76	10,000	(5,324)
Total 5310 Projects	21,622	177,652	60.37	294,270	(116,618)
<i>Facilities Projects</i>					
Facilities Major Maintenance	0	0	0.00	98,000	(98,000)
Engineering Exp	0	0	0.00	25,000	(25,000)
Total Facilities Projects	0	0	0.00	123,000	(123,000)
Vehicle Major Maintenance					
Vehicle Major Maintenance	0	0	0.00	50,000	(50,000)
Total Vehicle Major Maint	0	0	0.00	50,000	(50,000)
<i>Operations Projects (Point to Point)</i>					
Basin Connect - South	156	10,896	9.47	115,044	(104,148)
Basin Connect - North	19,388	21,239	37.21	57,086	(35,847)
Total Operations Projects	19,544	32,135	18.67	172,130	(139,995)
<i>Plannning Projects</i>					
Planning Expense	13,363	42,441	42.44	100,000	(57,559)
Total Planning Projects	13,363	42,441	42.44	100,000	(57,559)

**Basin Transit Service Transp. District
Klamath Falls, Oregon
For the Eight Months Ending February 28, 2026**

Materials & Services

	Current Month	Year to Date	% of Budget	Fiscal Budget	Over (Under)
<i>Veterans Projects</i>					
Veterans Mat & Svcs Exp	0	19,470	64.90	30,000	(10,530)
Total Veterans Projects	0	19,470	64.90	30,000	(10,530)
Total Operations - Grants	54,529	271,698	35.31	769,400	(497,702)
Total Materials & Services	136,044	1,068,135	58.65	1,821,314	(753,179)

**Basin Transit Service Transp. District
Klamath Falls, Oregon
For the Eight Months Ending February 28, 2026**

Capital Expenditures

	Current Month	Year to Date	% of Budget	Fiscal Budget	Over (Under)
<u>Capital Categories</u>					
Motorized Vehicle Expense	97,850	323,640	50.92	635,538	(311,898)
Office Equipment Expense	0	11,867	0.00	0	11,867
Shop Equipment Expense	0	2,731	0.00	0	2,731
PC & Comm. Equip. Expense	0	3,746	0.00	0	3,746
Bus Stop & Shelter Expense	0	24,124	10.35	233,056	(208,932)
Land & Building Expense	0	960	2.40	40,000	(39,040)
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Total Capital Expenditures	97,850	367,068	40.40	908,594	(541,526)

**Basin Transit Service Transp. District
Klamath Falls, Oregon
For the Eight Months Ending February 28, 2026**

STIF Revenue Funds

	Current Month	Year to Date	% of Budget	Fiscal Budget	Over (Under)
<u>Revenues</u>					
STIF ID - Payroll Beg Balance	0	1,593,053	85.24	1,868,967	(275,914)
STIF ID Payroll Interest	5,035	50,802	159.45	31,861	18,941
STIF ID Payroll Revenue	0	579,901	74.23	781,214	(201,313)
Total STIF ID Payroll Rev	5,035	2,223,756	82.91	2,682,042	(458,286)
STIF OD - Payroll Beg Balance	0	467,022	70.44	662,974	(195,952)
STIF OD Payroll Interest	2,347	21,501	230.20	9,340	12,161
STIF OD Payroll Revenue	0	122,159	76.09	160,546	(38,387)
Total STIF OD Payroll Rev	2,347	610,682	73.32	832,860	(222,178)
STIF ID - Pop Beg Balance	0	275,914	0.00	0	275,914
STIF ID Pop Interest	921	8,521	154.42	5,518	3,003
STIF ID Pop Revenue	0	86,940	80.61	107,849	(20,909)
Total STIF ID Pop Rev	921	371,375	327.59	113,367	258,008
STIF OD - Pop Beg Balance	0	195,952	0.00	0	195,952
STIF OD Pop Interest	766	6,744	172.08	3,919	2,825
STIF OD Pop Revenue	0	66,826	80.60	82,914	(16,088)
Total STIF OD Pop Rev	766	269,522	310.39	86,833	182,689
Total STIF Revenues	9,069	3,475,335	93.55	3,715,102	(239,767)

Basin Transit Service Transp. District
Klamath Falls, Oregon
For the Eight Months Ending February 28, 2026

STIF Revenue Funds

	Current Month	Year to Date	% of Budget	Fiscal Budget	Over (Under)
<u>Expenses</u>					
STIF ID PR Trans Other Agencie	0	0	0.00	0	0
STIF OD PR Trans Other Agencie	0	0	0.00	0	0
STIF ID Pop Trans Other Agenci	0	0	0.00	22,653	(22,653)
STIF OD Pop Trans Other Agenci	0	0	0.00	0	0
Total Funds to Other Agencies	0	0	0.00	22,653	(22,653)
STIF ID Payroll Trans to GF	0	461,156	34.93	1,320,247	(859,091)
STIF OD Payroll Trans to GF	0	20,340	6.67	304,801	(284,461)
STIF ID Pop Trans to GF	0	39,346	21.01	187,270	(147,924)
STIF OD Pop Trans to GF	0	0	0.00	129,843	(129,843)
Total Funds to GF	0	520,842	26.82	1,942,161	(1,421,319)
STIF ID PR Res Fut Expenditure	0	0	0.00	1,063,228	(1,063,228)
STIF OD PR Res Fut Expenditure	0	0	0.00	332,107	(332,107)
STIF ID Pop Res Fut Expenditur	0	0	0.00	202,011	(202,011)
STIF OD Pop Res Fut Expenditur	0	0	0.00	152,942	(152,942)
Total Reserve for Fut Expenditure	0	0	0.00	1,750,288	(1,750,288)
Total Expenses	0	(520,842)	14.02	(3,715,102)	3,194,260

**Basin Transit Service Transp. District
Klamath Falls, Oregon
For the Eight Months Ending February 28, 2026**

Capital Reserve

	Current Month	Year to Date	% of Budget	Fiscal Budget	Over (Under)
<u>Revenues</u>					
Beg. Balance - Capital Reserve	0	396,836	99.89	397,272	(436)
Capital Res Interest	697	5,878	73.06	8,045	(2,167)
Capital Res Trans from GF	0	0	0.00	75,000	(75,000)
	<hr/>	<hr/>		<hr/>	<hr/>
Total Revenues	697	402,714	83.84	480,317	(77,603)
<u>Expenses</u>					
Reserve for Future Exp	0	0	0.00	(479,881)	479,881
	<hr/>	<hr/>		<hr/>	<hr/>
Total Expenses	0	0	0.00	(479,881)	479,881
Total Capital Reserve	697	402,714	92,365.60	436	402,278



Sorren – Aria Bettinger

***Basin Transit Service FY 2023 Single Audit
Report***



March 12, 2026

Board of Directors
Basin Transit Service Transportation District
Klamath Falls, Oregon

This letter is to inform the Board of Directors of Basin Transit Service Transportation District (the District) about significant matters related to the conduct of our audit as of and for the year ended June 30, 2023, so that it can appropriately discharge its oversight responsibility, and we comply with our professional responsibilities.

Auditing standards generally accepted in the United States of America (AU-C 260, *The Auditor's Communication With Those Charged With Governance*) require the auditor to promote effective two-way communication between the auditor and those charged with governance. Consistent with this requirement, the following summarizes our responsibilities regarding the financial statement audit as well as observations arising from our audit that are significant and relevant to your responsibility to oversee the financial reporting process.

Our Responsibilities With Regard to the Financial Statement Audit

Our responsibility under auditing standards generally accepted in the United States of America and *Government Auditing Standards* issued by the Comptroller General of the United States have been described to you in our engagement letter dated February 6, 2026. The audit of the financial statements does not relieve management or those charged with governance of their responsibilities, which are also described in that letter.

Overview of the Planned Scope and Timing of the Financial Statement Audit

We have issued a separate communication dated January 12, 2026 regarding the planned scope and timing of our audit and identified significant risks.

Significant Accounting Practices, Including Policies, Estimates and Disclosures

In this letter to you, we will discuss our views about the qualitative aspects of the District's significant accounting practices, including significant accounting policies, significant unusual transactions, accounting estimates and financial statement disclosures. The following is a list of the matters which you may wish to monitor for your oversight responsibilities of the financial reporting process:

Significant Accounting Policies

Management has the responsibility to select and use appropriate accounting policies. A summary of the significant accounting policies adopted by the District is included in *Note 1* to the financial statements. There have been no initial selection of accounting policies and no changes in significant accounting policies or their application during the year ended June 30, 2023. No matters have come to our attention that would require us, under professional standards, to inform you about (1) the methods used to account for significant unusual transactions and (2) the effect of significant accounting policies in controversial or emerging areas for which there is a lack of authoritative guidance or consensus.

Significant Account Estimates

Accounting estimates are an integral part of the financial statements prepared by management and are based on management's current judgments. Those judgments are normally based on knowledge and experience about past and current events and assumptions about future events. Certain accounting estimates are particularly sensitive because of their significance to the financial statements and because of the possibility that future events affecting them may differ markedly from management's current judgments.

The most sensitive accounting estimates affecting the District's financial statements are:

- Management's estimate of the property taxes receivable is based on information obtained from the Klamath County Tax Department. We evaluated the key factors and assumptions used to develop the estimates in determining that it is reasonable in relation to the financial statements taken as a whole.
- Management's estimate of the accumulated depreciation and related expense for the current year was based on management's estimate of the life expectancy of the fixed assets. We reviewed the capital asset listing, selected a sample, and recalculated the accumulated and current year depreciation expense. We were satisfied that the calculations used were reasonable.

Audit Adjustments and Uncorrected Misstatements

There were no material audit adjustments made to the original trial balance presented to us to begin our audit.

We are not aware of any uncorrected misstatements other than misstatements that are clearly trivial. Uncorrected misstatements or matters underlying these uncorrected misstatements could potentially cause future-period financial statements to be materially misstated, even if we have concluded that the uncorrected misstatements are immaterial to the financial statements under audit.

Internal Control Over Financial Reporting Findings

In planning and performing our audit of the financial statements of the District as of and for the year ended June 30, 2023, in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States, we considered the District's internal control over financial reporting (internal control) as a basis for designing our auditing procedures for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the District's internal control. Accordingly, we do not express an opinion on the effectiveness of the District's internal control.

Our consideration of internal control was for the limited purpose described in the preceding paragraph and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies and therefore material weaknesses or significant deficiencies may exist that were not identified. However, as discussed below, we identified a certain deficiency in internal control that we consider to be a material weakness.

A deficiency in internal control exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, misstatements on a timely basis. A material weakness is a deficiency, or combination of deficiencies in internal control, such that there is a reasonable possibility that a material misstatement of the entity's financial statements will not be prevented, or detected and corrected, on a timely basis. We consider the following deficiency in internal control to be a material weakness:

Segregation of Duties and Oversight

Failure of the information and communication component of internal control to provide complete and accurate outputs because of deficiencies in timeliness, resources, and completeness. This deficiency results in inadequate entity level controls associated with supervision and review.

Internal Control Over Compliance Findings

Our consideration of internal control over compliance was to obtain reasonable assurance about whether material noncompliance with the types of compliance requirements identified as subject to audit in the OMB *Compliance Supplement* that could have a direct and material effect on the District's major federal program and was not designed to identify all deficiencies in internal control over compliance that might be material weaknesses or significant deficiencies in internal control over compliance and therefore, material weaknesses or significant deficiencies may exist that were not identified.

A deficiency in internal control over compliance exists when the design or operation of a control over compliance does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, noncompliance with a type of compliance requirement of a federal program on a timely basis. *A material weakness in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance, such that there is a reasonable possibility that material noncompliance with a type of compliance requirement of a federal program will not be prevented, or detected and corrected, on a timely basis. *A significant deficiency in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance with a type of compliance requirement of a federal program that is less severe than a material weakness in internal control over compliance, yet important enough to merit attention by those charged with governance. We did identify certain deficiencies in internal control over compliance that we consider to be material weaknesses in internal control over compliance:

Equipment and Real Property Management

The Uniform Guidance requires a non-federal entity that has expended federal awards for a grant award to track equipment acquired with federal funding in its capital asset records. The District did not fully comply with this Uniform Guidance requirement applicable to the major federal program tested.

Procurement, Suspension, and Debarment

The Uniform Guidance requires a non-federal entity that has expended federal awards for a grant award on or after December 26, 2014 to document verification that vendors are in good standing or are not suspended or debarred prior to entering into a covered transaction. The District did not fully comply with this Uniform Guidance requirement applicable to the major federal program tested.

Disagreements With Management

For purposes of this letter, professional standards define a disagreement with management as a matter, whether or not resolved to our satisfaction, concerning a financial accounting, reporting, or auditing matter, which could be significant to the District's financial statements or the auditor's report. No such disagreements arose during the course of the audit.

Consultation With Other Accountants

We are not aware of any consultations management had with other accountants about accounting or auditing matters.

Other Matters

In the normal course of our professional association with the District, we generally discuss a variety of matters, including the application of accounting principles and auditing standards, operating conditions affecting the entity, and operating plans and strategies that may affect the risks of material misstatement. None of the matters discussed resulted in a condition to our retention as the District's auditors.

Shared Responsibilities for Independence

Independence is a joint responsibility and is managed most effectively when management, audit committees (or their equivalents), and audit firms work together in considering compliance with American Institute of Certified Public Accountants (AICPA) and *Government Accountability Office* (GAO) independence rules. For Sorren to fulfill its professional responsibility to maintain and monitor independence, management, the Board of Directors, and Sorren each play an important role.

Our Responsibilities

- AICPA and GAO rules require independence both of mind and in appearance when providing audit and other attestation services. Sorren is to ensure that the AICPA and GAO's General Requirements for performing non-attest services are adhered to and included in all letters of engagement.
- Maintain a system of quality control over compliance with independence rules and firm policies.

The Organization's Responsibilities

- Timely inform Sorren, before the effective date of transactions or other business changes, of the following:
 - New affiliates, directors, officers, or person in financial reporting and compliance oversight roles.
 - Changes in the reporting entity impacting affiliates such as partnerships, related entities, investments, joint ventures, component units, jointly governed organizations.
- Provide necessary affiliate information such as new or updated structure charts, as well as financial information required to perform materiality calculations needed for making affiliate determinations.
- Understand and conclude on the permissibility, prior to the District and its affiliates, officers, directors, or persons in a decision-making capacity, engaging in business relationships with Sorren.
- Not entering into arrangements of nonaudit services resulting in Sorren being involved in making management decisions on behalf of the District.
- Not entering into relationships resulting in Sorren, Sorren covered persons or their close family members, temporarily or permanently acting as an officer, director, or person in an accounting, financial reporting or compliance oversight role at the District.

Management Representations

We have requested certain representations from management that are included in the management representation letter dated March 12, 2026.

Closing

We will be pleased to respond to any questions you have about the foregoing. We appreciate the opportunity to be of service to the District.

During our audit we found the management and staff to be very receptive to our comments and suggestions. They were hard-working, diligent, and conscientious about their assigned responsibilities and duties. They were a pleasure to work with.

This report is intended solely for the information and use of the Board of Directors and management, and is not intended to be, and should not be, used by anyone other than these specified parties.

Very truly yours,

A handwritten signature in cursive script that reads "Aria Bettinger".

Aria Bettinger, CPA, Shareholder
Sorren CPAs, P.C.
Medford, Oregon



Financial Statements

**Basin Transit Service Transportation District
Klamath Falls, Oregon**

Includes Supplemental Information
Year Ended June 30, 2023



**BASIN TRANSIT SERVICE TRANSPORTATION DISTRICT
KLAMATH FALLS, OREGON
YEAR ENDED JUNE 30, 2023**

List of Elected and Appointed Officials

BOARD OF DIRECTORS

NAME AND ADDRESS	TITLE	TERM EXPIRES
Erik Nobel 2002 Kimberly Drive Klamath Falls, OR 97603	Chairperson	2023
Sandra Fox 831 Hillside Klamath Falls, OR 97601	Vice-Chairperson	2025
Perry Andrews 6409 Ventura Dr. Klamath Falls, OR 97603	Member	2025
Rolland Bailey 176 Dahlia Klamath Falls, OR 97601	Member	2023
Craig Fleck 1620 Ridgecrest Dr. Klamath Falls, OR 97601	Member	2025
Nora Foster 1864 Etna Street Klamath Falls, OR 97603	Member	2023
Marc Kane 1855 Calhoon Street Klamath Falls, OR 97601	Member	2023

REGISTERED AGENT

Nathan Ratliff
620 Main Street
Klamath Falls, Oregon 97601

GENERAL MANAGER

Adrian Mateos

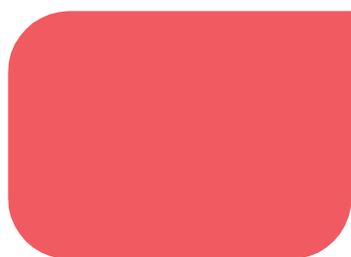
BASIN TRANSIT SERVICE TRANSPORTATION DISTRICT
1130 Adams
Klamath Falls, Oregon 97601

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INDEPENDENT AUDITOR'S REPORT

INDEPENDENT AUDITOR'S REPORT

Board of Directors
Basin Transit Service Transportation District
Klamath Falls, Oregon

Report on the Audit of the Financial Statements

Opinion

We have audited the financial statements of the business-type activities of Basin Transit Service Transportation District (the District), as of and for the year ended June 30, 2023, and the related notes to the financial statements, which collectively comprise the District's basic financial statements as listed in the table of contents.

In our opinion, the accompanying financial statements referred to above present fairly, in all material respects, the respective financial position of the business-type activities of the District, as of June 30, 2023, and the respective changes in financial position, and cash flows thereof, for the year then ended in accordance with accounting principles generally accepted in the United States of America.

Basis for Opinion

We conducted our audit in accordance with auditing standards generally accepted in the United States of America (GAAS) and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States (*Government Auditing Standards*). Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of the District and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Responsibilities of Management for the Financial Statements

Management is responsible for the preparation and fair presentation of the financial statements in accordance with accounting principles generally accepted in the United States of America, and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the District's ability to continue as a going concern for 12 months beyond the financial statement date, including any currently known information that may raise substantial doubt shortly thereafter.

Auditor's Responsibilities for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS and *Government Auditing Standards* will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

In performing an audit in accordance with GAAS and *Government Auditing Standards*, we

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the District's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about the District's ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control-related matters that we identified during the audit.

Required Supplementary Information

Management has omitted the management's discussion and analysis that accounting principles generally accepted in the United States of America require to be presented to supplement the basic financial statements. Such missing information, although not a part of the basic financial statements, is required by the Governmental Accounting Standards Board who considers it to be an essential part of financial reporting for placing the basic financial statements in an appropriate operational, economic, or historical context. Our opinions on the basic financial statements are not affected by this missing information.

Supplementary Information

Our audit was conducted for the purpose of forming an opinion on the financial statements that collectively comprise the District's basic financial statements. The other supplementary information listed in the Table of Contents and the schedule of expenditures of federal awards, as required by Title 2 U.S. Code of Federal Regulations Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* are presented for purposes of additional analysis and are not required as part of the basic financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the basic financial statements. The information has been subjected to the auditing procedures applied in the audit of the basic financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the basic financial statements or to the basic financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the supplementary information and schedule of expenditures of federal awards are fairly stated, in all material respects, in relation to the basic financial statements as a whole.

Other Reporting Required by Government Auditing Standards

In accordance with *Government Auditing Standards*, we have also issued our report dated March 12, 2026 on our consideration of the District's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is solely to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the District's internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the District's internal control over financial reporting and compliance.

Other Reporting Required by the State of Oregon

In accordance with Oregon State Regulations, we have also issued our report dated March 12, 2026 on our consideration of the District's compliance with certain provisions of laws, regulations, contracts, and grants, including the provisions of Oregon Revised Statutes (ORS) as specified in Oregon Administrative Rules 162-010-0000 through 162-010-0330 of the *Minimum Standards for Audits of Oregon Municipal Corporations*. The purpose of that report is to describe the scope of our testing necessary to address the required provisions of ORS, and not to provide an opinion on compliance with such provisions.



Aria Bettinger, CPA, Shareholder
Sorren CPAs, P.C.
Medford, Oregon
March 12, 2026



BASIC FINANCIAL STATEMENTS

**BASIN TRANSIT SERVICE TRANSPORTATION DISTRICT
STATEMENT OF NET POSITION
JUNE 30, 2023**

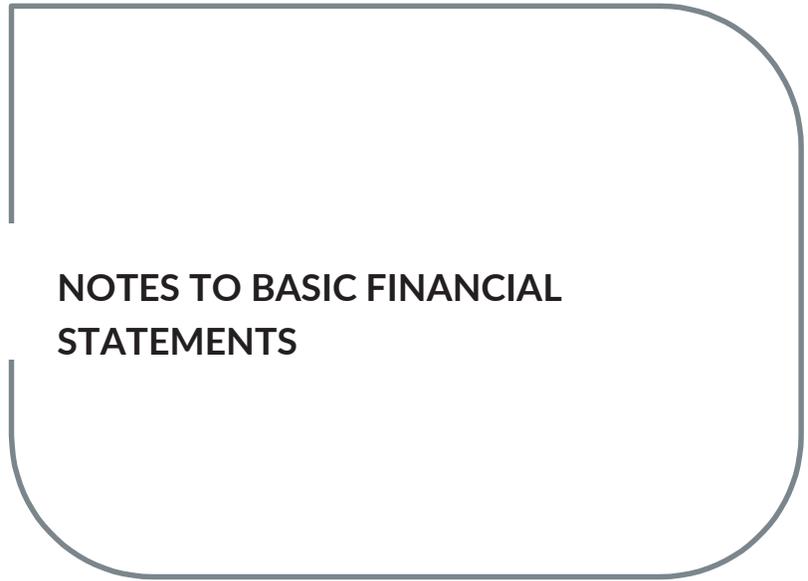
ASSETS:	
Cash and investments	\$ 3,581,871
Receivables:	
Property taxes	114,343
Grants	909,429
Prepays	147,056
Capital assets not being depreciated	158,728
Capital assets being depreciated/amortized, net	<u>1,838,512</u>
TOTAL ASSETS	<u>6,749,939</u>
LIABILITIES:	
Accounts payable	108,156
Accrued payroll and related liabilities	35,748
Accrued vacation and sick leave	163,029
Leases payable, due within one year	<u>2,729</u>
TOTAL LIABILITIES	<u>309,662</u>
NET POSITION:	
Net investment in capital assets	1,994,511
Restricted for transportation programs	1,862,284
Unrestricted	<u>2,583,482</u>
TOTAL NET POSITION	<u><u>\$ 6,440,277</u></u>

**BASIN TRANSIT SERVICE TRANSPORTATION DISTRICT
STATEMENT OF REVENUE, EXPENSE, AND CHANGES IN NET POSITION
YEAR ENDED JUNE 30, 2023**

OPERATING REVENUES:	
Fares	\$ 138,302
Miscellaneous income	<u>21,202</u>
TOTAL OPERATING REVENUES	<u>159,504</u>
OPERATING EXPENSES:	
Personnel services	2,655,704
Materials and services	1,275,762
Depreciation and amortization	<u>390,799</u>
TOTAL OPERATING EXPENSES	<u>4,322,265</u>
OPERATING INCOME (LOSS)	<u>(4,162,761)</u>
NONOPERATING REVENUES (EXPENSES):	
Property taxes	1,440,288
State and federal grants	3,104,085
Interest expense	(162)
Investment earnings	<u>2,340</u>
TOTAL NONOPERATING REVENUES (EXPENSES)	<u>4,546,551</u>
CHANGE IN NET POSITION	383,790
NET POSITION - BEGINNING OF YEAR	<u>6,056,487</u>
NET POSITION - END OF YEAR	<u><u>\$ 6,440,277</u></u>

**BASIN TRANSIT SERVICE TRANSPORTATION DISTRICT
STATEMENT OF CASH FLOWS
YEAR ENDED JUNE 30, 2023**

CASH FLOWS FROM OPERATING ACTIVITIES	
Receipts from customers	\$ 159,504
Payments to employees	(2,650,873)
Payments to suppliers	<u>(1,778,596)</u>
Net cash provided (used) by operating activities	<u>(4,269,965)</u>
CASH FLOWS FROM NONCAPITAL FINANCING ACTIVITIES	
Receipts from property taxes	1,449,200
Receipts from grants	<u>2,898,356</u>
Net cash provided (used) by noncapital financing activities	<u>4,347,556</u>
CASH FLOWS FROM CAPITAL AND RELATED FINANCING ACTIVITIES	
Acquisition and construction of capital assets	(221,844)
Payments on lease payable	(2,864)
Interest paid on leases	<u>(162)</u>
Net cash provided (used) by capital and related financing activities	<u>(224,870)</u>
CASH FLOWS FROM INVESTING ACTIVITIES	
Interest received on investments	<u>2,340</u>
Net cash provided (used) by investing activities	<u>2,340</u>
Net increase (decrease) in cash	(144,939)
Cash and investments at the beginning of the year	<u>3,726,810</u>
Cash and investments at the end of the year	<u><u>\$ 3,581,871</u></u>
Reconciliation of operating income (loss) to net cash used by operating activities:	
Operating income (loss)	\$ (4,162,761)
Adjustments to reconcile operating income to net cash provided by operating activities -	
Depreciation/amortization	390,799
Change in assets and liabilities:	
Prepays	(66,766)
Accounts payable	(436,068)
Accrued payroll and related liabilities	107
Accrued vacation and sick leave	<u>4,724</u>
Net cash provided (used) by operating activities	<u><u>\$ (4,269,965)</u></u>



**NOTES TO BASIC FINANCIAL
STATEMENTS**

**BASIN TRANSIT SERVICE TRANSPORTATION DISTRICT
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED JUNE 30, 2023**

NOTE 1 – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

Reporting Entity

Basin Transit Service Transportation District (the District) is a municipal corporation governed by an elected seven-member board of directors. The District was organized effective July 1, 1981 under the provisions of Oregon Revised Statutes (ORS) Chapter 267 to provide mass transit to the City of Klamath Falls and surrounding area. Under ORS 267 the District is authorized to levy taxes and charge fares to pay for the operations of the District. The District is also authorized to issue general obligation bonds and revenue bonds.

The financial reporting entity as defined by accounting principles generally accepted in the United States of America (GAAP) consists of the District, as well as its components units, which are legally separate organizations for which the elected officials of the District are financially accountable. Financial accountability is defined as (1) appointment of a voting majority of the component unit's board and either (a) the ability to impose will by the District, or (b) the possibility that the component unit will provide a financial benefit to or impose a financial burden on the District or fiscal dependency on the District or (2) fiscal dependency on the District.

Based upon the above criteria, the District does not have any component units that require inclusion in the financial statements. Conversely, the District is not a component unit of another government.

Basis of Presentation and Accounting

The financial statements of the District have been prepared in conformity with generally accepted accounting principles (GAAP) as applied to Government entities. The accounts of the District are organized in a manner similar to a private business enterprise. The financial statements have been prepared using the economic resources measurement focus and accrual basis of accounting in accordance with GAAP. Revenues are recorded when earned and expenses are recorded when a liability is incurred, regardless of the timing of related cash flows. Property taxes are recognized as revenues in the year for which they are levied. Grants and similar items are recognized as revenue as soon as all eligibility requirements imposed by the provider have been met.

Revenue Recognition

Operating revenues consist primarily of passenger fares. The District also recognizes contracted service revenue and transit advertising revenue as operating revenue. Operating expenses include the costs of operating the District, including depreciation on capital assets. All revenues and expenses not meeting this definition are reported as non-operating revenues and expenses.

Restricted Assets

When restricted and unrestricted resources are available for use, it is the District's policy to use restricted resources first, then unrestricted resources as they are needed.

Cash and Investments

The cash and investments reported on the statement of cash flows includes petty cash, checking, savings, and investments in certificate of deposits. Investments are stated at amortized cost, which approximates market value.

**BASIN TRANSIT SERVICE TRANSPORTATION DISTRICT
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED JUNE 30, 2023**

NOTE 1 – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

Capital Assets

Capital assets are stated at cost, except for donated capital assets, which are stated at the fair market value on the date of donation. Expenditures for additions and improvements with a value in excess of \$2,500 and a useful life of more than one year are capitalized. Expenditures for maintenance, repairs, and minor improvements are charged to operations as incurred. Upon disposal of capital assets, the accounts are relieved of the related costs and accumulated depreciation, expenses, and changes in net position.

Capital assets, excluding land and construction in progress, are depreciated using the straight-line method over the estimated useful lives of the assets. Depreciation is an accounting process to allocate the cost of capital assets to expense in a systematic and rational manner to those periods expected to benefit from the use of capital assets.

Capital assets are depreciated with the straight-line method over the following useful lives:

	<u>Estimated Lives (Yrs)</u>
Office equipment	5-7
Radio and shop equipment	5-20
Motorized vehicles	4-12
Bus stops & shelters	5-25
Buildings	35
Right-of-use asset	Depends on life of lease

Revenue rolling stock is depreciated using a range between four to twelve-year life as suggested by the U.S. Government Federal Transit Administration (FTA).

Receivables

Receivables consist primarily of property taxes, and claims for reimbursement of costs under various federal and state grant programs. All amounts are considered to be collectable.

Prepays

Certain payments to vendors reflect costs applicable to future accounting periods and are recorded as prepaid items in the Statement of Net Position.

Leases

The District recognizes a lease liability and an intangible right-to-use lease asset (lease asset) in the basic financial statements. The District recognizes lease liabilities with an initial, annual value of \$2,500 or more. At the commencement of a lease, the District initially measures the lease liability at the present value of payments expected to be made during the lease term. Subsequently, the lease liability is reduced by the principal portion of lease payments made. The lease asset is initially measured as the initial amount of the lease liability, adjusted for lease payments made at or before the lease commencement date, plus certain initial direct costs. Subsequently, the lease asset is amortized on a straight-line basis over its useful life.

**BASIN TRANSIT SERVICE TRANSPORTATION DISTRICT
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED JUNE 30, 2023**

NOTE 1 – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

Leases – Continued

Key estimates and judgments related to leases include how the District determines (1) the discount rate it uses to discount the expected lease payments to present value, (2) lease term, and (3) lease payments. The District uses the interest rate charged by the lessor as the discount rate. When the interest rate charged by the lessor is not provided, the District generally uses its estimated incremental borrowing rate as the discount rate for leases. The lease term includes the non-cancellable period of the lease. Lease payments included in the measurement of the lease liability are composed of fixed payments and purchase option price (if applicable) that the District is reasonably certain to exercise.

The District monitors changes in circumstances that would require a remeasurement of its lease and will remeasure the lease asset and liability if certain changes occur that are expected to significantly affect the amount of the lease liability.

Vacation and Sick Pay

The liability for vested or accumulated leave pay is recorded as the benefits accrue to employees. Regular full-time employees shall accrue vacation based upon length of employment. Unused vacation time may be accumulated in a maximum amount of 336 hours. Accrued vacation benefits shall be paid upon termination of employment. Regular full-time employees will receive paid sick leave at the rate of eight hours for each full month they receive at least 130 hours of compensation, up to six months' salary. Additionally, regular part-time employees will be front loaded at 48 hours at the beginning of each calendar year and may carry over up to 48 hours of unused sick leave into the next year for a total of 96 hours each year. Unused sick leave shall be paid out between 50-100% to eligible employees under certain qualifying conditions. Unpaid vacation and sick pay eligible to be paid out are recorded as a liability on the Statement of Net Position.

Net Position

In the Statement of Net Position, equity is classified as net position and displayed in three components:

Net investment in capital assets - consists of net capital assets reduced by outstanding balances of any related debt obligations and deferred inflows of resources attributable to the acquisition, construction, or improvement of those assets and increased by balances of deferred outflows of resources related to those assets.

Restricted net position - consists of net position with constraints placed on the use by either (1) external groups such as creditors, grantors, contributors, or laws and regulations of other governments; or (2) law through constitutional provisions or enabling legislation. Restricted net position is reduced by liabilities and deferred inflows of resources related to the restricted assets.

Unrestricted net position (deficit) - consists of all other net position that does not meet the definition of the above two components and is available for general use by the District.

Use of Estimates

The preparation of financial statements, in conformity with generally accepted accounting principles in the United States of America, requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements and the reported amounts of revenues and expenses during the reporting period. Actual results could differ from those estimates.

**BASIN TRANSIT SERVICE TRANSPORTATION DISTRICT
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED JUNE 30, 2023**

NOTE 1 – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

Adoption of New GASB Pronouncements

During the fiscal year ended June 30, 2023, the District implemented the following GASB Pronouncements:

GASB Statement No. 91, *Conduit Debt Obligations*. The primary objectives of this Statement are to provide a single method of reporting conduit debt obligations by issuers and eliminate diversity in practice associated with (1) commitments extended by issuers, (2) arrangements associated with conduit debt obligations, and (3) related note disclosures. There is no effect on the District's financial statements as a result of this Statement.

GASB Statement No. 94, *Public-Private and Public-Private Partnerships and Availability Payment Arrangements*. This Statement's objective is to address accounting and financial reporting for arrangements in which a government contracts with an operator to provide public services by conveying control of the right to operate or use a capital asset for a period of time in an exchange or exchange-like transaction. There is no effect on the District's financial statements as a result of this Statement.

GASB Statement No. 96, *Subscription-Based Information Technology Arrangements*. This Statement's objective is to provide guidance on the accounting and financial reporting for subscription-based information technology arrangements for government end users. The implementation of this pronouncement has no effect on the District's financial statements.

Future GASB Pronouncements

The following GASB pronouncements have been issued, but are not effective as of June 30, 2023:

GASB Statement No. 100, *Accounting Changes and Error Corrections*. This Statement clarifies the presentation and disclosure requirements for prior period adjustments to beginning net position. This Statement will be effective for the District for fiscal year ending June 30, 2024.

GASB Statement No. 101, *Compensated Absences*. Issued in June 2022, this Statement updates recognition and measurement guidelines for compensated absences and is effective for the District for the fiscal year ending June 30, 2025.

GASB Statement No. 102, *Certain Risk Disclosures*. This Statement requires governments to disclose essential information about risks related to vulnerabilities due to certain concentrations or constraints. This Statement will be effective for the District for the fiscal year ending June 30, 2025.

GASB Statement No. 103, *Financial Reporting Model Improvements*. The objective of this Statement is to improve key components of the financial reporting model to enhance its effectiveness in providing information that is essential for decision making and assessing a government's accountability. This Statement also addresses certain application issues. This Statement will be effective for the District for the fiscal year ending June 30, 2026.

GASB Statement No. 104, *Disclosure of Certain Assets*. This statement requires certain types of capital assets to be disclosed separately in the capital assets note disclosures, requires certain intangible assets to be disclosed separately by major class, and requires additional disclosures for capital assets held for sale. This Statement also addresses certain application issues. This Statement will be effective for the District for the fiscal year ending June 30, 2026.

GASB Statement No. 105, *Subsequent Events*. Issued in December 2025, this Statement improves financial reporting requirements for subsequent events. This Statement will be effective for the District for the fiscal year ending June 30, 2026.

The District is currently evaluating whether or not the above listed new GASB pronouncements will have a significant impact to the District's financial statements.

**BASIN TRANSIT SERVICE TRANSPORTATION DISTRICT
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED JUNE 30, 2023**

NOTE 2 – APPROPRIATION AND BUDGETARY CONTROLS

For financial reporting and operating purposes, the District considers its activities as those of a unitary enterprise operation (proprietary fund). Therefore, these activities are reported in a single enterprise fund. However, for legal requirements as set forth in the Oregon Local Budget Law, the District prepares and adopts a budget on the modified accrual basis of accounting. The major differences between the budgetary and GAAP basis of accounting are that capital outlay and other long-term assets and debt principal and other long-term liabilities are included as budgeted expenditures on the budgetary basis. The resolution authorizing appropriations for this fund sets the level by which expenditures cannot legally exceed appropriations. The detail budget document, however, is required to contain more specific, detailed information for the above-mentioned expense categories. All appropriations lapse at the end of each fiscal year.

The District uses the following budgetary funds to account for its activities:

General Fund: This fund accounts for the financial resources of the District that are not accounted for in any other fund. Principal sources of revenue are: property taxes, passenger fares, advertising and special services, federal and state operating assistance, and interest. Primary expenditures are for personnel services, materials and services, insurance, and interfund transfers to support special transportation and capital acquisition programs.

Special Transportation Fund: This fund is used to account for the financial resources received primarily from state grants restricted to use for accessible services programs, primarily for seniors and persons with disabilities that complement regular fixed-route service. Primary revenue sources include: State of Oregon Special Transportation Funds (STF), and interfund transfers from the General Fund. Primary expenditures are for contract services, program administration, and interfund transfers of local match funds for program capital asset acquisition.

Special Transportation Improvement Fund: This fund is used to fund public transportation improvements across Oregon. Special Transportation Improvement Funds (STIF) may be used for public transportation purposes that support the effective planning, deployment, operation, and administration of public transportation programs. STIF funds are not intended to supplant local funding sources to maintain existing services. STIF funds help support reduced-fare programs, expanded service coverage, and increased service frequency to low-income communities. This program has advanced greenhouse gas emission reduction efforts by finding the transition to low-emission vehicles. Funds have also supported expanded connectivity across Oregon's multimodal network through transit service, infrastructure, and technology improvements.

Capital Reserve Fund: This fund is used to account for financial resources to be used for the acquisition or construction of capital assets. The primary revenue sources are federal and state grants and transfers from the General Fund and Special Transportation fund.

Unexpected additional resources or appropriations may be added to the budget through the use of a supplemental budget. Original and supplemental budgets require budget hearings before the public, publications in newspapers, and approval by the District. Original and supplemental budgets may be modified during the fiscal year by the use of appropriations transfers between the levels of control. Such transfers required approval by passing a District resolution authorizing the transfer. All budget amendments are subject to the limitations put forth in the Oregon Revised Statutes Chapters 294.305 through 294.565 (Oregon Budget Law).

During the fiscal year ended June 30, 2023, the District was in compliance with Local Budget Law, except as follows:

The District's FY24 budgeted transfers in did not equal budgeted transfers out.

**BASIN TRANSIT SERVICE TRANSPORTATION DISTRICT
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED JUNE 30, 2023**

NOTE 3 – CASH AND INVESTMENTS

Cash and investments at June 30, 2023, consisted of the following:

Cash on hand	\$	125
Demand deposits		3,260,857
Certificates of deposit		320,889
Total cash and investments	\$	<u>3,581,871</u>

Custodial Credit Risk - Custodial credit risk is the risk that in the event of a bank failure, the District's deposits may not be returned to it. The District does not have a formal deposit policy for custodial credit risk. At June 30, 2023, the District's deposits with various financial institutions had a bank value of \$3,603,106. All deposits not covered by FDIC insurance are covered by the Public Funds Collateralization Program (PFCP) of the State of Oregon. The PFCP is a shared liability structure for participating bank depositories. Barring any exceptions, a bank depository is required to pledge collateral valued at least 10% of their quarter-end public fund deposits if they are well capitalized, 25% of their quarter-end public fund deposits if they are adequately capitalized, or 110% of their quarter-end public fund deposits if they are undercapitalized or assigned to pledge 110% by the Office of State Treasurer. In the event of a bank failure, the entire pool of collateral pledged by all qualified Oregon public funds bank depositories is available to repay deposits of public funds of government entities.

Credit Risk - State Statutes authorize the District to invest primarily in general obligations of the U.S. Government and its agencies, certain bonded obligations of Oregon municipalities, bank repurchase agreements, time certificates of deposit, banker's acceptances, certain commercial papers, and the State Treasurer's Investment Pool, among others. The District does not have a formal investment policy that provides additional restrictions on its investment choices.

Concentration of Credit Risk - The District is required to provide information about the concentration of credit risk associated with its investments in one issuer that represents 5 percent or more of the total investments, excluding investments in external investment pools or those issued and explicitly guaranteed by the U.S. Government. The District has no such investments.

Interest Rate Risk - The District has no formal investment policy that explicitly limits investment maturities as a means of managing its exposure to fair value loss arising from increasing interest rates.

**BASIN TRANSIT SERVICE TRANSPORTATION DISTRICT
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED JUNE 30, 2023**

NOTE 4 – CAPITAL ASSETS

The following is a summary of changes in capital assets for the year ended June 30, 2023:

	Beginning Balance	Additions	Transfers/ Deletions	Ending Balance
Capital assets not being depreciated/amortized:				
Land	\$ 104,386	\$ -	\$ -	\$ 104,386
Construction in progress	9,477	44,865	-	54,342
Total capital assets not being depreciated/amortized	113,863	44,865	-	158,728
Capital assets being depreciated/amortized:				
Bus stops & shelters	290,237	-	-	290,237
Buildings	936,932	2,571	-	939,503
Motorized vehicles	3,267,991	164,742	(21,199)	3,411,534
Office equipment	97,412	-	-	97,412
PC & communications equipment	91,654	3,159	-	94,813
Shop equipment	308,416	6,507	-	314,923
Right-of-use	8,373	-	-	8,373
Total capital assets being depreciated/amortized	5,001,015	176,979	(21,199)	5,156,795
Less accumulated depreciation/amortization for:				
Bus stops & shelters	(216,699)	(12,383)	-	(229,082)
Buildings	(551,594)	(14,098)	-	(565,692)
Motorized vehicles	(1,918,660)	(319,510)	21,199	(2,216,971)
Office equipment	(43,905)	(10,362)	-	(54,267)
PC & communications equipment	(45,358)	(10,284)	-	(55,642)
Shop equipment	(169,512)	(21,207)	-	(190,719)
Right-of-use	(2,955)	(2,955)	-	(5,910)
Total accumulated depreciation/amortization	(2,948,683)	(390,799)	21,199	(3,318,283)
Total capital assets being depreciated/amortized, net	2,052,332	(213,820)	-	1,838,512
Total capital assets, net	\$ 2,166,195	\$ (168,955)	\$ -	\$ 1,997,240

Right-of-Use Assets

A lease is defined as a contract that conveys control of the right of use of another entity's nonfinancial asset as specified in a contract for a period of time in an exchange or exchange-like transaction. The District is party to a lease contract as lessee for which this right-of-use (ROU) has been recognized as an asset on the balance sheet. Further information on these transactions can be found in *Note 6*.

NOTE 5 – COMPENSATED ABSENCES

The following is a summary of changes in accrued compensated absences for the year ended June 30, 2023:

Balance at July 1, 2022	Additions	Deductions	Balance at June 30, 2023	Due within one year
<u>\$ 158,305</u>	<u>\$ 217,474</u>	<u>\$ (212,750)</u>	<u>\$ 163,029</u>	<u>\$ 163,029</u>

**BASIN TRANSIT SERVICE TRANSPORTATION DISTRICT
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED JUNE 30, 2023**

NOTE 6 – LEASES PAYABLE

The District is the lessee under one non-cancellable operating lease agreement related to a copier through May of 2024. Monthly payments for the current year are \$253 with an interest rate of 4%.

During the year ended June 30, 2023, lease principal and interest payments of \$2,864 and \$162 were made, respectively. Future maturities of leases payable at June 30, 2023 consisted of the following:

Fiscal Year Ending June 30,	Principal	Interest	Total
2024	\$ 2,729	\$ 55	\$ 2,784
Total	\$ 2,729	\$ 55	\$ 2,784

Changes in leases payable for the year ended June 30, 2023 are as follows:

Balance at June 30, 2022	Additions	Reductions	Balance at June 30, 2023	Due in one year
\$ 5,593	\$ -	\$ 2,864	\$ 2,729	\$ 2,729

NOTE 7 – RISK MANAGEMENT

The District is exposed to various risks of loss related to torts, theft of, damage to and destruction of assets, errors and omissions, injuries to employees and natural disasters for which the District carries commercial insurance to minimize exposure to these risks.

NOTE 8 – DEFERRED COMPENSATION PLAN

The District contributes to the Basin Transit Service Transportation District 401(a) Plan, a self-administered deferred compensation plan for all employees which is a qualified plan under Internal Revenue Code Section (a). The plan is a single-employer plan that provides retirement and death benefits to Plan members and beneficiaries. The plan's investments are self-directed by participants and the plan does not issue financial reports for the plan. The District has elected a flexible discretionary match. District contributions for the year ended June 30, 2023 were \$55,578.

NOTE 9 – OTHER POST-EMPLOYMENT BENEFITS

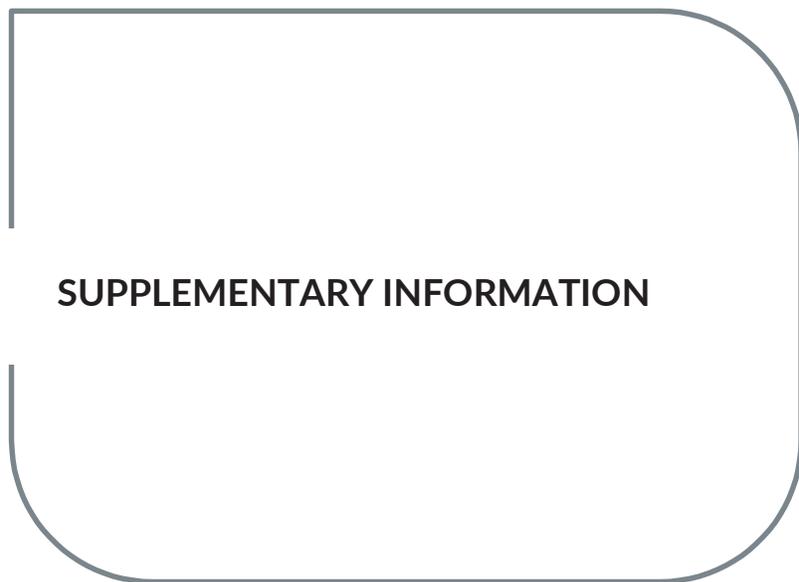
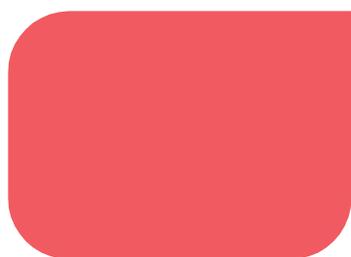
The District does not have a formal post-employment benefits (OPEB) plan for any employee groups. The District is required by Oregon Revised Statutes 243.303 to offer retirees with group health insurance from the date of retirement to age 65 at the same rate provided to current employees. For the year ended June 30, 2023, the District did not provide retirement or healthcare benefits to its retirees.

NOTE 10 – CONTINGENCIES

Under the terms of federal and state grants, periodic audits are required, and costs may be questioned as not being appropriate under the terms of the grants. Such audits could lead to reimbursement to the grantor agencies. District management believes disallowance, if any, will be immaterial.

NOTE 11 – SUBSEQUENT EVENTS

Management of the District has evaluated events and transactions occurring after June 30, 2023, up through the date of the financial statements were available to be issued, for recognition and/or disclosure in the financial statements.



SUPPLEMENTARY INFORMATION

**BASIN TRANSIT SERVICE TRANSPORTATION DISTRICT
SCHEDULE OF REVENUES, EXPENDITURES, AND CHANGES IN FUND BALANCE
BUDGET AND ACTUAL - BUDGET BASIS
GENERAL FUND
YEAR ENDED JUNE 30, 2023**

	Budget		Actual	Variance with
	Adopted	Final		Final Budget Positive (Negative)
REVENUES:				
Property taxes	\$ 1,421,043	\$ 1,421,043	\$ 1,445,714	\$ 24,671
Public transit assistance	145,000	145,000	155,777	10,777
Federal grants	1,692,657	1,692,657	1,800,853	108,196
State grants	47,030	47,030	28,253	(18,777)
Fares	106,500	106,500	138,302	31,802
Advertising	61,000	61,000	1,274	(59,726)
Interest	325	325	-	(325)
Miscellaneous	9,700	9,700	19,928	10,228
TOTAL REVENUES	<u>3,483,255</u>	<u>3,483,255</u>	<u>3,590,101</u>	<u>106,846</u>
EXPENDITURES:				
Current:				
Personnel services	2,800,128	2,800,128	2,650,980	149,148
Materials and services	1,675,152	1,675,152	1,214,943	460,209
Capital outlay	675,686	675,686	221,844	453,842
Contingency	75,000	75,000	-	75,000
TOTAL EXPENDITURES	<u>5,225,966</u>	<u>5,225,966</u>	<u>4,087,767</u>	<u>1,138,199</u>
EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES	<u>(1,742,711)</u>	<u>(1,742,711)</u>	<u>(497,666)</u>	<u>1,245,045</u>
OTHER FINANCING SOURCES (USES):				
Transfer in	1,493,510	1,493,510	896,006	(597,504)
TOTAL OTHER FINANCING SOURCES (USES)	<u>1,493,510</u>	<u>1,493,510</u>	<u>896,006</u>	<u>(597,504)</u>
CHANGE IN FUND BALANCE	(249,201)	(249,201)	398,340	647,541
FUND BALANCE - BEGINNING OF YEAR	<u>1,669,435</u>	<u>1,669,435</u>	<u>1,826,637</u>	<u>157,202</u>
FUND BALANCE - END OF YEAR	<u>\$ 1,420,234</u>	<u>\$ 1,420,234</u>	<u>\$ 2,224,977</u>	<u>\$ 804,743</u>

**BASIN TRANSIT SERVICE TRANSPORTATION DISTRICT
SCHEDULE OF REVENUES, EXPENDITURES, AND CHANGES IN FUND BALANCE
BUDGET AND ACTUAL - BUDGET BASIS
SPECIAL TRANSPORTATION FUND
YEAR ENDED JUNE 30, 2023**

	Budget		Actual	Variance with Final Budget Positive (Negative)
	Adopted	Final		
REVENUES:				
STF special transportation fund	\$ 162,172	\$ 162,172	\$ 159,660	\$ (2,512)
Interest	-	-	87	87
TOTAL REVENUES	<u>162,172</u>	<u>162,172</u>	<u>159,747</u>	<u>(2,425)</u>
EXPENDITURES:				
Current:				
Material and services	124,256	124,256	63,845	60,411
TOTAL EXPENDITURES	<u>124,256</u>	<u>124,256</u>	<u>63,845</u>	<u>60,411</u>
EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES	<u>37,916</u>	<u>37,916</u>	<u>95,902</u>	<u>57,986</u>
OTHER FINANCING SOURCES (USES):				
Transfers out	(111,795)	(111,795)	(44,928)	66,867
TOTAL OTHER FINANCING SOURCES (USES)	<u>(111,795)</u>	<u>(111,795)</u>	<u>(44,928)</u>	<u>66,867</u>
CHANGE IN FUND BALANCE	(73,879)	(73,879)	50,974	124,853
FUND BALANCE - BEGINNING OF YEAR	<u>207,227</u>	<u>207,227</u>	<u>155,184</u>	<u>(52,043)</u>
FUND BALANCE - END OF YEAR	<u>\$ 133,348</u>	<u>\$ 133,348</u>	<u>\$ 206,158</u>	<u>\$ 72,810</u>

**BASIN TRANSIT SERVICE TRANSPORTATION DISTRICT
SCHEDULE OF REVENUES, EXPENDITURES, AND CHANGES IN FUND BALANCE
BUDGET AND ACTUAL - BUDGET BASIS
SPECIAL TRANSPORTATION IMPROVEMENT FUND
YEAR ENDED JUNE 30, 2023**

	Budget		Actual	Variance with Final Budget Positive (Negative)
	Adopted	Final		
REVENUES:				
STIF special transportation funds	\$ 904,444	\$ 904,444	\$ 959,542	\$ 55,098
Interest	-	-	350	350
TOTAL REVENUES	<u>904,444</u>	<u>904,444</u>	<u>959,892</u>	<u>55,448</u>
OTHER FINANCING SOURCES (USES):				
Transfers out	<u>(1,381,715)</u>	<u>(1,381,715)</u>	<u>(851,078)</u>	<u>530,637</u>
CHANGE IN FUND BALANCE	(477,271)	(477,271)	108,814	586,085
FUND BALANCE - BEGINNING OF YEAR	<u>2,070,884</u>	<u>2,070,884</u>	<u>1,753,470</u>	<u>(317,414)</u>
FUND BALANCE - END OF YEAR	<u>\$ 1,593,613</u>	<u>\$ 1,593,613</u>	<u>\$ 1,862,284</u>	<u>\$ 268,671</u>

**BASIN TRANSIT SERVICE TRANSPORTATION DISTRICT
SCHEDULE OF REVENUES, EXPENDITURES, AND CHANGES IN FUND BALANCE
BUDGET AND ACTUAL - BUDGET BASIS
CAPITAL RESERVE FUND
YEAR ENDED JUNE 30, 2023**

	Budget		Actual	Variance with Final Budget Positive (Negative)
	Adopted	Final		
REVENUES:				
Interest	\$ 3,859	\$ 3,859	\$ 1,903	\$ (1,956)
TOTAL REVENUES	<u>3,859</u>	<u>3,859</u>	<u>1,903</u>	<u>(1,956)</u>
CHANGE IN FUND BALANCE	3,859	3,859	1,903	1,956
FUND BALANCE - BEGINNING OF YEAR	<u>318,218</u>	<u>318,218</u>	<u>318,899</u>	<u>681</u>
FUND BALANCE- END OF YEAR	<u>\$ 322,077</u>	<u>\$ 322,077</u>	<u>\$ 320,802</u>	<u>\$ (1,275)</u>

**BASIN TRANSIT SERVICE TRANSPORTATION DISTRICT
RECONCILIATION OF NON-GAAP BUDGETARY BASIS TO GAAP BASIS
YEAR ENDED JUNE 30, 2023**

Reconciliation of Change in Fund Balance to Change in Net Position

Net change in fund balance:	
General fund	\$ 398,340
Special revenue fund - special transportation fund	50,974
Special revenue fund - special transportation improvement fund	108,814
Capital reserve fund	<u>1,903</u>
Total change in fund balance	560,031
GAAP basis adjustments:	
Depreciation and amortization	(390,799)
Capital outlay	221,844
Property taxes accrual	(5,426)
Lease liability adjustment	2,864
Vacation and sick leave	<u>(4,724)</u>
Change in net position	<u><u>\$ 383,790</u></u>

Reconciliation of Ending Fund Balance to Ending Net Position

Fund balance:	
General fund	\$ 2,224,977
Special revenue fund - special transportation fund	206,158
Special revenue fund - special transportation improvement fund	1,862,284
Capital reserve fund	<u>320,802</u>
Total fund balance	4,614,221
Add (deduct) adjustments to budgetary working capital to reconcile ending net position	
Capital assets, net	1,997,240
Compensated absences	(163,029)
Property taxes accrual	(5,426)
Lease liability	<u>(2,729)</u>
Ending Net Position	<u><u>\$ 6,440,277</u></u>



**INDEPENDENT AUDITOR'S REPORT
REQUIRED BY OREGON STATE
REGULATIONS**

INDEPENDENT AUDITOR'S REPORT REQUIRED BY OREGON STATE REGULATIONS

To the Board of Directors
Basin Transit Service Transportation District
1130 Adams Street
Klamath Falls, OR 97601

We have audited the basic financial statements of Basin Transit Service Transportation District (the District) as of and for the year ended June 30, 2023, and have issued our report thereon dated March 12, 2026. We conducted our audit in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States.

Compliance

As part of obtaining reasonable assurance about whether the District's financial statements are free of material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grants, including the provisions of Oregon Revised Statutes as specified in Oregon Administrative Rules 162-10-0000 through 162-10-0330 of the *Minimum Standards for Audits of Oregon Municipal Corporations*, noncompliance with which could have a direct and material effect on the determination of financial statement amounts. However, providing an opinion on compliance with those provisions was not the objective of our audit, and accordingly, we do not express such an opinion.

We performed procedures to the extent we considered necessary to address the required comments and disclosures but were not limited to the following:

- Deposit of public funds with financial institutions under ORS Chapter 295.
- Indebtedness limitations, restrictions and repayment
- Insurance and fidelity under bonds in force or required by law.
- Programs funded from outside sources.
- Investments of surplus funds authorized under ORS Chapter 294.
- Public contracts and purchasing under ORS Chapters 279A, 279B, 279C.
- Budgets legally required under ORS Chapter 294.

In connection with our audit, nothing came to our attention that caused us to believe the District was not in substantial compliance with certain provisions of laws, regulations, contracts, and grants, including the provisions of Oregon Revised Statutes as specified in Oregon Administration Rules 162-010-0000 through 162-010-0330 of the *Minimum Standards for Audits of Oregon Municipal Corporations*, except as noted in Note 2 of the financial statements. In addition, the District did not submit the required audit report to the Oregon Secretary of State Audit Division in a timely manner as required by OAR 162-010-0330.

OAR 162-010-0230 Internal Control

In planning and performing our audit, we considered the District's internal control over financial reporting (internal control) to determine the audit procedures that are appropriate in the circumstances for the purpose of expressing our opinions on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the District's internal control over financial reporting. Accordingly, we do not express an opinion on the effectiveness of the District's internal control over financial reporting.

A deficiency in internal control exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, misstatements on a timely basis. A *material weakness* is a deficiency, or a combination of deficiencies, in internal control such that there is a reasonable possibility that a material misstatement of the entity's financial statements will not be prevented, or detected and corrected, on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

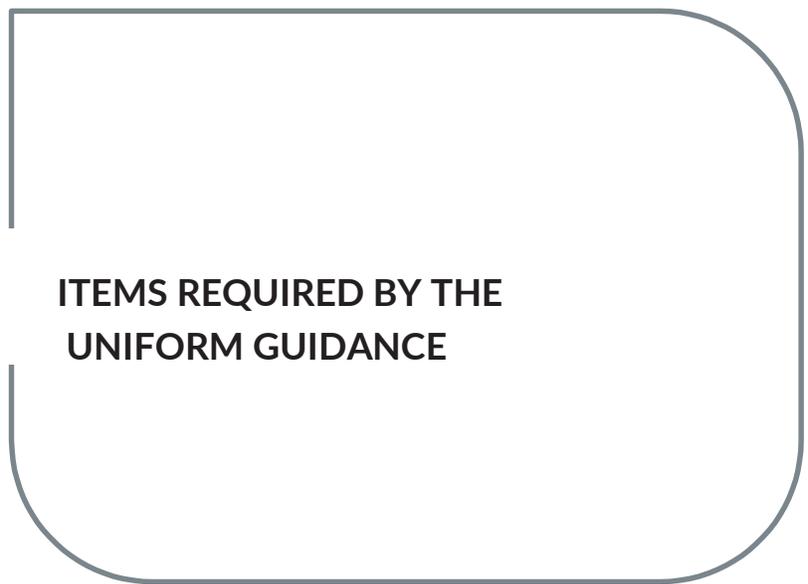
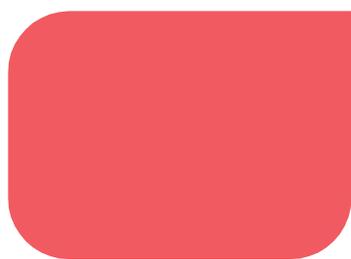
Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies and therefore, material weaknesses or significant deficiencies may exist that were not identified. We identified certain deficiencies in internal control, described in the accompanying schedule of findings and questioned costs as item 2023-001 that we consider to be a material weakness.

Restrictions on Use

This report is intended solely for the information and use of the Board of Directors and management of Basin Transit Service Transportation District and the State of Oregon, Division of Audits and is not intended to be and should not be used by anyone other than these specified parties.



Aria Bettinger CPA, Shareholder
Sorren CPAs, P.C.
Medford, Oregon
March 12, 2026



**ITEMS REQUIRED BY THE
UNIFORM GUIDANCE**

**INDEPENDENT AUDITOR'S REPORT ON INTERNAL CONTROL OVER FINANCIAL REPORTING
AND ON COMPLIANCE AND OTHER MATTERS BASED ON AN AUDIT OF FINANCIAL
STATEMENTS PERFORMED IN ACCORDANCE WITH GOVERNMENT AUDITING STANDARDS**

Board of Directors
Basin Transit Service Transportation District
Klamath Falls, Oregon

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States (*Government Auditing Standards*), the financial statements of the business-type activities of Basin Transit Service Transportation District (the District), as of and for the year ended June 30, 2023, and the related notes to the financial statements, which collectively comprise the District's basic financial statements, and have issued our report thereon dated March 12, 2026.

Report on Internal Control Over Financial Reporting

In planning and performing our audit of the financial statements, we considered the District's internal control over financial reporting (internal control) as a basis for designing audit procedures that are appropriate in the circumstances for the purpose of expressing our opinions on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the District's internal control. Accordingly, we do not express an opinion on the effectiveness of the District's internal control.

A deficiency in internal control exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, misstatements on a timely basis. A *material weakness* is a deficiency, or a combination of deficiencies, in internal control such that there is a reasonable possibility that a material misstatement of the entity's financial statements will not be prevented, or detected and corrected, on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies and therefore, material weaknesses or significant deficiencies may exist that were not identified. We identified certain deficiencies in internal controls, described in the accompanying schedule of findings and questioned costs as item 2023-001 that we consider to be a material weakness.

Report on Compliance and Other Matters

As part of obtaining reasonable assurance about whether the District's financial statements are free of material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts and grant agreements, noncompliance with which could have a direct and material effect on the financial statements. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

District's Response to Findings

Government Auditing Standards requires the auditor to perform limited procedures on the District's response to the findings identified in our audit and described in the accompanying schedule of findings and questioned costs. The District's response was not subjected to the other auditing procedures applied in the audit of the financial statements and, accordingly, we express no opinion on the response.

Purpose of this Report

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the District's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the entity's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.



Aria Bettinger, CPA, Shareholder
Sorren CPAs, P.C.
Medford, Oregon
March 12, 2026

INDEPENDENT AUDITOR'S REPORT ON COMPLIANCE FOR EACH MAJOR FEDERAL PROGRAM AND ON INTERNAL CONTROL OVER COMPLIANCE REQUIRED BY THE UNIFORM GUIDANCE

Board of Directors
Basin Transit Service Transportation District
Klamath Falls, Oregon

Report on Compliance for Each Major Federal Program

Opinion on Major Federal Program

We have audited Basin Transit Service Transportation District's (the District) compliance with the types of compliance requirements described in the *OMB Compliance Supplement* that could have a direct and material effect on the District's major federal programs for the year ended June 30, 2023. The District's major federal program is identified in the summary of auditor's result section of the accompanying schedule of findings and questioned costs.

Qualified Opinion on Formula Grants for Rural Areas

In our opinion, except for the noncompliance described in the Basis for Qualified Opinion section of our report, the District complied, in all material respects with the compliance requirements referred to above that could have a direct and material effect on Formula Grants for Rural Areas program for the year ended June 30, 2023.

Basis for Qualified Opinion

We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America; the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States (*Government Auditing Standards*) and the audit requirements of Title 2 U.S. *Code of Federal Regulations Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance). Our responsibilities under those standards and the Uniform Guidance are further described in the Auditor's Responsibilities for the Audit of Compliance section of our report.

We are required to be independent of the District and to meet our other ethical responsibilities, in accordance with relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion on compliance for the major federal program. Our audit does not provide a legal determination of the District's compliance with the compliance requirements referred to above.

Matter Giving Rise to Qualified Opinion on Formula Grants for Rural Areas

As described in the accompanying schedule of findings and questioned costs, the District did not comply with requirements regarding Formula Grants for Rural Areas as described in finding number 2023-002 for Equipment and Real Property. Compliance with such requirements is necessary, in our opinion, for the District to comply with the requirements applicable to that program.

Responsibilities of Management for Compliance

Management is responsible for compliance with the requirements referred to above and for the design, implementation, and maintenance of effective internal control over compliance with the requirements of laws, statutes, regulations, rules, and provisions of contracts or grant agreements applicable to the District's federal programs.

Auditor's Responsibilities for the Audit of Compliance

Our objectives are to obtain reasonable assurance about whether material noncompliance with the compliance requirements referred to above occurred, whether due to fraud or error, and express an opinion on the District's compliance based on our audit. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with generally accepted auditing standards, *Government Auditing Standards*, and the Uniform Guidance will always detect material noncompliance when it exists. The risk of not detecting material noncompliance resulting from fraud is higher than for that resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Noncompliance with the compliance requirements referred to above is considered material if there is a substantial likelihood that, individually or in the aggregate, it would influence the judgment made by a reasonable user of the report on compliance about the District's compliance with the requirements of the major federal program as a whole.

In performing an audit in accordance with GAAS, *Government Auditing Standards*, and the Uniform Guidance, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material noncompliance, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the District's compliance with the compliance requirements referred to above and performing such other procedures as we considered necessary in the circumstances.
- Obtain an understanding of the District's internal control over compliance relevant to the audit in order to design audit procedures that are appropriate in the circumstances and to test and report on internal control over compliance in accordance with the Uniform Guidance, but not for the purpose of expressing an opinion on the effectiveness of the District's internal control over compliance. Accordingly, no such opinion is expressed.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit and any significant deficiencies and material weaknesses in internal control over compliance that we identified during the audit.

Other Matters

Government Auditing Standards requires the auditor to perform limited procedures on the District's response to the noncompliance findings identified in our compliance audit described in the accompanying schedule of findings and questioned costs. The District's response was not subjected to the other auditing procedures applied in the audit of compliance and, accordingly, we express no opinion on the response.

Report on Internal Control over Compliance

Our consideration of internal control over compliance was for the limited purpose described in the Auditor's Responsibilities for the Audit of Compliance section above and was not designed to identify all deficiencies in internal control over compliance that might be material weaknesses or significant deficiencies in internal control over compliance and therefore, material weaknesses or significant deficiencies may exist that were not identified. However, as discussed below, we did identify deficiencies in internal control over compliance that we consider to be material weaknesses.

A deficiency in internal control over compliance exists when the design or operation of a control over compliance does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, noncompliance with a type of compliance requirement of a federal program on a timely basis. *A material weakness in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance, such that there is a reasonable possibility that material noncompliance with a type of compliance requirement of a federal program will not be prevented, or detected and corrected, on a timely basis. *A significant deficiency in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance with a type of compliance requirement of a federal program that is less severe than a material weakness in internal control over compliance, yet important enough to merit attention by those charged with governance. We consider the deficiencies in internal control over compliance described in the accompanying schedule of findings and questioned costs as items 2023-002 and 2023-003 to be material weaknesses.

Our audit was not designed for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, no such opinion is expressed.

Government Auditing Standards requires the auditor to perform limited procedures on the District's response to the internal control over compliance findings identified in our compliance audit described in the accompanying schedule of findings and questioned costs. The District's response was not subjected to the other auditing procedures applied in the audit of compliance and, accordingly, we express no opinion on the response.

The purpose of this report on internal control over compliance is solely to describe the scope of our testing of internal controls over compliance and the results of that testing based on the requirements of the Uniform Guidance. Accordingly, this report is not suitable for any other purpose.



Aria Bettinger, CPA, Shareholder
Sorren CPAs, P.C.
Medford, Oregon
March 12, 2026

**BASIN TRANSIT SERVICE TRANSPORTATION DISTRICT
SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS
YEAR ENDED JUNE 30, 2023**

<u>Federal Grantor/Pass-Through Grantor/Program Title</u>	<u>Assistance Listing Number</u>	<u>Pass-Through Grantors Number</u>	<u>Expenditures</u>
U.S Department of Transportation:			
Passed Through Oregon Department of Transportation			
COVID-19 - Formula Grants for Rural Areas	20.509	34693	\$ 96,889
Formula Grants for Rural Areas	20.509	34742	25,828
Formula Grants for Rural Areas	20.509	34983	852,214
COVID-19 - Formula Grants for Rural Areas	20.509	35378	531,143
Total ALN 20.509			<u>1,506,074</u>
Enhanced Mobility of Seniors and Individuals with Disabilities	20.513	35163	276,672
Enhanced Mobility of Seniors and Individuals with Disabilities	20.513	35322	18,107
Total Transit Services Program Cluster			<u>294,779</u>
Total U.S. Department of Transportation			<u>1,800,853</u>
Total Expenditures of Federal Awards			<u>\$ 1,800,853</u>

**BASIN TRANSIT SERVICE TRANSPORTATION DISTRICT
NOTES TO SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS
YEAR ENDED JUNE 30, 2023**

NOTE A – BASIS OF PRESENTATION:

The accompanying schedule of expenditures of federal awards (the Schedule) includes the federal award activity of the Basin Transit Service Transportation District (the District) under programs of the federal government for the year ended June 30, 2023. The information in this Schedule is presented in accordance with the requirements of Title 2 U.S. *Code of Federal Regulations* Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance). Because the Schedule presents only a selected portion of the operations of the District, it is not intended to and does not present the financial position and changes in fund balance of the District.

NOTE B – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES:

Expenditures reported on the Schedule are reported on the accrual basis of accounting. Such expenditures are recognized following the cost principles contained in the Uniform Guidance, wherein certain types of expenditures are not allowable or are limited as to reimbursement.

NOTE C – INDIRECT COST RATE:

The District has not elected to use the 10 percent de minimis indirect cost rate allowed under the Uniform Guidance.

NOTE D – SUBRECIPIENTS:

The District did not have any awards that were passed through to subrecipients for the year ended June 30, 2023.

**BASIN TRANSIT SERVICE TRANSPORTATION DISTRICT
SCHEDULE OF FINDINGS AND QUESTIONED COSTS
YEAR ENDED JUNE 30, 2023**

SECTION I – SUMMARY OF AUDITOR’S RESULTS

Financial Statements

Type of report the auditor issued on whether the financial statements audited were prepared in accordance with GAAP: Unmodified

Internal control over financial reporting:

- Material weakness(es) identified? Yes No
- Significant deficiency(ies) identified? Yes None reported

Noncompliance material to financial statements noted? Yes No

Federal Awards

Internal control over major federal programs:

- Material weakness(es) identified? Yes No
- Significant deficiency(ies) identified? Yes None reported

Type of auditor's report issued on compliance for major federal programs: Qualified

Any audit findings disclosed that are required to be reported in accordance with 2 CFR 200.516(a)? Yes No

Identification of major federal programs:

<u>AL Number(s)</u>	<u>Name of Federal Program or Cluster</u>
20.509	Formula Grants for Rural Areas

Dollar threshold used to distinguish between type A and type B programs: \$750,000

Auditee qualified as a low-risk auditee? Yes No

**BASIN TRANSIT SERVICE TRANSPORTATION DISTRICT
SCHEDULE OF FINDINGS AND QUESTIONED COSTS
YEAR ENDED JUNE 30, 2023**

SECTION II - FINANCIAL STATEMENT FINDINGS

2023-001 – Material Weakness – Segregation of Duties and Oversight

Criteria: Failure of the information and communication component of internal control to provide complete and accurate outputs because of deficiencies in timeliness, resources, and completeness.

Condition: This deficiency results in inadequate entity level controls associated with supervision and review.

Cause: Inadequate segregation of duties within significant processes as well as an accounting department that was not robust enough to support the accounting needs.

Effect or Potential Effect: The potential effect of this material weakness is pervasive (compliance, theft or loss, and lack of monitoring).

Recommendations: We recommend that the District adequately staff the accounting department and segregation of duties and other controls associated with supervision and review are put in place.

Views of Responsible Officials and Planned Corrective Actions: Management agrees with this finding. Management has increased staffing within the accounting department and will properly apply appropriate segregation of duties and sufficient controls to ensure the District's financial statements are correctly reported in a timely manner. In addition, management has implemented enhanced oversight and review procedures, including supervisory review of key accounting processes, periodic reconciliations, and documented approval controls to help ensure transactions are recorded in a timely manner. These measures are designed to strengthen internal controls, improve accountability, and ensure that responsibilities related to financial reporting are appropriately separated among staff. Management will continue to monitor these processes to ensure compliance with established policies and to promote timely preparing and review of financial information while maintaining effective internal control over financial reporting.

Repeat Finding: 2022-001

**BASIN TRANSIT SERVICE TRANSPORTATION DISTRICT
SCHEDULE OF FINDINGS AND QUESTIONED COSTS
YEAR ENDED JUNE 30, 2023**

SECTION III - FINDINGS AND QUESTIONED COSTS - MAJOR FEDERAL AWARD PROGRAMS AUDIT

2023-002 – Equipment and Real Property Management

Finding Type: Material Noncompliance/Material Weakness in Internal Control over Compliance (Equipment and Real Property Management)

Program: Formula Grants for Rural Areas (ALN 20.509)

Criteria: The Uniform Guidance requires a non-federal entity that has expended federal awards for a grant award on or after December 26, 2014 to track equipment acquired with federal funding in its capital asset records.

Condition: Equipment records do not include source of funding which includes the federal award identification number, who holds the title, the federal participation rate, and the location, use and condition of the asset to be in accordance with the Uniform Guidance.

Cause: This condition appears to be the result of a lack of internal controls designed to ensure compliance with Uniform Guidance.

Effect: As a result of this condition, the District did not fully comply with the Uniform Guidance applicable to the above noted grants.

Recommendation: We recommend that the District develop policies to ensure that assets acquired with federal funds are properly identified in capital assets records.

View of Responsible Officials: Management agrees with the recommendation and has developed a procedure to list capital assets that are acquired with federal funds. Management has also developed a policy to ensure that this procedure is followed. In addition, management has established written policies and procedures to track and monitor equipment purchased with federal funding throughout its lifecycle. These procedures include maintaining a detailed inventory record that identifies the funding source, acquisition date, cost, location, and condition of each asset. Management has also implemented periodic inventory reviews and reconciliation processes to ensure that equipment acquired with federal funds is properly recorded, safeguarded, and reported in accordance with applicable federal requirements.

Repeat Finding: 2022-003

**BASIN TRANSIT SERVICE TRANSPORTATION DISTRICT
SCHEDULE OF FINDINGS AND QUESTIONED COSTS
YEAR ENDED JUNE 30, 2023**

**SECTION III - FINDINGS AND QUESTIONED COSTS - MAJOR FEDERAL AWARD PROGRAMS AUDIT
(CONTINUED)**

2023-003 – Procurement, Suspension, and Debarment

Finding Type: Material Weakness in Internal Control over Compliance (Procurement, Suspension, and Debarment)

Program: Formula Grants for Rural Areas (ALN 20.509)

Criteria: The Uniform Guidance requires a non-federal entity that has expended federal awards for a grant award on or after December 26, 2014 to document verification that vendors are in good standing or are not suspended or debarred prior to entering into a covered transaction.

Condition: The District does not have an established policy or procurement protocol in place to ensure vendor verification through one of the three methods defined in federal compliance requirements.

Cause: This condition appears to be the result of a lack of internal controls designed to ensure compliance with Uniform Guidance.

Effect: As a result of this condition, the District did not fully comply with the Uniform Guidance applicable to the above noted grants.

Recommendation: We recommend that the District update their procurement policies and processes to ensure that suspension and debarment compliance requirements are being met and effective internal controls are in place.

View of Responsible Officials: Management agrees with the recommendation and has updated the procurement policies and procedures to verify vendor status of suspension and debarment. In February 2026, management implemented a policy requiring staff to verify that vendors are not suspended or debarred prior to entering into any contract funded with federal funds. In addition, management will document the verification process by retaining evidence of the review, such as confirmation from the appropriate federal databases, in the procurement or contract file. These procedures are intended to ensure compliance with applicable federal regulations and to provide proper documentation demonstrating that vendors have been reviewed and determined to be eligible prior to contract execution.

**BASIN TRANSIT SERVICE TRANSPORTATION DISTRICT
SUMMARY SCHEDULE OF PRIOR YEAR AUDIT FINDINGS
YEAR ENDED JUNE 30, 2023**

FINANCIAL STATEMENT FINDINGS

Finding 2022-001 – Material Weakness – Segregation of Duties and Oversight

Statement of Condition: During the FY22 audit, it was noted that there were inadequate entity level controls associated with supervision and review.

Recommendations: It was recommended the District adequately staff the accounting department that was not robust enough to support the accounting needs.

Current Status: This matter was repeated as finding 2023-001.

Finding 2022-002 – Significant Deficiency – Prior Period Adjustments

Statement of Condition: During the FY22 audit, the District has various incorrect amounts recorded in its June 30, 2021 financial statements.

Recommendations: Management had already taken appropriate action by posting correcting journal entries.

Current Status: This matter was resolved in 2022.

MAJOR FEDERAL AWARD PROGRAMS AUDIT

Finding 2022-003 – Material Noncompliance/Material Weakness – Equipment and Real Property Management

Statement of Condition: During the FY22 audit, it was noted that equipment records did not include source funding (which includes the federal award identification number, who holds the title, the federal participation rate, as well as the location, use, and condition of the asset) to be in accordance with the Uniform Guidance.

Recommendations: It was recommended the District develop policies to ensure that assets acquired with federal funds are properly identified in capital assets records.

Current Status: This matter was repeated as finding 2023-002.

March 12, 2026

Oregon Secretary of State,
Audits Division
255 Capitol St. NE, Suite #500
Salem, OR 97310

Plan of Action for Basin Transit Service Transportation District

Basin Transit Service Transportation District respectfully submits the following corrective action plan in response to deficiencies reported in our audit of fiscal year ended June 30, 2023. The audit was completed by the independent auditing firm Sorren CPAs, P.C. and reported the deficiencies listed below. The plan of action was adopted by the governing body at their meeting on April 1, 2026, as indicated by signatures below.

The deficiencies are listed below, including the adopted plan of action and timeframe.

Financial Statement Finding – Material Weakness

2023-001 Segregation of Duties and Fiduciary Oversight

Condition: This deficiency results in inadequate entity level controls associated with supervision and review.

Cause: Inadequate segregation of duties within significant processes as well as an accounting department that was not robust enough to support the accounting needs.

Auditor Recommendation: We recommend that the District adequately staff the accounting department and segregation of duties and other controls associated with supervision and review are put in place.

Plan of Action:

Date of implementation:

Federal Awards Finding – Material Noncompliance/Material Weakness

2023-002 Equipment and Real Property Management Formula Grants for Rural Areas (ALN#21.509)

Condition: Equipment records do not include the source of funding which includes the federal award identification number, who holds the title, the federal participation rate, and the location, use and condition of the asset to be in accordance with the Uniform Guidance.

Cause: This condition appears to be the result of a lack of internal controls designed to ensure compliance with Uniform Guidance.

Auditor Recommendation: We recommend that the District develop policies to ensure that assets acquired with federal funds are properly identified in capital assets records.

Plan of Action:

Date of implementation:

Federal Awards Finding – Material Weakness

2023-003 – Procurement, Suspension, and Debarment

Condition: The District does not have an established policy or procurement protocol in place to ensure vendor verification through one of the three methods defined in federal compliance requirements.

Cause: This condition appears to be the result of a lack of internal controls designed to ensure compliance with Uniform Guidance.

Auditor Recommendation: We recommend that the District update their procurement policies and processes to ensure that suspension and debarment compliance requirements are being met and effective internal controls are in place.

Plan of Action:

Date of implementation:

If there are any questions regarding this plan, please contact Michelle Carpenter by email at mcarpenter@basintransit.com or by phone at 541-851-2830.

Erick Noble, Board Chair

Signature

Michelle Carpenter, Finance and Grant Manager

Signature

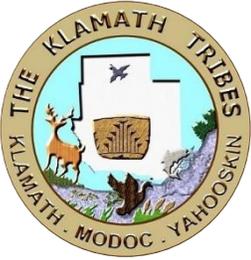
Adriane Mateos, General Manager

Signature



Kittelson & Associates – Miranda Barrus

***Transit Coordinated Human Services
Transportation Plan Final Draft Presentation***



COORDINATED HUMAN SERVICES PUBLIC TRANSPORTATION PLAN

BASIN TRANSIT SERVICE
TRANSPORTATION DISTRICT & THE
KLAMATH TRIBES QUAIL TRAIL PUBLIC
TRANSIT



Klamath County
March 2026



Inside front cover

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COORDINATED HUMAN SERVICES TRANSPORTATION PLAN

BASIN TRANSIT SERVICE TRANSPORTATION DISTRICT & THE KLAMATH TRIBES QUAIL TRAIL PUBLIC TRANSIT

Klamath County

Prepared for:
Basin Transit Service Transportation District and
The Klamath Tribes Quail Trail Public Transit

Prepared by:
Kittelson & Associates, Inc.
851 SW 6th Avenue, Suite 600
Portland, OR 97204
503.228.5230

Project Manager:
Miranda Barrus, PE

Project Principal:
Susan Wright, PE, PMP

Consultant Team:
Katie Popp | Deputy Project Manager
Kacie Schmidt | Transportation Analyst
Christian Watchie | Public Engagement Specialist

Project Number 32070.0
March 16, 2026



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ACKNOWLEDGEMENTS

The time and effort that the Project Management Team, Project Advisory Committee, and community stakeholders devoted to this process was instrumental in updating the Coordinated Human Services Transportation Plan for Klamath County.

Project Management Team

Adrian Mateos, *BTSTD General Manager*

Craig Johnston, *BTSTD Operations Manager*

Michelle Carson, *Quail Trail Public Transit Program Manager*

Project Advisory Committee

Jason Paquette, *The Klamath Tribes*

Jana Degarmo, *The Klamath Tribes*

Ronald Hugulet, *The Klamath Tribes*

Theresa Edwards, *Klamath Basin Senior Citizen's Center*

Wendy Strohkirch, *Oregon Department of Human Services*

Jovi Arellano, *Oregon Department of Transportation*

Amanda Melentine, *Klamath Tribal Health and Family Services*

Mandy Roberson, *Klamath Tribal Health and Family Services*

Paul West, *Disabled American Veterans*

Brion Pinkerton, *US Department of Veterans Affairs*

Jessie Oates, *REACH Inc.*

Sabrina Garcia, *Transformations*

Heidi Gaither, *Klamath County Developmental Disabilities Services*

Jennifer Little, *Klamath County Public Health*

Liz Maddalena, *Klamath Basin Behavioral Health*

Camden Bocchi, *Sky Lakes Medical Center*

Jeremy Morris, *Klamath County Public Works*

Gail Schull, *Klamath Community College*

Klamath Lake Community Action

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APPENDICES

Appendix A: Stakeholder Engagement Memorandum

Appendix B: Existing Services Memorandum

Appendix C: Needs and Opportunities Memorandum

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Section 1 Introduction

Introduction

The Basin Transit Service Transportation District (BTSTD), in partnership with The Klamath Tribes Quail Trail Public Transit, update this Coordinated Human Services Transportation Plan for Klamath County every five years to work towards community mobility goals while also fulfilling state and federal funding requirements. This plan documents the existing public transportation service within Klamath County, identifies public transportation needs for county residents, and outlines strategies to address unmet needs and improve the coordination, efficiency, and access to essential destinations.

The overall goal of the Coordinated Human Services Transportation Plan is to improve mobility for all Klamath County residents, with a focus on target populations including older adults, youth, people living with disabilities, and individuals with low income. The plan helps ensure that those who rely on public transportation have access to medical care, jobs, and other basic services that support quality of life.

The plan is developed in accordance with requirements from the Federal Transit Administration (FTA) and the Oregon Department of Transportation (ODOT). Recipients of FTA Section 5310 (Enhanced Mobility of Seniors and Individuals with Disabilities) program funds and Statewide Transportation Improvement Fund (STIF) funding resources must participate in a coordinated planning process to support coordination between public transportation and human services transportation agencies.

PLAN REQUIREMENTS

ODOT provides the following requirements for Coordinated Human Services Transportation Plans:

- An evaluation of available services that identifies current transportation providers (public, private, and non-profit);
- An assessment of transportation needs for individuals with disabilities, older adults, and people with low incomes. This assessment can be based on the experiences and perceptions of the planning partners or on more sophisticated data collection efforts, and gaps in service [Note: If a community does not intend to seek funding for a particular program (Section 5310, 5311), then the community is not required to include an assessment of the targeted population in its coordinated plan];
- Strategies, activities, and/or projects to address the identified gaps between current services and needs, as well as opportunities to achieve efficiencies in service delivery; and
- Priorities for implementation based on resources (from multiple program sources), time, and feasibility for implementing specific strategies and/or activities identified.

SERVICE AREA

Klamath County (Figure 1) is located in south-central Oregon and is the fourth largest county in the state by area, covering 6,136 square miles. It borders Jackson, Douglas, Lane, Deschutes, and Lake counties, as well as northern California. As of the 2020 Decennial Census, Klamath County has a population of 69,413 and a population density of 11.3 people per square mile. The Klamath Falls urban area holds over 60 percent of the overall population (42,046), followed by Merrill (871), Chiloquin (772), Malin (744), and Bonanza (420). The remaining third of the population is spread across several unincorporated areas of the county. The service area includes the following incorporated cities and census designated places.

Incorporated Cities

- Klamath Falls
- Merrill
- Chiloquin
- Malin
- Bonanza

Census Designated Places

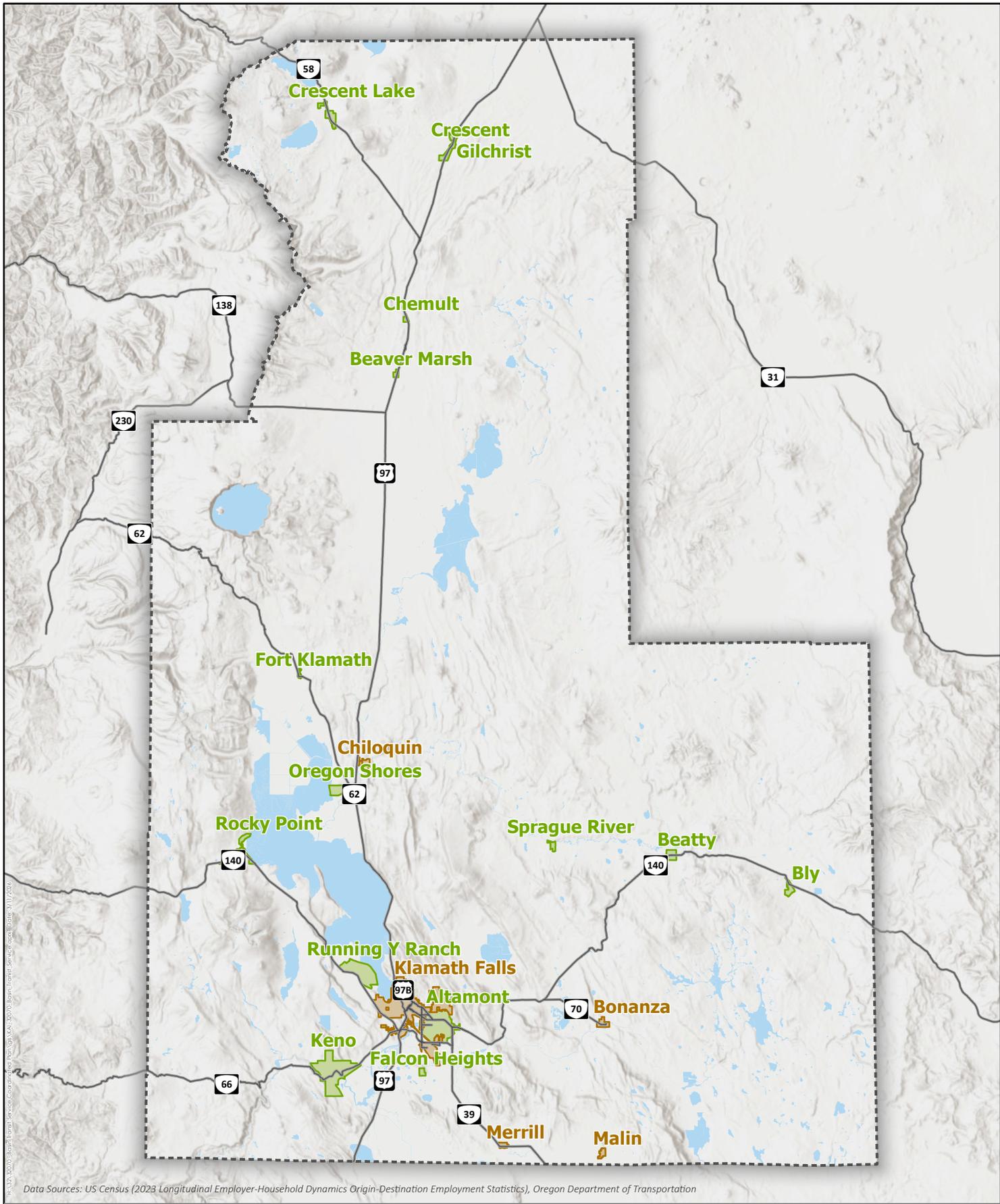
- Beatty
- Beaver Marsh
- Bly
- Chemult
- Crescent
- Crescent Lake
- Falcon Heights
- Fort Klamath
- Gilchrist
- Keno
- Oregon Shores
- Rocky Point
- Running Y Ranch
- Sprague River

Major transportation routes linking Klamath County to its neighboring regions include US 97, providing access north to Bend and south to California; OR 140, which connects west to Medford and east to Lakeview; and OR 58, offering a northwest corridor to Eugene. Additional state highways and their key destinations include OR 138 to Roseburg, OR 62 to Crater Lake, OR 66 to Ashland, OR 39 to Merrill (and Malin by extension), and OR 70 to Bonanza.

DEMOGRAPHIC PROFILE

This Coordinated Human Services Transportation Plan focuses on target populations that are transit dependent, meaning individuals and groups whose mobility is constrained by physical, cognitive, or developmental, financial, or age-related factors and who therefore rely on public transportation or human services transportation to reach essential destinations. These destinations include employment, education, healthcare, social services, and other activities necessary to maintain quality of life.

Title VI of the Civil Rights Act of 1964 prohibits discrimination in the provision of federally supported benefits and services, including public transportation service, and requires agencies to consider how transportation investments affect protected populations. In addition to Title VI populations, this analysis evaluates other demographic groups that are commonly more reliant on transit or have historically experienced barriers to transportation access.



Data Sources: US Census (2023 Longitudinal Employer-Household Dynamics Origin-Destination Employment Statistics), Oregon Department of Transportation

-  County Boundary
-  Incorporated Cities
-  Census Designated Places



Figure 1

Service Area
Klamath County, OR

For the purposes of this plan, transit-dependent populations in Klamath County generally include:

- Persons with disabilities
- Persons with low income
- Youth/high school students
- Older adults
- Racial/ethnic minorities and households with Limited English Proficiency (LEP)
- Persons without access to a vehicle
- Veterans

This section describes these populations across Klamath County, alongside housing and employment patterns to highlight areas where limited transportation options hinder access to jobs and essential services. Demographic data are from the 2023 five-year American Community Survey (ACS). Table 1 presents the distribution of these populations for the state, the county, Klamath Falls, and all Census County Divisions (CCDs)¹. Statistics that are higher compared to state averages are shown as shaded and bold text.

These findings indicate that Klamath County experiences higher overall transportation disadvantage compared to state averages. Needs are both widespread and concentrated in specific sub-areas, particularly where population, economic activity, and community services are clustered. Elevated rates of disability, older adults, veterans, and poverty underscore the importance of maintaining and expanding accessible, affordable transportation options countywide. This information established the baseline for identifying the priority areas, service gaps, and strategies presented in this plan to improve coordination and accessibility across the countywide transportation network.

Oregon Social Equity Index

Identifying where transportation-disadvantaged populations live in Klamath County is essential for understanding current needs and guiding future service planning. Oregon's [Social Equity Index Tool](#) highlights areas where multiple disadvantage factors overlap, indicating communities likely experiencing greater disparities². The tool maps transportation disadvantaged populations (TDPs) by census block group, showing where residents may face greater transportation challenges. Each block group is assigned a TDP Index based on the densities of specific demographics within a region³.

¹ U.S. Census Bureau. 2018. *2020 Census Participant Statistical Areas Program (PSAP) Quick Reference: Census County Divisions (Form G-660)*. U.S. Department of Commerce. Accessed December 31, 2025. <https://www2.census.gov/geo/pdfs/partnerships/psap/G-660.pdf>.

² The social equity index assigns an equity disparity score to each census tract based on demographic data from the American Community Survey (ACS) at the block group level, with classifications ranging from Low disparity to High disparity.

³ Metrics include age, disability status, income level, limited English proficiency, and race/ethnicity, among others.

Table 1. Transit Dependent Populations

Area	Total Population (2020 Census)	Total Population (ACS)	Total Households (ACS)	Below Poverty Line	People with a Disability	Youth (Under 18)	Seniors (65 and Older)	Racial/ Ethnic Minority	Zero Vehicle Households	Households with LEP	Veteran
Oregon	4,237,256	4,238,714	1,701,548	11.7%	15.0%	20.2%	18.6%	27.7%	7.1%	2.3%	6.0%
Klamath County	69,413	69,812	28,840	18.0%	19.3%	21.7%	22.1%	24.6%	6.3%	1.0%	7.9%
Klamath Falls city ¹	21,813	21,879	9,245	22.6%	20.8%	21.3%	15.5%	29.0%	11.6%	0.7%	7.2%
Klamath Falls CCD ²	51,168	51,415	21,071	19.1%	18.8%	23.0%	20.1%	25.9%	7.3%	1.0%	7.5%
Crescent Lake CCD ³	3,301	3,546	1,500	17.1%	24.9%	13.0%	29.5%	6.3%	2.6%	0.0%	11.3%
Chiloquin CCD ⁴	5,017	4,547	2,201	17.2%	22.9%	14.9%	37.5%	26.3%	4.1%	0.0%	10.4%
Keno CCD ⁵	3,304	2,977	1,270	12.9%	18.1%	17.0%	23.1%	11.9%	6.2%	0.0%	11.3%
Langell Valley CCD ⁶	1,608	1,663	710	15.3%	20.7%	18.2%	35.7%	7.5%	2.3%	2.0%	10.0%
Malin CCD ⁷	1,472	1,624	511	20.5%	17.4%	29.1%	11.9%	36.8%	2.5%	0.0%	2.6%
Merrill CCD ⁸	2,069	2,361	873	9.4%	16.6%	24.9%	15.0%	21.6%	2.9%	4.0%	4.2%
Yonna Valley-Poe Valley CCD ⁹	1,474	1,679	704	11.3%	18.5%	19.1%	28.2%	16.3%	0.9%	0.9%	10.8%

¹ Klamath Falls city is within the Klamath Falls CCD but covers a smaller geographic area.

² Encompasses the Klamath Falls urban area and nearby unincorporated communities, including Falcon Heights, Pine Grove, Olene, Running Y Ranch, and Shady Pine.

³ Covers northern Klamath County, including the unincorporated communities of Crescent, Gilchrist, Chemult, Beaver Marsh, and Crescent Lake Junction.

⁴ Includes the central and eastern portions of the county, encompassing the City of Chiloquin and the unincorporated communities of Sprague River, Fort Klamath, Oregon Shores, and Beatty.

⁵ Includes unincorporated communities of Keno, Lake of the Woods, and Rocky Point.

⁶ Covers eastern Klamath County, including the City of Bonanza and the unincorporated communities of Bly and Lorella.

⁷ Includes the City of Malin.

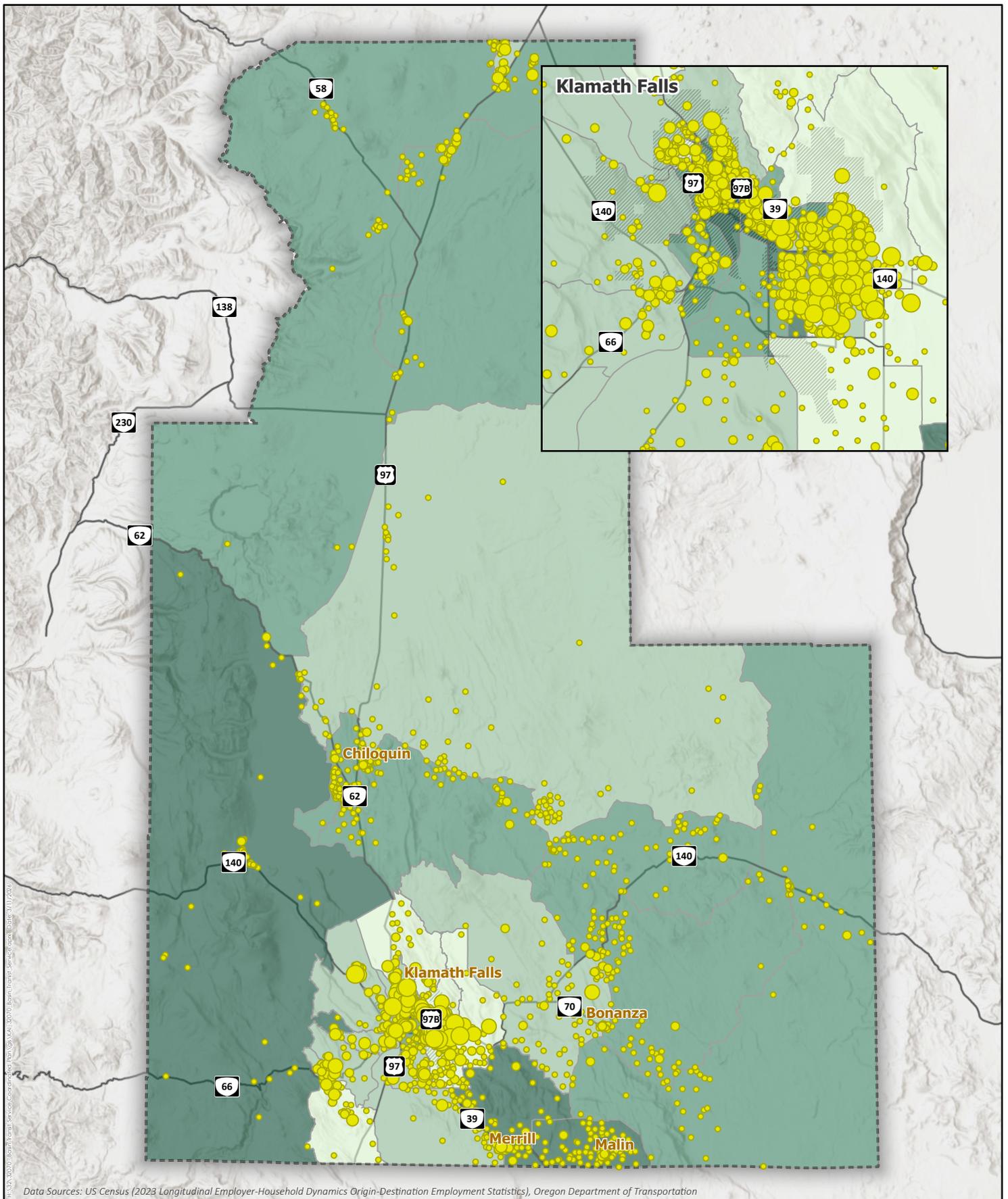
⁸ Includes the City of Merrill.

⁹ Includes the unincorporated community of Dairy.

Figure 2 and Figure 3 illustrate the TDP indices across Klamath County, and are overlaid with information about where people employed in the county both work and live. These maps show:

- Higher levels of transportation-related disparity in rural areas outside of the Klamath Falls urban core, and select areas within it.
- Additional pockets of disparity within portions of the Klamath Falls urban area.
- Population clusters in:
 - Klamath Falls
 - Chiloquin
 - Bonanza
 - Merrill
 - Malin
- Several census block groups near Bonanza and Chiloquin exhibit medium-high levels of disparity and contain clusters of homes for people that are employed within the county
- Employment centers are concentrated in and around Klamath Falls
- Many higher-disparity populations reside in rural or outlying communities such as Chiloquin, Merrill, Malin, and north county.

This spatial mismatch highlights the importance of providing equitable and reliable transportation connections between rural communities, the urban core, and smaller population centers, including Merrill, Malin, Bonanza, Chiloquin, and communities along the US 97 corridor, to ensure equitable access to employment areas and essential services.



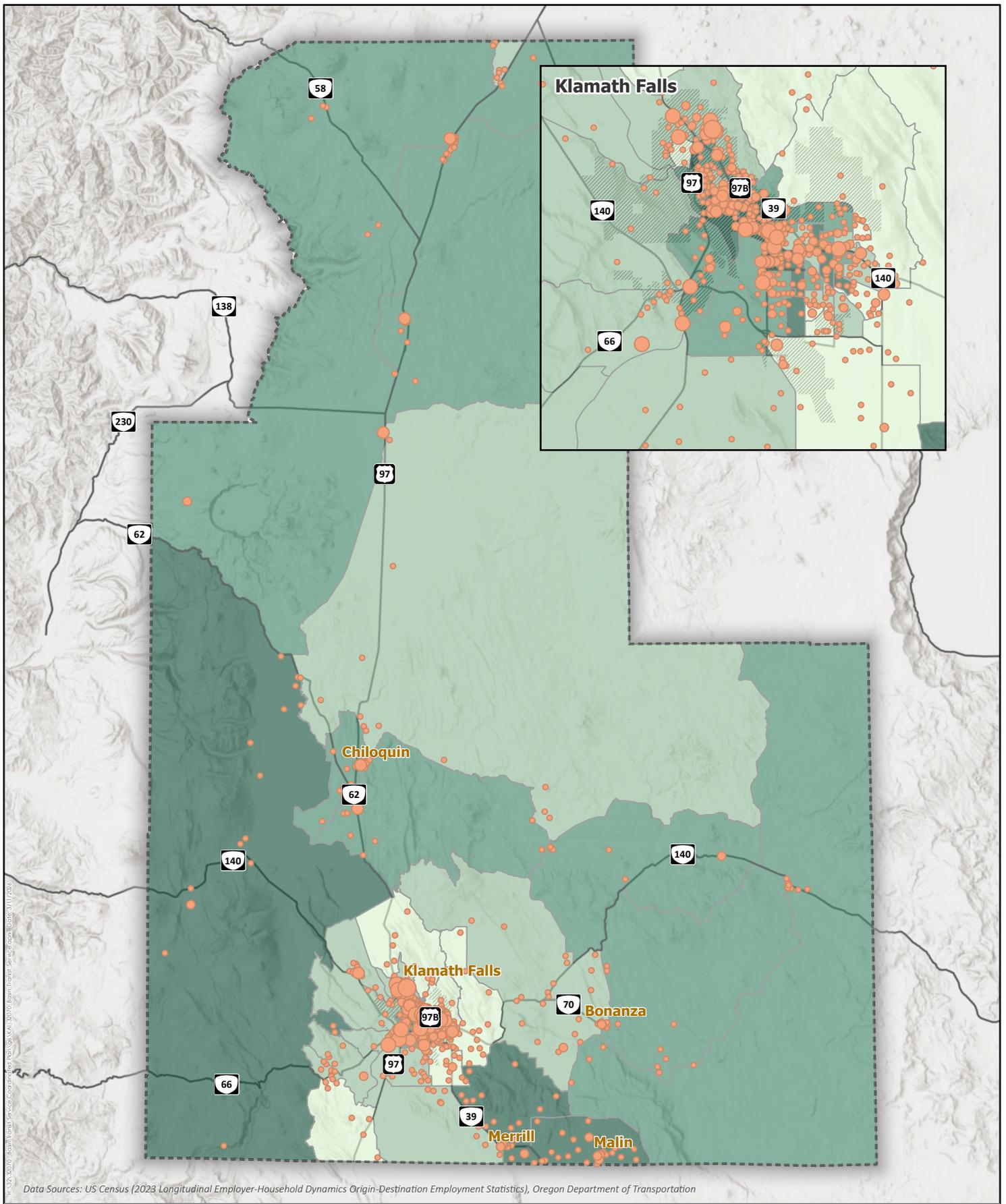
Data Sources: US Census (2023 Longitudinal Employer-Household Dynamics Origin-Destination Employment Statistics), Oregon Department of Transportation

Home Locations	<ul style="list-style-type: none"> ● 1-11 ● 12-30 ● 31-63 ● 64-120 ● 121-231 	Oregon Social Equity Index - Disparity Category <ul style="list-style-type: none"> High Medium/High Low/Medium Low 	<ul style="list-style-type: none"> Incorporated City County Boundary
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Figure 2

Home Locations of People Employed Klamath County, OR



Data Sources: US Census (2023 Longitudinal Employer-Household Dynamics Origin-Destination Employment Statistics), Oregon Department of Transportation

- | | | |
|----------------------|--------|--|
| Job Locations | 1-34 | 112-241 |
| | 35-111 | 242-501 |
| | | 502-1897 |
| | | Oregon Social Equity Index - Disparity Category |
| | | High |
| | | Medium/High |
| | | Low/Medium |
| | | Low |

- | |
|-------------------|
| Incorporated City |
| County Boundary |



Figure 3
**Job Locations of People Employed
 Klamath County, OR**



The Klamath Tribes
Quail Trail Public Transit

Section 2
Public Engagement

Public Engagement

Public engagement is a key element to establishing a shared vision for public transportation in Klamath County. The various engagement methods that guided this Coordinated Human Services Transportation Plan included the following:

- **Provider surveys** that gathered information on available transportation services, types of riders using such services, and the challenges they face when using them;
- Regular meetings with a **Project Advisory Committee** to seek input on analysis findings and guidance on strategies; and,
- **Public outreach** structured to reach people in their community and gather their feedback.

The following sections provide more detail on these public engagement efforts. The input received during these efforts is incorporated into Sections 3 through 5 of this plan.

Additional information is available in Appendix A.

PROVIDER SURVEYS

The provider surveys aimed to identify existing services and transportation needs among transit and human services providers in the region, helping this plan develop strategies that promote greater coordination and collaboration to improve mobility for transit-dependent populations. The survey sought information from providers such as:

1. How best to describe their organization (e.g., public transit agency, public human services agency, etc.).
2. The type of transportation services they provide, if any, and the types of vehicles they offer and whether they're Americans with Disabilities Act (ADA) accessible.
3. Their hours/days of operation and number of clients needing service each month.
4. What populations and trip purposes they serve.
5. The greatest needs of and primary transportation for their clients.

The following entities provided input through the provider survey:

- Klamath Tribal Transport
- Klamath Tribal Health and Family Services
- REACH Klamath Falls
- Oregon Department of Human Resources
- Veterans Health Administration
- Disabled American Veterans
- Klamath County Developmental Disabilities Services
- Klamath Basin Behavioral Health

PROJECT ADVISORY COMMITTEE MEETINGS

BTSTD and Quail Trail Public Transit formed a Project Advisory Committee (PAC) to help guide development of this plan. The PAC met during four milestones, including to discuss the purpose of the plan and the reason for updating it, as well as existing transportation services, identified transportation service needs, and recommended strategies. The PAC included representatives from the following entities:

- BTSTD
- Quail Trail Public Transit
- The Klamath Tribes
- Klamath Basin Senior Citizen's Center
- the Oregon Department of Human Services (DHS)
- REACH Inc.
- Klamath County Developmental Disabilities Services
- Disabled American Veterans
- US Department of Veterans Affairs
- Sky Lakes Medical Center
- Klamath County Public Works
- Klamath Community College (KCC)
- Transformations
- Klamath County Public Health
- Klamath Tribal Health and Family Services
- Klamath Basin Behavioral Health
- Klamath Lake Community Action
- ODOT

PUBLIC OUTREACH

Public outreach gathered input from local transit providers, human services agencies, community partners, and the public through surveys, focus groups, and online engagement. Key advertising methods used to promote public outreach included a project webpage hosted on BTSTD's website, social media posts, and one-page flyers in English and Spanish distributed by BTSTD, Quail Trail Public Transit, and the PAC. Outreach was conducted in two phases, described in the following sections.

Phase 1 Outreach: Needs and Opportunities

This outreach phase focused on gathering community and provider perspectives on challenges, service gaps, and improvement ideas primarily through a rider survey and focus groups. Note that information on transportation needs gathered through the provider survey described previously also informed this phase of outreach.

Rider Survey

BTSTD and Quail Trail Public Transit conducted a three-and-half-week rider survey distributed on their transit routes and through community partners. The survey was available online and in print, in English and Spanish, and staff assisted riders as needed.

A total of 176 riders participated in the survey, helping confirm known service gaps and highlight opportunities for improvement:

- **Limited service hours and frequency:** Riders report that buses end too early, run infrequently, and lack evening and weekend service—indicating demand for extended hours and more frequent trips.
- **Gaps in geographic coverage:** Current routes do not reach all desired destinations, leaving some communities underserved and limiting access to work, healthcare, and shopping.
- **Low rider awareness:** Some respondents do not feel well-informed about available services or how to use them, affirming the need for increased outreach, clearer information, and user-friendly tools.
- **Accessibility challenges:** Riders with disabilities and mobility limitations report barriers to vehicle accessibility, bus stop conditions, and the ability to safely reach stops.
- **Payment preferences:** A majority of riders prefer monthly or annual passes, reflecting demand for simple, cost-effective fare options. Many also favor mobile or contactless payments, highlighting the value of digital solutions. A small portion would use transit only if it were free, underscoring ongoing affordability concerns.

Focus Groups

Three virtual focus group meetings gathered specific feedback on transportation service needs of **health and human services providers, higher education representatives, and The Klamath Tribes**. These focus groups used the results of the rider survey as a foundation for discussion. The discussions aimed to validate survey findings, understand other transportation barriers not fully captured in the survey, and help inform future transit planning and coordination efforts for transportation and human services providers.

Across all focus groups, participants generally agreed that the survey accurately reflected current conditions and highlighted two key needs:

- **Expanded transit hours** (e.g., early mornings, evenings, and weekends) to better support medical appointments, employment, education, and essential services. Limited service windows and capacity constraints are major barriers for individuals with disabilities, mental health or substance-use challenges, students without vehicles, and tribal members needing access to healthcare.
- **Improved coordination** among transit providers, human service agencies, educational institutions, and tribal organizations. Better information sharing, rider training, and first/last-mile solutions were seen as critical to improving access and usability.

While funding constraints remain a key challenge for transportation service, the meetings underscored the value of data-driven planning and ongoing collaboration to right-size services, pursue alternative funding strategies, and prioritize investments over the next five years.

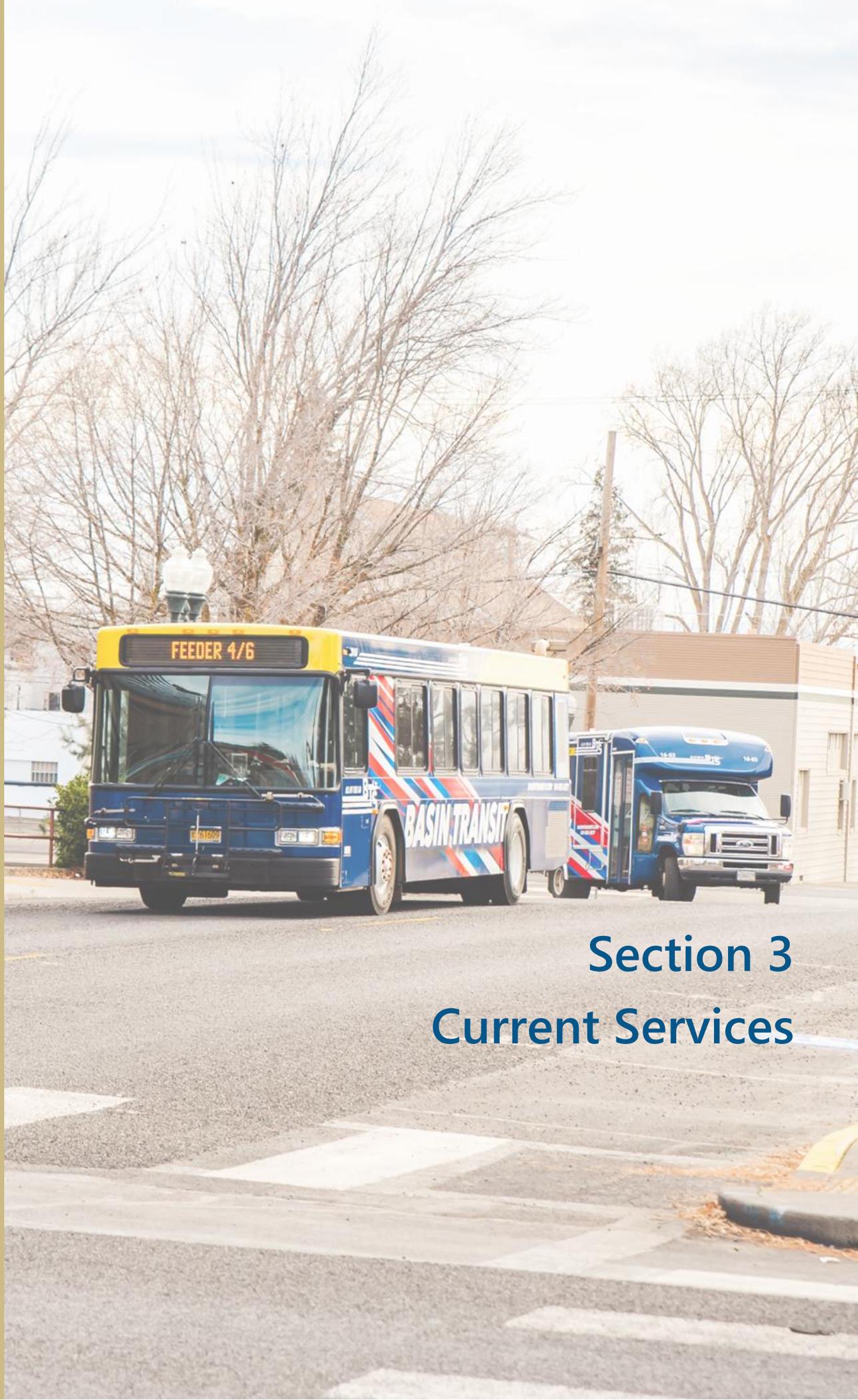
Phase 2 Outreach: Recommended Strategies

This phase focused on presenting the Draft Plan through a live virtual presentation to the community, allowing participants to learn about the recommended transit strategies and provide their feedback in real-time. The primary presentation format was conducted with a virtual meeting that community members could broadly access with a computer. To increase accessibility for community members without a computer, BTSTD hosted the live virtual presentation at its main office and offered transportation service for participants; Quail Trail Public Transit also provided transportation service to the event. Seven community members attended the presentation in person at BTSTD; no community members attended online.



An online comment form was made available after the presentation to submit feedback on the Draft Plan for one week following the event. A paper copy of the comment form was also available. Five community members provided feedback on the Draft Plan and felt it provided them with the following:

- A better understanding of and more incentive to use the current transit services available in Klamath County (Section 3 of this plan).
- Representation of their personal transit needs (Section 4 of this plan).
- Service strategies that meet their transit needs; marketing and education strategies that will help more people learn about the transit services available in Klamath County and how to use them; and information and technology strategies that will make transit services in Klamath County more reliable and easier to use (Section 5 of this plan).



Section 3 Current Services

Current Services

Klamath County is served by a variety of transportation providers that meet the diverse mobility needs of residents and connect the county to the broader region. These providers include **public transportation agencies** that operate fixed-route and demand-response services, as well as **human services organizations** that offer specialized transportation or have specific transportation needs for populations such as seniors, individuals with disabilities, veterans, and low-income residents. Public transportation and human service providers often overlap in their areas of service, leading to opportunities to improve efficiency and streamline connectivity.

This section provides an overview of the current providers operating in Klamath County. As the needs of the community, funding sources, client demographics, and shifting priorities change, providers should evolve to address the growing needs of the populations they serve.

Additional information is available in Appendix B.

PUBLIC TRANSPORTATION PROVIDERS

Public transportation providers operate locally and regionally within Klamath County, connecting riders to employment, healthcare, education, and other essential destinations in Oregon. These transportation providers and their routes are identified in Figure 4.

Basin Transit Service Transportation District

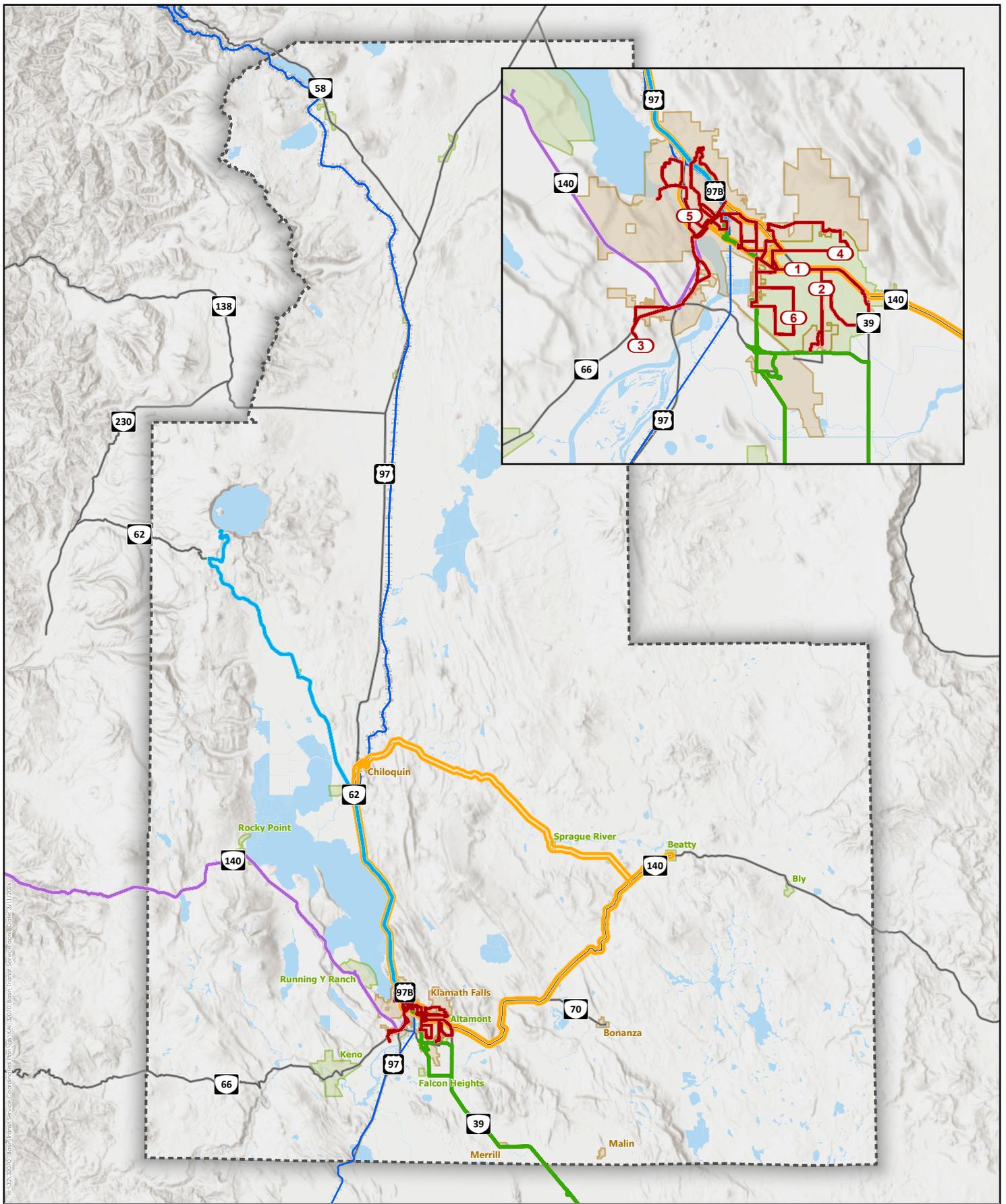
Located in Klamath Falls, BTSTD aims “to provide safe, efficient, and accessible transportation” to create better community livability and increased access for riders in cities and communities in Klamath County. BTS offers a number of services to several types of clientele, described in the following sections.

Service

BTS offers both demand response and fixed-route services, which are described separately in later sections. In its entirety, BTS served more than 175,000 riders in 2024, despite a reduction in service due to funding and public guidance.

Fixed-Route Service

The Fixed-Route Service offered by BTS serves the Klamath Falls Urban Area with three mainlines and two feeder routes, as shown in Figure 5.



- Basin Transit Service Fix Routes
- Klamath Shuttle
- Sage Stage Routes
- Qual Trail Public Transit
- South West POINT Routes
- Coast Starlight Amtrak Line
- Incorporated Cities
- Census Designated Places
- County Boundary



Figure 4
Transportation Services in Klamath County
Klamath County, OR

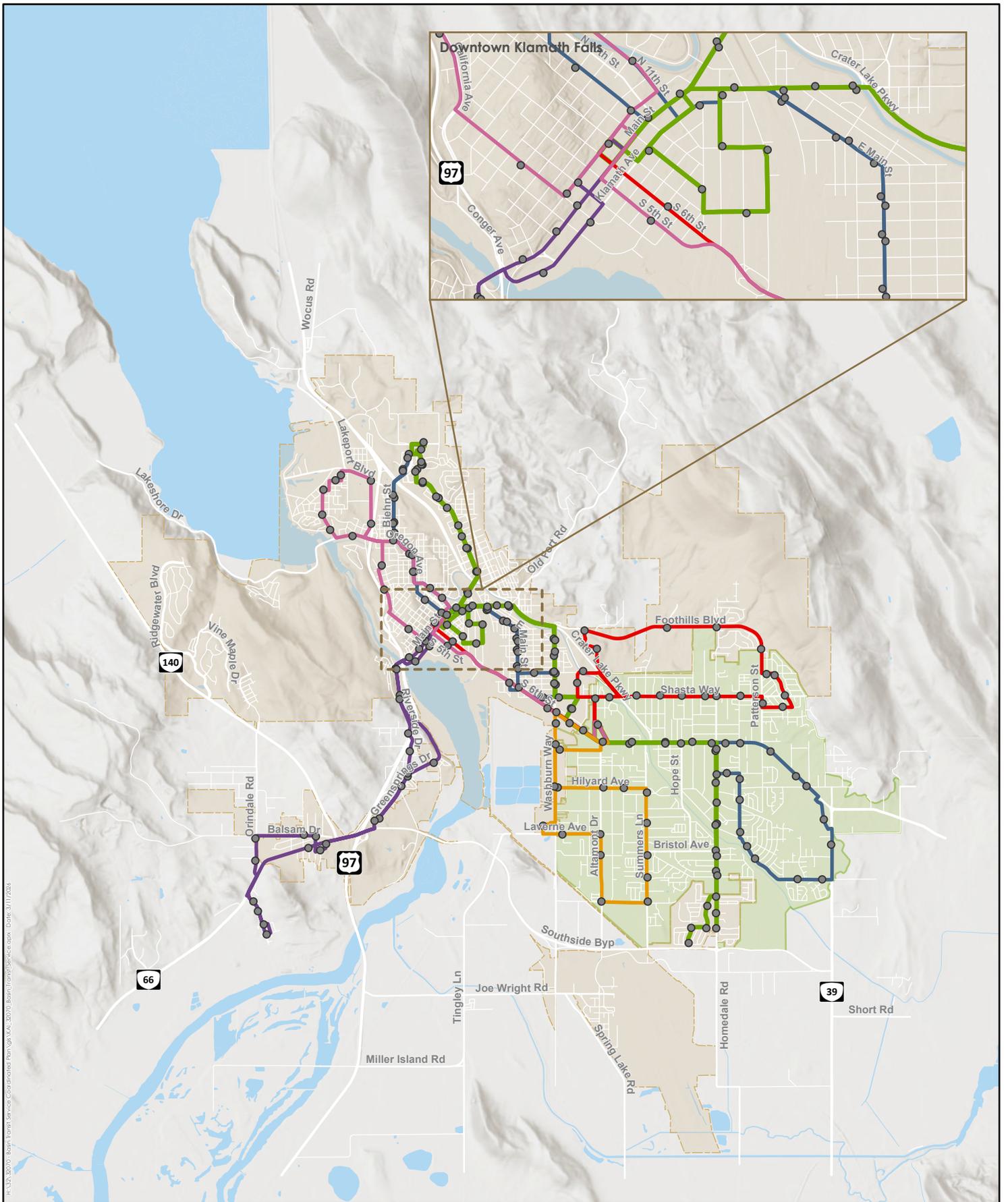


Figure 5

These fixed routes provide transportation to areas of interest, including Oregon Institute of Technology (OIT), Klamath Community College (KCC), Sky Lakes Medical Center, grocery stores, the Klamath County Veterans Service Office, the YMCA, the Senior Center, and other notable locations. This service is available from 8:00AM to 5:00PM Monday-Friday, except for major holidays and depending on winter travel conditions, and each route operates on approximately 60-minute headways. *Detailed service schedules are available on BTSTD’s website.*

Table 2 lists the fares for this service. Reduced fares are available to seniors and riders with disabilities who qualify through the reduced-fare program. Veterans, youth 18 and under, and OIT and KCC students with valid student identification cards ride free. Passes and tokens can be purchased from bus drivers or by mail using a form available on the BTSTD website.

Table 2. BTS Fixed Route Service Fares

Fare	Cash	Day Pass	Token (10)	Monthly Pass
Regular	\$0.75	\$1.50	\$7.50	\$27
Reduced	\$0.50	\$1.25	\$5.00	\$18
Youth/ Students	Riders under 18 and college students with valid student IDs ride free.			

Annual ridership has steadily declined since the COVID-19 pandemic, falling from 250,226 rides in 2019 to between 166,000 and 184,000 through 2023 (Exhibit 1). After BTSTD reduced services in April 2024 to right-size operations and respond to funding shortages — shortening weekday service hours and eliminating Saturday service—ridership dropped further. Compared to 2024, 2025 ridership is 8% lower, reflecting ongoing declines as many riders continue using alternative transportation options adopted during the pandemic.

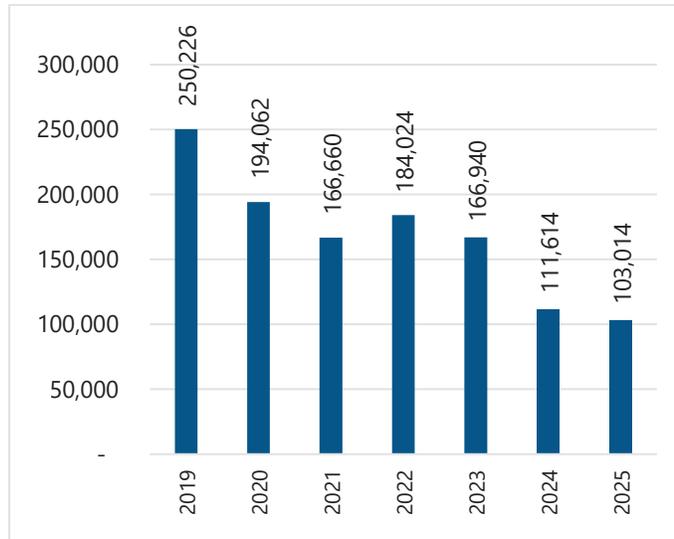


Exhibit 1. Fixed-Route Annual Ridership (2019-2025)

Monthly ridership declined 32-48% in January-March 2024 versus between 2023 (Exhibit 2). After the April 2024 service reduction, April-December 2024 ridership was 38-70% below the same period in 2023. Average monthly ridership declined from 13,912 in 2023 to 9,301 in 2024, likely reflecting riders adjusting to the service reduction and using other transit services. Seasonal ridership patterns remained similar, with peaks in January-March and lows in November-December.

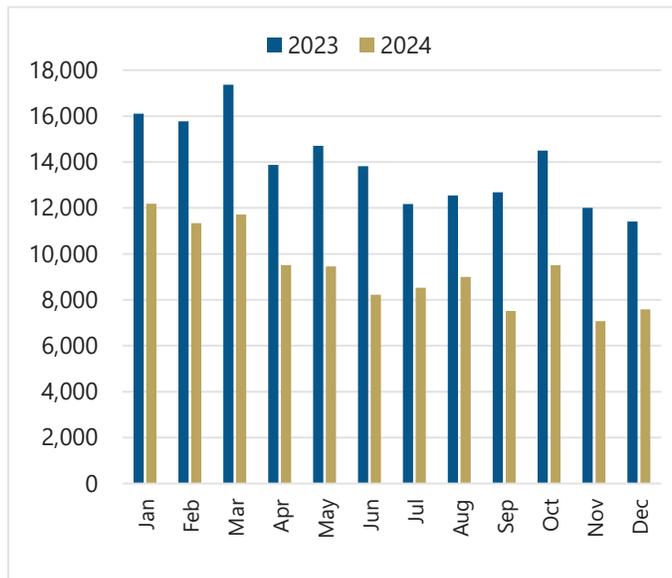


Exhibit 2. Fixed-Route Monthly Ridership

Basin Lift

Basin Lift provides door-to-door, wheelchair-accessible transportation service for riders 65+ and those who have an ADA-qualifying disability who cannot use fixed-route service. Riders with disabilities must apply for eligibility; those 65 and older qualify automatically. Applications can be completed online or by calling the Basin Lift Dispatch Center.

Service operates from 8:00AM to 5:00PM Monday-Friday (except for major holidays) within a ¾-mile radius of BTSTD fixed routes. Riders must schedule their trips by calling the Basin Lift Dispatch Center before 5:00 PM on the business day prior to the requested ride. Fare are \$1.50 per one-way trip, or \$30 for a 20-ride punch card. Punch cards can be purchased from bus drivers with cash or check, or through the Basin Lift Dispatch Center (in person or by phone) with debit or credit. Eligible riders may use fixed routes at reduced fares. Additional rider guidelines are provided in the Basin Lift Handbook (e.g., personal care attendants/guest riders, pets, take-along items, arrival and departure planning, cancellations).

Annual ridership has fluctuated since 2019 (Exhibit 3). It fell 57% 2020 largely due to the pandemic, hitting a low of 8,175 in 2021 (65% below 2019), and rebounded by 83% in 2022, nearly returning to pre-pandemic levels by 2023. In 2024, ridership declined; in 2025, it was 30% below 2024 ridership, indicating a continued downward trend.



Exhibit 3. Basin Lift Annual Ridership (2019-2025)

Average monthly ridership from 1,732 riders per month in 2023 to 1,445 riders in 2024 (Exhibit 4). Ridership in 2024 initially outpaced 2023 levels, but after the April service reduction, monthly ridership dropped below 2023 levels, with a clear decline from March and April. Data shown is from January 1 through October 31, 2025.

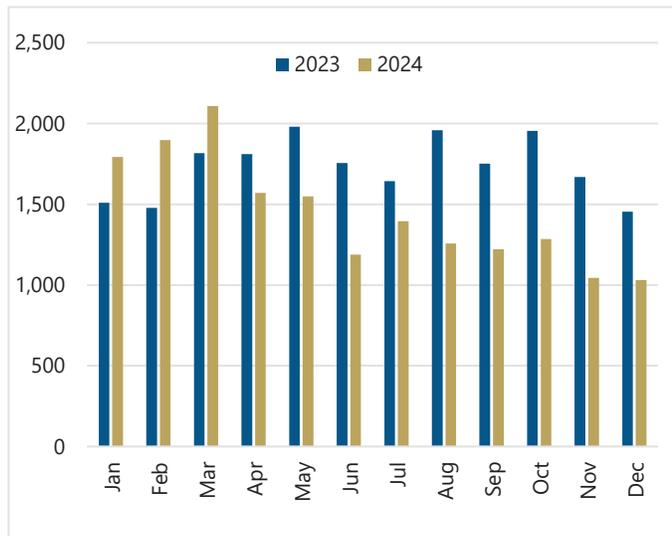


Exhibit 4. Basin Lift Monthly Ridership

Basin Connect

Funded by STIF, Basin Connect is a reservation-based service that provides free demand-response trips between Klamath Falls and outlying communities in Klamath County. Riders must reserve their trip the prior business day. Upon arrival in Klamath Falls, riders receive a fixed-route Day Pass. Riders 65+ may also apply for Basin Lift service available within BTSTD district boundaries. All vehicles are ADA-accessible, allow qualified service animals, secure wheelchairs with a four-point tie down system. The service schedule and destinations include the following:

- **Mondays / Wednesdays:** Keno, Worden, Falcon Heights, Lake of the Woods
- **Tuesdays / Thursdays:** Bly, Beatty, Bonanza, and Merrill

Detailed service schedules are available on BTSTD’s website.

Basin Connect recorded 763 riders in 2024, though it did not operate in January and February. From January–October 2025, ridership fell to 277 riders, down from 678 during the same period in 2024—a 59% reduction.

Demand Service

The Klamath Falls Senior Center manages a demand-response service for seniors, people with disabilities, and others as space allows. In 2024 it provided 10,053 rides. Trips are scheduled by priority: Medical appointments, congregate meal sites, employment, grocery shopping, then non-essential travel. The service operates from 8:30AM-3:30PM Monday-Thursday and 8:30AM-12:00PM on Fridays.

Annual ridership averaged about 10,523, dipped during the pandemic, and reached a high of 13,875 in FH 2024-25 (Exhibit 5). Early FY 2025-26 data showed ridership trending with 637 rides July-September compared to 604 the previous year. Data shown is from July 1, 2025, through September 30, 2025.

In FY 2024-2025, demand service rides were 23% for medical services, 9% for shopping, 14% for other purposes, and 53% for trips to the Senior Center, which represented the largest share of total trips.

Veterans on The Go

Since November 2020, BTSTD partnered with Klamath County Veteran Services to provide free rides for Veterans with a Klamath County Veterans Card. This initiative increased monthly ridership from 49 to 1,300 and includes a weekly Wednesday trip to Medford access to the White City Veterans Affairs Hospital, Social Security Office, and medical specialty offices. Veterans are be picked up either at their doorstep (if Basin Lift-eligible) or at the nearest bus stop, and all vehicles are ADA compliant. From April-September 2024, BTSTD provided an average of 10 Medford trips per month (Exhibit 6). Most using this program ride BTSTD’s fixed-route services.

Facilities

BTS runs operations and maintenance out of its main facility in Klamath Falls, at 1130 Adams Street. BTS also acquired 1125 Adams Street for additional administration offices and storage room.

Vehicle Fleet

BTS operates a 32-vehicle fleet that includes buses, and support vehicles such as vans, SUVs, pick-up trucks, and sedans with varying capacities, ages, mileage, and ADA accessibility. Fleet details are provided in Table 3.

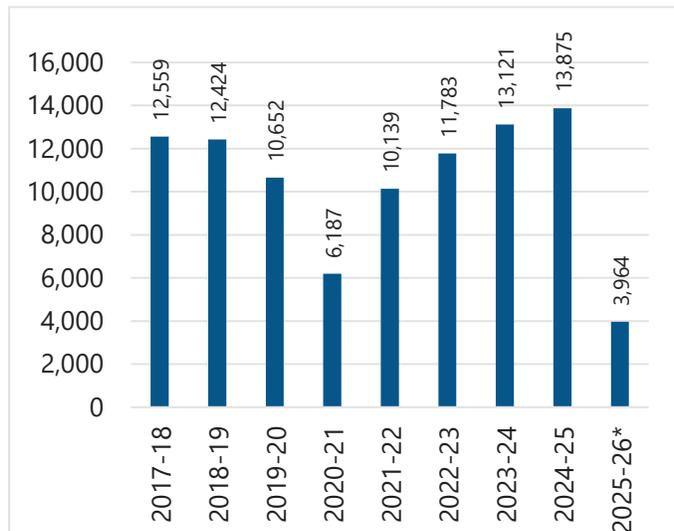


Exhibit 5. Demand Service Total Annual Ridership (by Fiscal Year)

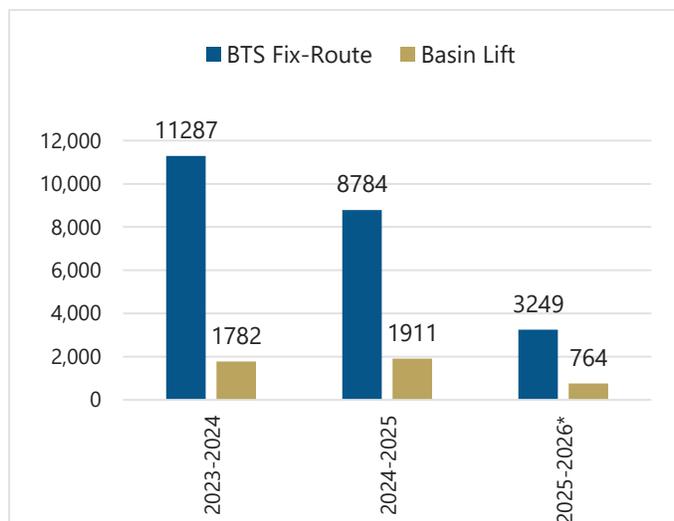


Exhibit 6. Annual Veteran Rides (by Fiscal Year)

Table 3. BTS Vehicle Fleet

Asset #	Department	Year	Make	Model	Condition	Odometer
1001	Support	2010	Ford	F350	Needs Replacement	63,726
2016	Fix Route	2014	Gillig	Low Floor	Good	450,757
2017	Fix Route	2014	Gillig	Low Floor	Good	469,611
16-04	Fix Route	2016	Blue Bird	T3 RE 3510	Good	246,214
16-05	Fix Route	2016	Blue Bird	T3 RE 3510	Good	230,206
2018	Fix Route	2016	Gillig	Low Floor	Good	398,999
2019	Fix Route	2016	Gillig	Low Floor	Good	415,282
1601	Paratransit	2016	Ford	Starlite 20	Replacement in Progress	136,705
1602	Paratransit	2016	Ford	Starlite 20	Replacement in Progress	131,157
1603	Paratransit	2016	Ford	Starcraft Allst	Spare Vehicle	195,549
17-01	Support	2017	Ford	F150	Good	37,371
17-02	Support	2017	Ford	Escape	Good	66,249
19-02	Support	2018	Ford	Fiesta	Good	9,963
19-03	Paratransit	2019	Ford	Transit	Good	44,216
19-01	Support	2019	Ford	Escape	Good	36,756
22-04	Fix Route	2021	Ford	F550	Good	90,369
22-05	Fix Route	2021	Ford	F550	Good	74,934
22-06	Fix Route	2021	Ford	F550	Good	73,036
22-07	Fix Route	2021	Ford	F550	Good	54,682
21-01	Support	2021	Ford	ESCAPE	Good	12,765
22-01	Paratransit	2022	Ford	E450	Good	76,672
22-02	Paratransit	2022	Ford	E450	Good	69,898
22-03	Support	2022	Ford	F450	Good	3,291
22-08	Support	2022	Ford	Transit Connect	Good	10,069
24-01	Paratransit	2024	Ford	E450	Good	20,421

Asset #	Department	Year	Make	Model	Condition	Odometer
25-01	Paratransit	2025	Ford	Transit Connect	Good	25
25-02	Paratransit	2025	Ford	Transit Connect	Good	N/A

Excluding the 1996 trolley, the oldest vehicles are two nearly 25-year-old Gillig buses used for fixed-route service—also among the fleets highest-mileage vehicles, with one exceeding 400,000 miles. Over the past five years, BTSTD has added 12 vehicles, including five paratransit vans, but nine of the 32 current vehicles now need replacement due to age, high mileage, or maintenance concerns.

Technology

BTSTD customers rely on the BTS website that offers information on transit services, schedules, and fares. Most services that require a reservation, such as the Basin Lift Demand Service and Basin Connect, require customers calling BTSTD 24 hours in advance to schedule a ride.

Current Funding

BTSTD is funded through a combination of local taxes, state transit programs (including STIF), and federal FTA funds, summarized in Table 4 and Table 5. Local tax revenue has remained steady at about \$1.37 million annually, while state funding has grown from roughly \$152,000 in FY 2017 to over \$1.1 million by FY 2025, largely due to expanded state transit funding programs.⁴ Federal revenue has stabilized at about \$1.31 million in recent years. From FY 2021-2025, total annual revenues averaged \$5.48 million, with fares and other local sources contributing minimally. These funds support BTSTD’s operating, personnel, and capital needs, with personnel costs consistently comprising the largest share.

⁴ In 2023, Oregon consolidated STIF and the Special Transportation Fund (STF) into a single program, increasing both the amount of funding available to transit agencies and their access to those funds.

Table 4. BTS Transportation District Summary of Revenues - Fiscal Years 2017 - 2025

Revenues	Ending Fiscal Year								
	2017	2018	2019	2020	2021	2022	2023	2024	2025
Beginning Balance	\$1,057,569	\$1,034,407	\$1,219,672	\$2,099,915	\$1,833,474	\$2,189,169	\$1,198,435	\$1,025,609	\$1,385,577
Federal Revenues	\$546,266	\$527,144	\$594,652	\$661,952	\$1,639,082	\$559,889	\$1,397,973	\$1,309,581	\$1,313,000
Local Tax Revenues	\$1,111,661	\$1,203,249	\$1,332,940	\$1,264,550	\$1,343,199	\$1,411,055	\$1,464,916	\$1,580,449	\$1,619,918
State Revenues	\$152,260	\$167,082	\$172,053	\$235,379	\$491,940	\$991,270	\$1,281,441	\$1,336,554	\$1,125,994
Fares Revenues	\$276,709	\$281,499	\$307,541	\$209,580	\$75,438	\$95,502	\$132,060	\$93,654	\$100,601
Other Local Revenues	\$142,239	\$31,280	\$101,907	\$53,682	\$105,816	\$25,212	\$5,358	\$5,934	\$18,740
Total Revenues	\$3,286,704	\$3,244,661	\$3,728,765	\$4,525,058	\$5,488,949	\$5,272,097	\$5,480,183	\$5,351,781	\$5,563,830

Table 5. BTS Transportation District Summary of Expenses - Fiscal Years 2017 - 2025

Expenses	Ending Fiscal Year								
	2017	2018	2019	2020	2021	2022	2023	2024	2025
Personnel Expense	\$1,531,811	\$1,715,344	\$1,692,675	\$1,799,299	\$2,285,484	\$2,347,645	\$2,684,985	\$2,778,533	\$2,528,337
Operational Expense	\$431,401	\$486,868	\$590,858	\$831,944	\$915,567	\$1,009,069	\$1,134,671	\$1,109,108	\$1,349,926
Capital Expense	\$46,449	\$32,849	\$73,491	\$77,643	\$128,557	\$508,079	\$621,199	\$68,624	\$231,362
Transfer to Capital Reserve	\$-	\$-	\$65,628	\$-	\$-	\$-	\$-	\$-	\$75,000
Operating Contingency Expense	\$-	\$-	\$-	\$-	\$-	\$-	\$-	\$-	\$-
Reserve for Future Expense	\$-	\$-	\$6,113	\$516,172	\$859,341	\$107,304	\$-	\$95,516	\$79,205
Unappropriated Fund Balance	\$1,277,043	\$1,009,600	\$1,300,000	\$1,300,000	\$1,300,000	\$1,300,000	\$1,039,328	\$1,300,000	\$1,300,000
Total Expenses	\$3,286,704	\$3,244,661	\$3,728,765	\$4,525,058	\$5,488,949	\$5,272,097	\$5,480,183	\$5,351,781	\$5,563,830

Quail Trail Public Transit

The Quail Trail Public Transit is operated by The Klamath Tribes: Klamath, Modoc, and Yahooskin, and aims to provide reliable, fare-free, safe and accessible transportation to enhance livability for the Klamath Tribes community. Based in Chiloquin, where the Tribal Administration is located, the Quail Trail Public Transit connects Chiloquin, Beatty, Sprague River, and Klamath Falls, as shown in Figure 6 and described in the following sections.

Service

Quail Trail Public Transit, funded in part by ODOT and the FTA, provides service to all people along its bus routes and serves approximately 800–900 clients per month. It supports a wide range of riders—including seniors, people with disabilities, low-income residents, veterans, youth, students, tribal members, and individuals with medical or recovery needs—and averages over 11,000 annual trips, with about 20% of riders being seniors and/or people with disabilities (Exhibit 7). Key trip needs include medical and dental care, community events, elder/senior services, employment, and grocery shopping. Key challenges include limited evening and weekend service, stop locations relative to destinations, and adverse weather.

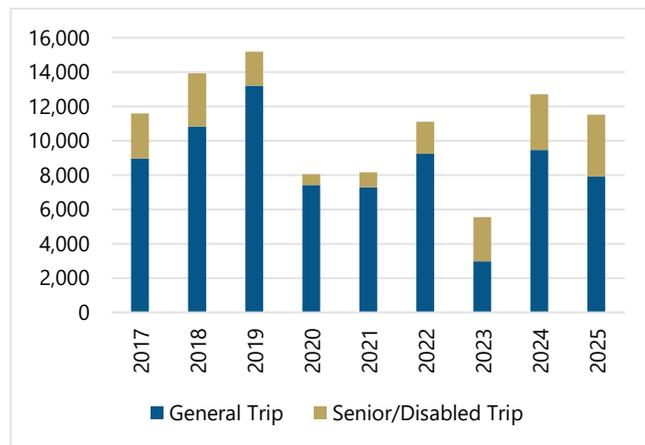


Exhibit 7. Quail Trail Annual Ridership (2017-2025)

Fixed-Route Service

Monday-Friday, the fixed-route service runs from 5:55 AM to 6:40 PM, making five daily trips between Chiloquin and Klamath Falls. On Thursdays, it also serves Sprague River and Beatty. These routes connect riders to key destinations, including the Kla-Mo-Ya Casino and Hotel, Sherm’s Thunderbird Grocery, the Klamath Falls Senior Center, the Klamath Tribes Administration Building, and other community hubs. *Detailed service schedules are available on The Klamath Tribes’ website.*



- Quail Trail Public Transit
- Incorporated Cities
- Census Designated Places
- County Boundary



Figure 6



Quail Trail Public Transit Service
Klamath County, OR

Demand-Response

Quail Trail Public Transit provides demand-response service throughout Klamath County, primarily connecting riders from outlying areas to Klamath Falls. Medical trips offer door-to-door service as far as Medford, Bend, Madras, and Eugene, scheduled around appointment times. The system also serves a growing number of Veterans—68 trips in 2024—with demand tripling since July 2025 and exceeding driver capacity in Fall 2025. Additional services include grocery trips for Tribal Elders and other residents without fixed-route access, Tribal Elder meal site trips to Beatty and Chiloquin (10–15 rides per week), and scheduled trips to the Medford Social Security office, food banks, and other essential errands.

Facilities

Quail Trail Public Transit operates out of The Klamath Tribes Planning Department on 116 E. Chocktoot in Chiloquin. A garage is used for tire/supply storage and houses the vehicle that will be completing the route the next day. All vehicles are taken to Lee's automotive for mechanical services.

Vehicle Fleet

Quail Trail Public Transit operates a 14-vehicle fleet with a range of makes, models, years, mileage, and accessibility, shown in Table 6 on the following page. The fleet includes AWD and 4x4 vehicles, with 10 ADA-accessible vehicles. All vehicles run on gasoline and without Commercial Drivers Licenses.

Technology

Quail Trail Public Transit customers primarily rely on the provider website that offers information on transit services, schedules, and fares. They also use the Blaise Scheduling App and notebooks for drivers to track their rides, times, riders, and mileage. Each driver is also provided a cell phone for safety.

Current Funding

The Quail Trail is funded through the FTA, STIF, and 5310 and 5311 funding through ODOT.

Table 6. Quail Trail Public Transit Fleet

Year	Vehicle	Years Old	Passenger Seats <i>Total Seats (# Seats with Wheelchairs)</i>	Lifts/ Ramps	Used For
05	05 Honda CRV	20	3	None	Demand Response
06	06 Ford E450 Bus	19	14 (12 w/2wc)	Lift	Back-up for Quail Trail Route
10	10 Dodge Caravan Purple	15	5 (3 w/1wc)	Ramp	Demand Response
11	11 Subaru Outback	14	3	None	Demand Response
11	11 Elders Bus	14	14 (12 w/2wc)	Lift	Elders Events
13	13 Dodge Rear "Silver"	12	5 (3 w/1wc)	Ramp	Demand Response
13	13 Dodge Side "Sand"	12	5 (3 w/1wc)	Ramp	Demand Response
19	19 Dodge Caravan "White"	6	5 (3 w/1wc)	Ramp	Demand Response
19	19 Ford Transit Van #27	6	6 (5 w/1wc)	Lift	Demand Response
19	19 Ford Transit Van #28	6	6 & 5w/1wc	Lift	Demand Response
23	23 Ford Explorer	2	5	None	Demand Response
24	24 Ford E450 Bus #2	1	14 (12 w/2wc)	Lift	Quail Trail
24	24 Ford E450 Bus #3	1	14 (12 w/2wc)	Lift	Quail Trail
24	Toyota 4Runner	1	5	None	Demand Response

SouthWest POINT

The POINT is Oregon’s ODOT-funded intercity bus service operated by Pacific Crest Bus Lines, offering year-round, daily service and connecting major hubs and rural communities statewide. The SouthWest Route runs one daily round trip between Klamath Falls and Brookings with 10 stops, as shown in Figure 7, coordinating schedules and shared stops to support easy transfers. *Detailed service schedules are available on The POINT’s website.*

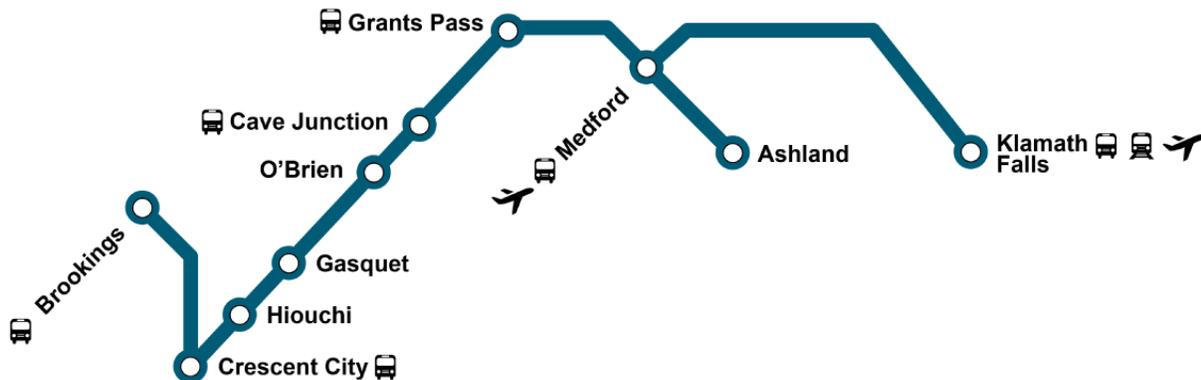


Figure 7. SouthWest POINT Bus Route

Tickets must be purchased in advance through Amtrak, Greyhound, Pacific Crest, and other partners, with fares ranging from \$3-\$52. Free transfers to Josephine Community Transit (JCT), Rogue Valley Transportation District (RVTD), and Redwood Coast Transit Authority (RCTA) service are available. Buses seat 21-35 passengers, are ADA-accessible, and offer Wi-Fi, power outlets, luggage/bike space, and access to restrooms at select stops. An online map provides stop details, photos, schedules, and connection information.

Klamath Shuttle

The Klamath Shuttle is an ADA accessible shuttle service from Klamath Falls to Crater Lake during the summer months. The shuttle leaves from the Craker Lake Trolley office at 445 S Spring Street in Klamath Falls, near the Amtrak station.

Sage Stage

Modoc County in California operates Sage Stage, an intercity bus service that connects the City of Alturas to Klamath Falls with stops in between. The route operates on Thursdays only and deviated service pickups are available within 1 mile of the route. The bus stops at the Klamath Falls Amtrak station.

Pacific Crest Bus Lines

Pacific Crest Bus Lines operates a daily route from Klamath Falls to Redmond. The route begins in Klamath Falls at the Amtrak station and has local stops throughout the route, including

Altamont, the Chiloquin Kla-Mo-Ya Casino, Chemult, Crescent, Gilchrist, La Pine, Sunriver, Bend Hawthorne Station, and the last stop at the Redmond Airport.

Amtrak

Amtrak's Coast Starlight Train is a long-distance passenger train with daily service between Los Angeles and Seattle, passing through several major cities between southern California and its northern terminus with stops in Klamath Falls and Chemult. The Klamath Falls Amtrak station is located on the east side of Downtown Klamath Falls on Oak Avenue near S Spring Street. There are two train arrivals/departures through Klamath Falls daily, one heading northbound (morning) and southbound (evening).

Connections Between Public Providers

As illustrated in Figure 4, riders are able to connect between various public transportation services at the following stops within the Klamath Falls urban area:

- **Basin Downtown Transit Center:** BTSTD and Quail Trail Public Transit
- **Sherm's Thunderbird:** BTSTD and Quail Trail Public Transit
- **Sky Lakes Medical Center:** BTSTD and Quail Trail Public Transit.
- **Amtrak Station:** BTSTD, Klamath Shuttle, SouthWest POINT, and Sage Stage

Providing clear public information that shows when and where services overlap at each shared bus stop could help riders better understand available transfers and connections between local and regional providers.

HUMAN SERVICES PROVIDERS

Human services providers supplement public transportation services by offering specialized transportation or supporting clients who rely on it. These include non-emergency medical transportation (NEMT), senior centers, disability service organizations, and veterans' services, and health and human service agencies, whether they operate vehicles or simply assist clients who depend on transit.

Basin Medical Transportation

Basin Medical Transportation provides 24/7 non-emergency medical transport for appointments, discharges, dialysis, and other medical needs. Founded in 2019, it offers three services: sedan and wheelchair transport (each \$2.75 pickup + \$2.75/mile) and stretcher transport (\$200 pickup + \$4/mile), with door-to-door assistance and trained staff as needed. Services can require 24–48 hours' notice (short-term) or 3–5 business days (long-term), though same-day trips may be available. Payment can be made privately or through insurance; private-pay riders book directly with Basin Medical, while insurance-covered riders must schedule through TransLink.

Klamath Tribal Health & Family Services

Klamath Tribal Health and Family Services provides weekday (8 AM–5 PM) non-emergency medical and cultural-event transportation for eligible Tribal members, serving 300–450 clients per month. Trips are scheduled through a dispatcher and typically stay within Klamath County, with limited out-of-county medical trips available. The program also coordinates after-hours and holiday rides through contracted providers and offers limited bus tokens and support via Chiloquin Transit. Transportation is provided with eight GSA-leased vans, including two with wheelchair lifts. Service is prioritized for elders, patients needing dialysis or cancer treatment, people with disabilities, and children, and supports both medical and cultural/community trips.

The Klamath Tribes Transit

Klamath Tribes Transit operates weekday demand-response service (8 AM–5 PM) for 50–60 clients per month, serving people with disabilities, older adults, low-income residents, youth, tribal members, and individuals in recovery. Trips—scheduled in advance—cover medical, work, school, shopping, senior, and social needs using agency-owned vans that are not ADA-accessible. Funding comes from federal, state, and private/grant sources.

REACH Klamath Falls

REACH Klamath Falls is a nonprofit providing work, training, and rehabilitation opportunities for people with disabilities and others facing employment barriers, serving over 100 clients monthly. It operates Monday–Thursday (8:00 AM–4:30 PM) and Friday (10:00 AM–3:30 PM). While REACH does not run its own transportation, clients typically travel using Basin Lift, foster providers, or local taxis.

Oregon Department of Human Services

The Oregon Department of Human Services (ODHS) operates Monday–Friday (8 AM–5 PM) and serves people with disabilities, older adults, low-income residents, homeless individuals, veterans, youth, students, tribal members, and those with chronic medical or recovery needs. Programs include Self-Sufficiency and Aging & People with Disabilities. ODHS supports transportation through contracted peer mentors, bus passes, gas vouchers, and NEMT via TransLink. It owns no vehicles, so it has no ADA-accessible fleet. Supported trip types include medical, wellness, work, school, shopping, and social activities, funded through state and federal sources.

Veterans Health Administration

The Veterans Health Administration in Klamath Falls provides weekday (8:00 AM–4:30 PM) transportation for about 100 veterans per month to medical, dental, mental health, and benefits-related appointments. Services include fixed-route and non-emergency medical

transport using ADA-accessible cars and trucks. Rides are booked through a dispatcher, and the program also offers taxi vouchers, mileage and gas reimbursements, and travel-aide support.

Disabled American Veterans

The Klamath Falls Disabled American Veterans (DAV) chapter does not operate its own transportation but uses the DAV Volunteer Transportation Network coordinated through the White City VA. Volunteer drivers pick up veterans at the Klamath Falls VA clinic and take them to VA-authorized appointments in White City, Medford, or Ashland, then return them afterward. Riders schedule trips through the VTN coordinator. The program does not own local vehicles, and most trips are for mental-health appointments.

Klamath County Developmental Disabilities Services

Klamath County Developmental Disabilities Services (KCDDS) serves individuals with intellectual and developmental disabilities, many of whom are also older adults, students, tribal members, or have significant medical needs. The agency does not provide transportation directly; instead, it authorizes Medicaid-funded services such as bus passes, Basin Lift rides, and taxi trips through client plans. KCDDS owns no vehicles and does not schedule rides—its role is limited to approving transportation support for medical, work, school, shopping, senior, and social trips.

Klamath Basin Behavioral Health

Klamath Basin Behavioral Health (KBBH), one of Southern Oregon's largest behavioral health providers, offers transportation primarily when other options fail and a client risks missing essential services. It serves 200–250 clients per month, operating Monday–Friday (7:30 AM–5:00 PM), with some programs occurring after hours. KBBH uses a 20-vehicle fleet (none ADA-accessible) to provide medical, wellness, work, social, and program-related trips, scheduled on an ad hoc basis. The organization also supports clients with transit passes, ride-hail credits, taxi vouchers, mileage and gas reimbursements, and travel training.

Place2Heal

Place2Heal Counseling Services provides mental health and addiction counseling in Klamath Falls. Peer Mentors may provide transportation for treatment-related purposes.

Tayas Yawks

Tayas Yawks offers culturally specific peer support and employment resources for individuals struggling with addiction or those returning to the community after incarceration or treatment. Peer Mentors provide transportation for treatment-related purposes.

Sky Lakes Medical Center

Medical case managers at Sky Lakes Medical Center may provide transport or arrange transportation for clients.

Additional Transportation Services for Seniors

Many senior living communities within Klamath Falls offer client-based transportation services for its residents. Those communities include Klamath Falls Senior Living, Crystal Terrace of Klamath Falls, and Pelican Pointe Assisted Living.



Section 4 Needs and Opportunities

Needs and Opportunities

The transportation needs identified in this section reflect a synthesis of findings from the various public engagement efforts described in Section 2.

Additional information is available in Appendix C.

BTSTD and Quail Trail Public Transit

Because BTSTD and Quail Trail coordinate transit services across overlapping areas, their identified needs are presented jointly to reflect shared challenges, opportunities, and priorities. A summary of key transportation needs follows.

Operations

- **Prioritize core services:** Maintain fixed-route, paratransit, and intercommunity operations using stable local, state, and federal funding. Any service expansion should be sustainable.
- **Optimize demand-response:** Shift contractor dispatching to BTS to increase microtransit capacity.
- **Strengthen regional coordination:** Improve connections for riders traveling beyond the county by coordinating with neighboring transit agencies, hospitals, and human-service providers. Better data-sharing on passes, vouchers, and tokens can also streamline service and support targeted travel training.

Services

- **Expand evening and weekend service**
 - BTSTD reduced service in April 2024 due to funding cuts, limiting access to jobs, medical care, education, and other essential trips outside weekday hours.
 - Restoring or expanding evening/weekend service would address these gaps.
 - Demand-based microtransit or flexible-route services could address service gaps during early morning (6-8am), evening (5-7pm), and weekend periods. **Microtransit** is a flexible, demand-responsive public transportation service that uses smaller, multi-passenger vehicles—such as vans or shuttles—to provide shared rides within a defined service area. Unlike fixed-route buses, microtransit uses dynamic routing and trip requests to match passengers and vehicles in real time. Microtransit could prioritize trip purposes such as medical appointments, employment, education, and essential shopping.

■ **Improve service coverage in unserved and high-need locations**

- Rural and sparsely populated areas remain underserved due to distance and low densities.
- BTSTD should consider restoring Extend Service within Klamath Falls (e.g., Wocus, Henley, Southview) and exploring service to areas like Pine Grove and Running Y.
- A bus stop at New Way is a critical need and may be addressed through partnerships between BTSTD, Quail Trail, and Klamath Tribal Health, potentially via the OIT stop or microtransit.
- Improved access to the Chiloquin wellness center is a priority; Quail Trail could reach it through flexible routing.
- Students traveling between KCC and OIT could benefit from the new state vanpool program.
- For Quail Trail, communication improvements could help riders navigate long distances and weather-related challenges.

■ **Improve regional and intercommunity connectivity**

- Many communities in and outside Klamath County lack regular, reliable transit connections.
- Northern communities (Crescent, Gilchrist, Chemult) remain disconnected and often depend on Deschutes County for essential services.
- Expanded coordination or service would improve access to regional destinations.
- Existing intercity links—POINT (Medford/Brookings), Pacific Crest (Redmond), and Sage Stage (Alturas/Redding/Reno)—should be maintained, but gaps remain (e.g., no regular service to Lakeview).

Facilities

■ **Maintain and enhance BTSTD facilities**

- BTSTD's administrative and maintenance complex supports fixed-route, intercommunity, and paratransit operations.
- As services grow, ongoing investment is needed to maintain capacity, improve efficiency, and support flexible service models.
- BTSTD should develop a Facilities Assessment and Needs Plan to identify safety upgrades, long-term capital needs, equipment replacements (e.g., aging bus wash), fire-code updates, and improvements to offices, maintenance areas, transfer stations, bus stops, seating, and other amenities.

- **Maintain and enhance the Quail Trail operations facility**

- The Chiloquin facility houses administration, operations, dispatch, and vehicle storage near Tribal Administration offices.
- Continued investment will help support expanding services, improve operational efficiency, and strengthen regional coordination.

Vehicle Fleet

- **Maintain existing fleets:** Both BTSTD and Quail Trail rely on diverse vehicles, some of which exceed recommended age and mileage. Regular maintenance and timely replacement are essential for reliability and accessibility.
- **Improve efficiency and right-size vehicles:** Funding constraints limit the purchase of cleaner, more fuel-efficient vehicles. Smaller vehicles better matched to ridership—such as Quail Trail’s planned shift to a small Ford Transit—can reduce costs and improve efficiency.
- **Retain specialized vehicles:** Quail Trail must maintain its all-wheel-drive vehicles to safely reach rural riders over rough terrain.

Information and Technology

- **Centralized transit information:** Riders lack clear, unified information about available services. A single web page or flyer should list all providers and how to use each service, with targeted outreach to populations who need it most. Restoring BTSTD’s Extended Service should be paired with focused marketing.
- **Better rider guidance:** Riders often need clearer instructions on scheduling and using services. BTSTD’s Mobility Manager already offers hands-on training, but broader outreach is needed so more people know about it. Quail Trail drivers help riders transfer to BTSTD and provide free day passes, but this support also needs more public awareness. Clear communication on lead-times and same-day availability would reduce confusion for riders and clinics.
- **Technology enhancements:** BTSTD should evaluate online ride-request tools, real-time tracking, and other upgrades, and continue integrating information into the Transit app. Other providers should also add their service data to the app to give riders a complete view of all options.

Coordination

- **Enhance collaboration among providers:** Many Klamath County transportation providers operate outside Federal 5310 and STIF funding. Better coordination—including sharing vehicles no longer needed by public transit—can improve efficiency.
- **Holder quarterly stakeholder focus groups:** BTSTD, Quail Trail, and partners (e.g., Klamath County Developmental Disability Services, Klamath Tribal Health and Family Services) should meet regularly to identify service gaps, streamline operations, and prioritize needs of vulnerable populations.
- **Improve resource sharing:** Increase provider awareness and formalize coordination to reduce duplicate rides and missed opportunities. A shared pickup/drop-off calendar for common destinations would boost efficiency.
- **Leverage funding:** Work with human service agencies and community partners to identify additional funding sources, integrating these discussions into quarterly meetings.
- **Veterans transportation:** Many veterans needing door-to-door service live outside the urban area. Providers should collaborate to improve access to Klamath Falls, Bend, and Medford.

Marketing/ Advertising/ Education

- **Increase awareness of public transportation options:** Many low-income residents are unaware of available services. Broader outreach could expand ridership.
- **Overcome misconceptions:** Some believe services are only for seniors and people with disabilities. Clear communication that transportation is available to all users can help increase participation.

Human Services Transportation

This section summarizes the key transportation needs of human services populations in Klamath County.

Klamath Tribal Health

Providers noted needs to improve clarity, accessibility, and coordination. Priorities include simplifying program descriptions, expanding ADA-accessible capacity, formalizing after-hours protocols with BTSTD and Basin Medical, and strengthening partnerships with Quail Trail and contracted providers. Increasing awareness of resources like bus passes could also improve service efficiency.

REACH Klamath Falls

Although REACH does not provide transportation, providers saw opportunities to improve coordination for clients using Basin Lift, taxis, or foster-provider rides. Key needs include setting

recurring trip windows aligned with program hours and sharing weekly attendance schedules with BTSTD to ensure consistent, reliable access.

Oregon Department of Human Services

Providers identified needs to streamline access to bus passes, gas vouchers, and non-emergency medical transportation. Priorities include simplifying eligibility and referral pathways to TransLink and BTSTD and creating a shared dashboard to track pass distribution, trip use, and service effectiveness.

Veteran Health Administration

Providers emphasized improving coordination and accessibility for veterans using VA transportation. Key needs include a unified scheduling system for VA, DAV VTN, and BTSTD Wednesday Medford trips, plus a clear rider guide covering eligibility, vouchers, and ADA accommodations. Better communication would enhance reliability and appointment access.

Disabled American Veterans Volunteer Transportation Network

Providers saw opportunities to better align services with BTSTD Veterans on the Go. Needs include synchronizing trip calendars and establishing a simple referral flow from VA clinic staff to both VTN and BTSTD for riders with different mobility needs. Strengthened scheduling and communication would improve service consistency.

Klamath County Developmental Disabilities Services

Providers identified needs to improve access for clients using Medicaid-authorized transportation, bus passes, Basin Lift, and taxis. Priorities include standardizing referral packets with BTSTD and taxi providers, tracking unused transportation benefits, and enhancing coordination to reduce missed trips and support reliable access to daily activities.

Klamath Basin Behavioral Health

Providers noted opportunities to improve accessibility and coordination for clients using KBBH transportation. Needs include expanding ADA capacity through coordination with BTSTD and Basin Lift, implementing a simple scheduling template with standing slots for high-volume programs, and better integrating internal vehicles with external providers to increase reliability.



Section 5 Implementation Plan

Implementation Plan

This section translates the needs and opportunities from Section 5 into actionable strategies and presents them within a proposed implementation timeline. The proposed timeframes to implement strategies are prioritized into Near-Term (0-1 years), Mid-Term (2-3 years), and Long-Term (4-5+ years) timeframes based on initial costs, ongoing costs, ease of implementation, community need, and regional benefit.

- **Initial and Ongoing Costs:** these do not reflect specific cost estimates, but rather order-of-magnitude costs based on input from Basin Transit Service and Quail Trail Public Transit. Specific cost estimates may be developed by BTS for the final plan to aid in grant funding pursuits.
- **Ease of Implementation:** this was determined for each proposed strategy primarily based on whether it will expand upon or modify existing services and/or capital, or if it is a new service and/or new capital. These were further evaluated based on trip distance and if additional resources or coordination with other transportation providers are needed to support the strategy (e.g., additional vehicles, additional drivers, additional staff, etc.).
- **Community Need:** this was determined for each strategy primarily based on the collective input received from the Project Management Team (PMT), Project Advisory Committee (PAC), and public, and considered factors such as the general population density a strategy might serve or if capital expansions are needed to support service expansions with their own level of need.
- **Regional Benefit:** this was determined for each strategy primarily based on whether it enhances existing regional services, expands coverage of existing localized services, and/or increases connection across services that transport riders to regional destinations within Klamath County and beyond.

Table 7 through Table 13 present the recommended strategies and their accompanying implementation timeframes that can enhance transit service across Klamath County. Each criterion rating for each strategy is shaded a specific color to illustrate priority.

Additional information is available in Appendix C.

Table 7. Services Strategies and Implementation

Strategy	Initial Cost	Ongoing Cost	Ease to Implement	Community Need	Regional Benefit	Timeframe	Responsible Provider
Initiate transit service in the Klamath County northern district (Gilchrist, Crescent, Chemult, etc.).	\$	\$\$	Moderate	High	High	In progress	BTS
Increase Veterans on the Go trips between Klamath Falls and Medford to twice per week for Veteran Administration approved appointments.	\$	\$\$	Moderate	High	High	In progress	BTS
Investigate capacity to deviate the fixed-route service in Chiloquin to provide direct access to the Wellness Center.	\$	\$	Moderate	High	Low	Short-Term (0-1 Years)	Quail Trail
Expand service within Sprague River.	\$	\$\$	Easy	High	High	Short-Term (0-1 Years) / Ongoing	Quail Trail
Develop a plan to provide microtransit service on weekday mornings and evenings (6-8AM and 5-7PM) within the Klamath Falls urban area. Implementation depends on available and stable funding.	\$	\$\$	Moderate	High	Low	Mid-Term (2-3 Years)	BTS
Develop a plan to provide microtransit service on weekends within the Klamath Falls urban area. Implementation depends on available and stable funding.	\$	\$	Moderate	High	Low	Mid-Term (2-3 Years)	BTS

Table 8. Facility Strategies and Implementation

Strategy	Initial Cost	Ongoing Cost	Ease to Implement	Community Need	Regional Benefit	Timeframe	Responsible Provider
Enhance bus stop amenities for high use stop locations (e.g., shelters, benches, route maps, etc.).	\$\$\$	\$	Moderate	High	Moderate	In progress	BTS, Quail Trail
Develop a Facilities Plan for improvements to buildings for offices, maintenance, storage, and parking. Plan to include transfer stations, shelters, bus stops, benches, and other amenities.	\$	\$	Moderate	High	Moderate	Mid-Term (2-3 Years)	BTS
Improve and maintain administrative, operations, maintenance, and storage facilities for transit services.	\$\$\$	\$	Difficult	Low	Moderate	Long-Term (4-5+ Years)	BTS, Quail Trail
Coordinate with agency partners on improving walking and biking infrastructure connecting to bus stops.	\$\$\$	\$	Difficult	High	Low	Long-Term (4-5+ Years)	BTS, Quail Trail

Table 9. Vehicle Fleet Strategies and Implementation

Strategy	Initial Cost	Ongoing Cost	Ease to Implement	Community Need	Regional Benefit	Timeframe	Responsible Provider
Maintain preventive vehicle maintenance program.	\$	\$\$	Easy	High	High	Ongoing	BTS, Quail Trail
Replace vehicles that meet mileage and years of service requirements.	\$\$\$	\$	Moderate	Moderate	Moderate	Ongoing	BTS, Quail Trail
Develop a vehicle replacement plan for all transit vehicles. Investigate the benefits and costs of acquiring fuel-efficient/right-sized vehicles and ADA needs.	\$	\$	Easy	Moderate	Moderate	Short-Term (0-1 Years) / Ongoing	BTS, Quail Trail
Increase ADA-accessible vehicles.	\$\$\$	\$\$	Difficult	Moderate	Moderate	Mid-Term (2-3 Years)	KTHFS, KBBH

KTHFS: Klamath Tribal Health & Family Services; KBBH: Klamath Basin Behavioral Health

Table 10. Information and Technology Strategies and Implementation

Strategy	Initial Cost	Ongoing Cost	Ease to Implement	Community Need	Regional Benefit	Timeframe	Responsible Provider
Monitor bus pass distribution and track pass usage to inform and coordinate future resource allocation.	\$	\$	\$\$	Moderate	Moderate	Ongoing	ODHS, BTS
Deploy a transit app with real-time bus tracking capabilities.	\$\$	\$	Moderate	High	High	In progress	BTS, BMT
Create a centralized web page that lists and maps all transit services in the county, booking channels, hours, fares, eligibility, weblinks to individual provider websites, etc.; consider hosting on Klamath County and city websites.	\$	\$	Moderate	High	High	Short-Term (0-1 Years)	BTS, Quail Trail, Klamath County, cities, KTHFS, ODHS, BMT, REACH, VHA, DAV, KCDDS, KBBH, SLMC
Create and distribute printed and social media materials that list and map all services in the county and provide weblinks to individual provider websites for more details (booking channels, hours, fares, eligibility, etc.).	\$	\$	Moderate	High	High	Short-Term (0-1 Years)	BTS, Quail Trail, Klamath County, cities, KTHFS, ODHS, BMT, REACH, VHA, DAV, KCDDS, KBBH, SLMC

KTHFS: Klamath Tribal Health & Family Services; ODHS: Oregon Department of Human Services; BMT: Basin Medical Transportation; VHA: Veterans Health Administration; DAV: Disabled American Veterans; KCDDS: Klamath County Developmental Disabilities Services; KBBH: Klamath Basin Behavioral Health; SLMC: Sky Lakes Medical Center

Table 11. Operations Strategies and Implementation

Strategy	Initial Cost	Ongoing Cost	Ease to Implement	Community Need	Regional Benefit	Timeframe	Responsible Provider
Manage operation funding to maintain personnel, material and services for current transit operations with current local, state, and federal funding revenue.	\$	\$\$\$	Moderate	High	High	Ongoing	BTS, Quail Trail
Hire a BTS Grant Manager/Procurement position to ensure funding revenue and usage.	\$	\$	Moderate	Moderate	Moderate	Short-Term (0-1 Years)	BTS
Hire additional driver for expanded service within Sprague Rier.	\$	\$\$	Difficult	High	High	Short-Term (0-1 Years)	Quail Trail
Investigate a local funding mechanism to support match dollars for federal dollars (including contracting with Translink) and support Veteran riders outside of Klamath Falls.	\$	\$	Moderate	High	High	Short-Term (0-1 Years)	Quail Trail
Relocate the contractor dispatching center for contracted Demand Response Services to BTS Dispatching Center to optimize microtransit service.	\$	\$\$	Moderate	High	Low	Mid-Term (2-3 Years)	BTS
Study and develop an extended service program in the District that targets populations that would benefit.	\$	\$\$	Moderate	Moderate	Moderate	Mid-Term (2-3 Years) / Ongoing	BTS, Quail Trail, KTHFS, ODHS, BMT, REACH, VHA, DAV, KCDDS, KBBH, SLMC

Coordinated Human Services Public Transportation Plan

Basin Transit Service Transportation District & The Klamath Tribes Quail Trail Public Transit

Implementation Plan

Strategy	Initial Cost	Ongoing Cost	Ease to Implement	Community Need	Regional Benefit	Timeframe	Responsible Provider
Increase operational capacity through growing staff resources.	\$	\$\$	Moderate	High	Moderate	Mid-Term (2-3 Years)	Quail Trail
Investigate ability to support a local mechanic for vehicle fleet maintenance in Chiloquin; requires coordination with other Klamath Tribes departments.	\$\$\$	\$\$	Difficult	Moderate	Moderate	Long-Term (4-5+ Years)	Quail Trail, KTHFS

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Table 12. Coordination Strategies and Implementation

Strategy	Initial Cost	Ongoing Cost	Ease to Implement	Community Need	Regional Benefit	Timeframe	Responsible Provider
Schedule semi-annual meetings between BTS, Quail Trail, and Human Service Agencies. Use these meetings to identify targeted service gaps/strategies and funding opportunities.	\$	\$	Easy	High	High	Short-Term (0-1 Years) / Ongoing	BTS, Quail Trail, KTHFS, ODHS, BMT, REACH, VHA, DAV, KCDDS, KBBH, SLMC
Improve coordination amongst regional providers regarding services to countywide veteran riders with specific needs.	\$	\$\$	Moderate	High	High	Short-Term (0-1 Years) / Ongoing	BTS, Quail Trail, KTHFS, VHA, DAV, KCDDS
Update the BTS Transit System 2013 Master Plan.	\$\$	\$	Moderate	High	High	Mid-Term (2-3 Years)	BTS, Quail Trail
BTS, with ODOT, OIT, and KCC review the State’s vanpool service available to students. Develop a partnership where all organizations plan and provide necessary oversight and implementation.	\$	\$	Difficult	High	High	Mid-Term (2-3 Years)	BTS, ODOT, OIT, KCC
Create shared pickups/drop-offs calendar for common destinations.	\$	\$	Moderate	Moderate	High	Mid-Term (2-3 Years) / Ongoing	BTS, Quail Trail, KTHFS, ODHS, BMT, REACH, VHA, DAV, KCDDS, KBBH, SLMC

Strategy	Initial Cost	Ongoing Cost	Ease to Implement	Community Need	Regional Benefit	Timeframe	Responsible Provider
Improve coordination for clients who rely on Medicaid authorized transportation and vouchers. Track approved but unused transportation benefits to inform and coordinate future resource allocation.	\$	\$\$	Moderate	High	Moderate	Mid-Term (2-3 Years) / Ongoing	KCDDS, BTS
Investigate coordination opportunities to connect riders between Klamath County and Lake County (e.g., Bly to Lakeview).	\$	\$	Difficult	Moderate	High	Mid-Term (2-3 Years) / Ongoing	BTS, Quail Trail
Improve regional coordination by establishing collaborative partnerships and sharing data with providers that operate within and adjacent to Klamath County.	\$	\$	Moderate	High	High	Mid-Term (2-3 Years) / Ongoing	BTS, Quail Trail, BMT, REACH, Point, Pacific Crest, Lake County Transit, Sage Stage
Coordinate with hospital discharge planners and human service agencies on post-discharge rides.	\$	\$\$	Moderate	Moderate	Moderate	Mid-Term (2-3 Years) / Ongoing	BTS, Quail Trail, KTHFS, ODHS, BMT, REACH, VHA, DAV, KCDDS, KBBH, SLMC

Coordinated Human Services Public Transportation Plan

Basin Transit Service Transportation District & The Klamath Tribes Quail Trail Public Transit

Implementation Plan

Strategy	Initial Cost	Ongoing Cost	Ease to Implement	Community Need	Regional Benefit	Timeframe	Responsible Provider
Establish resource sharing protocols to reduce duplicate trips, create centralized inventory of vehicles and assets, and share dispatch data to optimize routes.	\$\$	\$\$	Difficult	Low	Moderate	Long-Term (4-5+ Years) / Ongoing	BTS, Quail Trail, KTHFS, ODHS, BMT, REACH, VHA, DAV, KCDDS, KBBH, SLMC

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Table 13. Marketing and Education Strategies and Implementation

Strategy	Initial Cost	Ongoing Cost	Ease to Implement	Community Need	Regional Benefit	Timeframe	Responsible Provider
Increase awareness and interest in public transportation.	\$	\$	Moderate	High	High	Short-Term (0-1 Years) / Ongoing	BTS, Quail Trail, KTHFS, ODHS, BMT, REACH, VHA, DAV, KCDDS, KBBH, SLMC
Overcome misconceptions about eligibility to ride certain services.	\$	\$	Moderate	High	High	Short-Term (0-1 Years) / Ongoing	BTS, Quail Trail, KTHFS, ODHS, BMT, REACH, VHA, DAV, KCDDS, KBBH, SLMC
Define and plan advertising strategies for Extended Service.	\$	\$	Easy	High	Moderate	Short-Term (0-1 Years) / Ongoing	BTS
Advertise all public transit services available in Klamath County.	\$	\$	Moderate	High	High	Short-Term (0-1 Years) / Ongoing	BTS, Quail Trail, KTHFS, ODHS, BMT, REACH, VHA, DAV, KCDDS, KBBH, SLMC
Increase promotion/advertising of Quail Trail bus transfer assistance to BTS services and accompanying free day pass.	\$	\$	Easy	High	High	Short-Term (0-1 Years) / Ongoing	Quail Trail, BTS

Strategy	Initial Cost	Ongoing Cost	Ease to Implement	Community Need	Regional Benefit	Timeframe	Responsible Provider
Advertise the State’s vanpool program to OIT and KCC students.	\$	\$	Moderate	High	Moderate	Mid-Term (2-3 Years) / Ongoing	BTS, Quail Trail, ODOT, OIT, KCC
Maintain and expand to key populations the mobility manager outreach with hands-on rider training sessions at areas of interest, monthly “ride coaching” workshops, and publish a yearly calendar. Consider creating rider instructional videos to post to provider webpages. Especially critical for target populations.	\$\$	\$\$	Moderate	Moderate	Moderate	Mid-Term (2-3 Years)	BTS, Quail Trail

KTHFS: Klamath Tribal Health & Family Services; ODHS: Oregon Department of Human Services; BMT: Basin Medical Transportation; VHA: Veterans Health Administration; DAV: Disabled American Veterans; KCDDS: Klamath County Developmental Disabilities Services; KBBH: Klamath Basin Behavioral Health; SLMC: Sky Lakes Medical Center



Appendix A
Stakeholder Engagement
Memorandum



Appendix B Existing Services Memorandum



Appendix C Needs and Opportunities Memorandum



Public Input

***Public input to the Board regarding Transit
Coordinated Human Services Transportation
Plan Final Draft Presentation***



ACTION

***Board of Directors vote to adopt the Transit Coordinated
Human Services Transportation Plan***



GENERAL MANAGER'S REPORT



General Manager Report

Service Delivery

Primary Objective

- Basin Connect North: 4 riders; recommendation to be issued in June 2026 if low ridership continues

Strategic Alignment

- Jennifer Boardman, BTS assigned ODOT Regional Transit Coordinator

Improving the Organization

Facilities & Infrastructure

- 1 APR: Published Facilities Improvement Plan RFP
- 1125 Roof Repair in progress
- APR 26: BTS's customer access concrete repair
- APR 26: Cameras install at 2 transfer stations

Leading People

Training

- MAR: Supervisors & Lead Mechanic completed Supervisor Training in progress
- Mobility Coordinator: paratransit management certification in progress

Managing Resources

Resource Management

- Proactive data & common-sense driven course of action to respond to increasing fuel costs: in progress



ACTION

Board of Directors vote to approve BTS Safety Program

BASIN TRANSIT SERVICE



SAFETY COMMITTEE





BASIN TRANSIT PROGRAM POLICY
BOARD OF DIRECTOR APPROVAL PENDING
SAFETY PROGRAM
CAO 14 JAN 2026

COMPLIANCE WITH THIS PUBLICATION IS MANDATORY

ACCESSIBILITY: Publications available by request to Chair of Safety Committee or Safety Manager

RELEASABILITY: There are no releasability restrictions on this publication

References: OSHA Safety Training Plan Template

1. INTRODUCTION

1.1 Training is one of the most important components within Basin Transit Services Transportation District's safety management system. It gives employees an opportunity to learn their jobs properly, bring new ideas into the workplace, reinforce existing ideas and practices, and it helps to put our Safety and Health Program into action.

Everyone in our company will benefit from safety and health training through fewer workplace injuries and illnesses, reduced stress, and higher morale. Productivity, profits, and competitiveness will increase as production costs per unit, turnover, and workers compensation rates lower.

2. MANAGEMENT COMMITMENT

2.1 Basin Transit Services Transportation District will provide the necessary funds and scheduling time to ensure effective safety and health training is provided. This commitment will include paid work time for training and training in the language that the worker understands. Both management and employees will be involved in developing the program.

2.2 To most effectively carry out their safety responsibilities, all employees must understand the following:

- (1) their role in the program,
- (2) the hazards and potential hazards that need to be prevented or controlled, and
- (3) the ways to protect themselves and others. We will achieve these goals by:
 - educating everyone on the natural and system consequences of their actions;
 - educating all managers, supervisors and employees on their safety management system responsibilities;

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- educating all employees about the specific hazards and control measures in their workplace;
 - training all employees on hazard identification, analysis, reporting and control procedures; and
 - training all employees on safe work procedures and practices.

2.3 Our training program will focus on health and safety concerns that determine the best way to deal with particular hazards or circumstances. When a hazard is identified, we will first try to remove it entirely. If that is not feasible, we will then train workers to protect themselves, if necessary, against the remaining hazard. Once we have decided that a safety or health problem can best be addressed by training (or by another method combined with training), we will follow up by developing specific training goals based on those particular needs.

2.3.1 Employees. At a minimum, employees must know the general safety and health rules of the worksite, specific site hazards and the safe work practices needed to help control exposure, and the individual's role in all types of emergency situations. We will ensure all employees understand the hazards to which they may be exposed and how to prevent harm to themselves and others from exposure to these hazards.

2.3.2 We will commit available resources to ensure employees receive safety and health training during the circumstances below.

- Whenever a person is hired --general safety orientation including an overview of company safety rules, and why those rules must be followed.
- Whenever an employee is given a new job assignment --during formal classroom training, and again, when the supervisor provides specific task training. It's extremely important that supervisors emphasize safety during initial task assignment.
- Whenever new work procedures are begun --during formal classroom training and supervisor on-the-job training.
- Whenever new equipment is installed --if new hazards are introduced.
- Whenever new substances are used --hazard communication program may apply.
- The bottom line --train safety whenever a new hazard is introduced to the employee.

2.3.3 Employees must know they are responsible for complying with all company safety rules, and that most accidents will be prevented by their safe work practices. They must be very familiar with any personal protective equipment required for their jobs. They must know what to do in case of emergencies.

2.3.4 Each employee needs to understand that they are not expected to start working a new assignment until they have been properly trained. If a job appears to be unsafe, they will report the situation to their supervisor.

2.4 Supervisors. Supervisors will be given special training to help them in their leadership role. They will be taught to look for hidden hazards in the work under their supervision; insist on the maintenance of the physical protection in their areas; and reinforce employee hazard training through performance feedback and consistent enforcement when necessary.

2.4.1 We will commit necessary resources to ensure supervisors understand the responsibilities below and the reasons for them:

- Detecting and correcting hazards in their work areas before they result in injuries or illnesses
- Providing physical resources and psychosocial support that promote safe work
- Providing performance feedback and effective recognition and discipline techniques
- Conducting on-the-job training

2.4.2 Supervisors are considered the primary safety trainers. All supervisors will complete train-the-trainer classes to learn training techniques and how to test employee knowledge and skills. They will also receive training on how to apply fair and consistent recognition and discipline. Supervisor training may be provided by the supervisor's immediate manager, by the Safety Department, or by outside resources.

2.5 Managers. All managers must understand their responsibilities within our Safety and Health Program. This may require classroom training and other forms of communication. Formal classroom training may not be necessary. The subject can be covered periodically as a part of regular management meetings.

2.5.1 Managers will be trained in the following subject areas:

- The elements of the safety management system, and the positive impact the various processes within the system can have on corporate objectives;
- Their responsibility to communicate the Safety and Health Program goals and objectives to their employees;
- Their role that includes making clear assignments of Safety and Health Program responsibilities, providing authority and resources to carry out assigned tasks, and holding subordinate managers and supervisors accountable; and
- Actively requiring compliance with mandatory Safety and Health Program policies and rules and encouraging employee involvement in discretionary safety activities such as making suggestions and participation in the safety committee.

2.5.2 Training will emphasize the importance of managers' visibly showing their commitment to the safety and health program. They will be expected to set a good example by scrupulously following all the safety and health rules themselves.

2.6 Incentives, Recognition and Reward

The purpose of an effective incentive/recognition process is to motivate employee involvement and build ownership in our safety culture. When employees make suggestions that improve our safety training, we will formally recognize their contributions. When employees make a significant contribution that meets established criteria, we will recognize and award tangible rewards. Employees will submit all suggestions directly to immediate supervisors. Supervisors are authorized to recognize/reward employees on-the-spot when the suggestion substantially improves the training process or content.

3. TRAINING AND ACCOUNTABILITY

3.1 We understand that training without accountability is ineffective. Our safety culture must support training. A culture of consequences is essential. To help make sure our efforts in safety and health are effective we have developed methods to measure performance and administer consequences. Supervisors and managers must understand that their first responsibility is to make sure they have met their obligations to their employees before considering disciplinary action. All disciplinary action is outlined in the current Collective Bargaining Agreement effective July 2025.

3.2 Managers and safety staff will be educated on the elements (processes) within the safety accountability system. The safety committee will be trained on, and continually evaluate, our safety accountability system. Training will focus on improving the Safety and Health Program whenever hazardous conditions and unsafe or inappropriate behaviors are detected. Safety orientation will emphasize that compliance with safety policies, procedures, and rules as outlined in the safety plan is a condition of employment. Discipline will be administered to help the employee increase desired behaviors, not to in any way punish. An explanation of the natural and system consequences of behavior/performance will be addressed in every safety training session.

4. TYPES OF TRAINING

4.1 Required rules-related training will be conducted according to guidelines detailed in OSHA. We will also coordinate safety committee members hazard awareness and the principles of accident investigation trainings in accordance with OSHA requirements.

4.2 The Human Resource and Safety Manager will ensure Safety and Health Program training is in full compliance with OSHA standards. In general safety training will be conducted on the following levels:

- **General Safety Education:** See Training Schedule (Annex A).

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- **Specific Safety Training:** S See Training Schedule (Annex A).

4.3 New Employee Orientation. The format and extent of orientation training will depend on the complexity of hazards and the work practices needed to control them. Orientation will include a combination of initial classroom and follow-up on-the-job training (OJT).

- For some jobs, orientation may consist of a quick review of site safety and health rules; hazard communication training for the toxic substances present at the site; training required by relevant OSHA standards, e.g., fire protection, lockout/tagout, etc; and, a run-through of the job tasks. This training will be presented by the new employee's supervisor or delegated employee.
- For larger tasks with more complex hazards and work practices to control them, orientation will be structured carefully. We will make sure that our new employees start the job with a clear understanding of the hazards and how to protect themselves and others.

4.4 We will follow up supervisory training with a buddy system, where a worker with lengthy experience is assigned to watch over and coach a new worker, either for a set period of time or until it is determined that training is complete. Whether the orientation is brief or lengthy, the supervisor will make sure that before new employees begin the job, they receive instruction in responding to emergencies. All orientation training received will be properly documented.

4.5 The new employee curriculum requires training to include: See Training Schedule (Annex A).

4.6 On-the-Job Training (OJT). OJT training relates principles and theories to work skills that are then taught and applied in the work environment. OJT is designed to reinforce formal classroom training. All new-hire employees require training to perform their jobs effectively. In this regard, OJT is an essential supplement to formal classroom training. OJT assignments may be provided concurrently with formal training to emphasize and complement material covered in formal training courses. Time allotted to accomplish OJT assignments should be compatible with the new-hire's current knowledge, skill, and experience levels. The employee's supervisor should assess the employee's ability to successfully complete OJT training.

4.7 Experienced workers. Will be trained if the installation of new equipment changes their job in any way, or if process changes create new hazards or increase previously existing hazards.

4.8 All workers. Will receive refresher training as necessary to keep them prepared for emergencies and alert them to ongoing housekeeping problems.

4.8.1 The schedule for contingent safety training is Training Schedule (Annex A).

4.9 Personal Protective Equipment (PPE). Workers needing to wear personal protective equipment (PPE) and persons working in high risk situations will need special training. Supervisors and workers alike must be taught the proper selection, use, and maintenance of PPE. Since PPE sometimes can be cumbersome, employees may need to be motivated to wear it in every situation where protection is necessary. Therefore, training will begin with a clear explanation of why the equipment is necessary, how its use will benefit the wearer, and what its limitations are.

Remind your employees of your desire to protect them and of your efforts, not only to eliminate and reduce the hazards, but also to provide suitable PPE where needed. Individual employees will become familiar with the PPE they are being asked to wear. This is done by handling it and putting it on. Training will consist of showing employees how to put the equipment on, how to wear it properly, and how to test for proper fit and how to maintain it. Proper fit is essential if the equipment is to provide the intended protection. We will conduct periodic exercises in finding, donning, and properly using emergency personal protective equipment and devices.

4.10 Vehicular Safety. All workers operating a motor vehicle on the job (on or off premises) will be trained in its safe vehicle operation, safe loading and unloading practices, safe speed in relation to varying conditions, and proper vehicle maintenance. We will emphasize in the strongest possible terms the benefits of safe driving and the potentially fatal consequences of unsafe practices.

4.11 Emergency Response. We will train our employees to respond to emergency situations in accordance with Basin Transit Service's Emergency Action Plan.

4.12 We will practice evacuation drills at least semi-annually, so that every employee has a chance to recognize the signal and evacuate in a safe and orderly fashion. Supervisors or their alternates will practice counting personnel at evacuation gathering points to ensure that every worker is accounted for. We will include procedures to account for visitors, contract employees, and service workers such as cafeteria employees. At sites where weather or earthquake emergencies are reasonable possibilities, additional special instruction and drilling will be given.

4.13 Periodic Safety and Health Training. At some worksites, complex work practices are necessary to control hazards. Elsewhere, occupational injuries and illness are common. At such sites, we will ensure that employees receive periodic safety and health training to refresh their memories and to teach new methods of control. New training will also be conducted as necessary when OSHA standards change, or new standards are issued. Where the work situation changes rapidly, monthly meetings will be conducted as needed. These meetings will remind workers of the upcoming week's tasks, the environmental changes that may affect them, and the procedures they may need to protect themselves and others.

4.14 Identifying types of training. Specific hazards that employees need to know about should be identified through total site health and safety surveys, job hazard analysis, and change analysis. Accident and injury records may reveal additional hazards and needs for training. Near-miss reports, maintenance requests, and employee suggestions may uncover still other hazards requiring employee training.

5. SAFETY COMMITTEE

5.1 Monitoring the safety programs is critical to ensure success of the training program. Monitoring provides information to staff regarding the benefits and effectiveness of the training received. To ensure proper monitoring of safety issues and training, Basin Transits Services Transportation District will establish a Safety Committee comprised of both staff and management. See Safety Committee Bylaws Annex B.

6. SAFETY TRAINING PROGRAM EVALUATION

6.1 An evaluation of the effectiveness of the training program will be conducted annually. Staff from the Safety Committee will review protocol with managers, supervisors and employees who have participated in the safety program to determine the effectiveness of the training, and to obtain suggestions for program improvement.

6.2 Evaluation will help determine whether the training provided has achieved its goal of improving employee safety and performance. When carefully developed and carried out, the evaluation will highlight training program strengths and identify areas of weakness that need change or improvement.

- Evaluation will include analysis of employee attendance at training sessions. Training will not work for an employee who does not show up. Absenteeism can signal a problem with the worker, but it can also indicate a weakness in training content and presentation.
- We will compare pre-and post-training injury and accident rates overall. The periods of time being compared must be long enough to allow significant differences to emerge if training has made a difference.
- We will determine whether the training provided has achieved its goal of improving employee safety performance. Evaluation will highlight training program strengths and identify areas of weakness that need change or improvement.

Management will evaluate training through the following methods:

- observing employee skills;
- surveys and interviews to determine employee knowledge and attitudes about training;
- reviewing the training plan and lesson plans;
- comparing training conducted with hazards in the workplace;
- reviewing training documents; and
- comparing pre-and post-training injury and accident rates.

If evaluation determines program improvement is necessary, the safety committee/coordinator will develop recommendations.

BASIN TRANSIT SERVICE TRANSPORTATION DISTRICT

SAFETY TRAINING PROGRAM POLICY FRAMEWORK

OSHA 29 CFR & FTA / PTASP–ALIGNED

1. REGULATORY FRAMEWORK

This Safety Training Program is designed to comply with:

- **OSHA 29 CFR 1910** – General Industry Safety Standards
- **49 CFR Part 673** – Public Transportation Agency Safety Plan (PTASP)
- **49 CFR Part 674** – State Safety Oversight (where applicable)
- **FTA Safety Management System (SMS) Framework**
- **FTA Triennial Review Program**
- **National Transit Database (NTD) Safety Reporting Requirements**

This program supports Basin Transit Service Transportation District’s **Agency Safety Plan (ASP)** and Safety Management System.

2. SAFETY MANAGEMENT SYSTEM (SMS) INTEGRATION

FTA Basis: 49 CFR §673.23

Safety training supports all four SMS components:

1. **Safety Management Policy** – Defined roles, accountability, and leadership commitment
2. **Safety Risk Management (SRM)** – Hazard identification and mitigation training
3. **Safety Assurance (SA)** – Training evaluation, audits, and performance monitoring
4. **Safety Promotion** – Training, communication, and employee engagement

3. SAFETY MANAGEMENT POLICY

FTA Basis: 49 CFR §673.23(a)

Basin Transit Service Transportation District’s executive leadership affirms its commitment to safety by:

- Providing adequate resources for training
- Establishing clear roles and responsibilities



- Ensuring training is mandatory and documented
 - Supporting a non-punitive safety reporting culture
-

4. SAFETY PROMOTION – TRAINING & COMMUNICATION

FTA Basis: 49 CFR §673.29

4.1 Employee Safety Training

All employees shall receive safety training appropriate to their job functions, including:

- General safety awareness
- Job-specific hazards
- Emergency response procedures
- Fatigue awareness and human factors
- Reporting hazards, incidents, and near-misses

Training shall be provided:

- Upon hire
- When job duties change
- When new hazards are introduced
- As refresher training at defined intervals

5. SAFETY RISK MANAGEMENT (SRM)

FTA Basis: 49 CFR §673.25

Employees, supervisors, and managers shall be trained in:

- Hazard identification and analysis
- Risk assessment methodologies
- Implementation of risk mitigations
- Reporting safety concerns through established channels

Training supports the identification of safety risks related to:

- Vehicle operations
 - Maintenance activities
 - Facilities and infrastructure
 - Human factors and fatigue
 - Environmental and weather conditions
-

6. SAFETY ASSURANCE



FTA Basis: 49 CFR §673.27

Safety training effectiveness shall be monitored through:

- Performance observations
- Incident, accident, and near-miss trend analysis
- Corrective action tracking
- Safety audits and inspections
- Employee feedback and surveys

Training deficiencies identified through Safety Assurance activities shall result in corrective or supplemental training.

7. ROLES AND RESPONSIBILITIES (FTA-SPECIFIC)

7.1 Accountable Executive

FTA Basis: 49 CFR §673.5

The Accountable Executive:

- Ensures sufficient resources for training
- Approves safety policies and training programs
- Is accountable for safety performance

7.2 Safety Manager

FTA Basis: 49 CFR §673.7

The Safety Manager:

- Oversees training program implementation
- Ensures alignment with the Agency Safety Plan
- Coordinates safety data and training documentation
- Reports training effectiveness to executive leadership

7.3 Supervisors and Managers

Supervisors and managers:



- Reinforce safety training daily
- Ensure employees are trained before assignment
- Participate in hazard identification and SRM activities
- Support a non-punitive reporting culture

8. TRANSIT-SPECIFIC TRAINING REQUIREMENTS

8.1 Vehicle Operations

FTA Guidance & OSHA General Duty Clause

Operators shall receive training in:

- Defensive driving
- Speed management
- Passenger safety
- Distraction avoidance
- Adverse weather operations
- Fatigue and fitness-for-duty awareness

8.2 Maintenance and Facilities

FTA & OSHA Alignment

Maintenance employees shall receive training in:

- Lockout/Tagout (29 CFR 1910.147)
- Hazard Communication (29 CFR 1910.1200)
- Confined space awareness (if applicable)
- Fall protection and machine guarding
- Safe use of tools and equipment

8.3 Emergency Management

FTA Basis: 49 CFR §673.29(b)



Employees shall be trained on:

-
- Emergency Action Plan procedures
 - Evacuation and accountability
 - Coordination with first responders
 - Passenger assistance during emergencies

9. SAFETY REPORTING AND NON-PUNITIVE CULTURE

FTA Basis: 49 CFR §673.23(b)

Basin Transit Service Transportation District supports a **just culture** approach:

- Employees are encouraged to report hazards and near-misses
- Reports will not result in discipline except in cases of willful disregard, recklessness, or illegal acts
- Training reinforces reporting expectations and protections

10. SAFETY COMMITTEE

FTA Basis: 49 CFR §673.23(d)

The Safety Committee:

- Includes labor and management representatives
- Reviews safety performance and training effectiveness
- Participates in SRM and SA activities
- Recommends program improvements

(See **Annex B – Safety Committee Bylaws**)

11. DOCUMENTATION AND RECORDKEEPING

FTA & OSHA Basis

All safety training shall be:

- Documented



- Retained per recordkeeping requirements
- Available for FTA Triennial Review, SSOA, and OSHA inspection

Records shall include:

- Employee name
- Training topic
- Date and duration
- Instructor
- Assessment results, where applicable

12. PROGRAM EVALUATION AND CONTINUOUS IMPROVEMENT

FTA Basis: 49 CFR §673.27

The Safety Committee and Safety Manager shall:

- Evaluate training effectiveness
- Review safety performance metrics
- Recommend corrective actions
- Update training based on operational changes

13. FTA TRIENNIAL REVIEW READINESS

This program supports compliance with:

- **Agency Safety Plan requirements**
- **Training and qualification standards**

Training documentation and evaluation records shall be maintained to demonstrate compliance.

7. CERTIFICATION

Reviewed by (Signature)

Date



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🌐 www.basitransit.com

Approved by (Signature)

Date



EXHIBIT A: Safety Committee Bylaws

BASIN TRANSIT PROGRAM

14 JANUARY 2026

Safety Committee Bylaws

COMPLIANCE WITH THIS PUBLICATION IS MANDATORY

ACCESSIBILITY: Publications available by request to Chair of Safety Committee or Safety Manager

RELEASABILITY: There are no releasability restrictions on this publication

References: OSHA Safety Committee Bylaws template.

Oregon OSHA does not require a safety committee to have bylaws. However, bylaws contribute to a committee's stability as a written record of how the committee conducts its business. Basin Transit will create and sustain Safety Committee bylaws in order to maintain an effective and sustainable program

1. PURPOSE

The name of this safety committee is the BTS Safety Committee The purpose of this safety committee is to establish a culture at Basin Transit Service that maintains a safe, healthy workplace through education, training hazard identification and cohesive recommendation and effort to prevent them.

2. OBJECTIVES

The safety committee has four objectives:

1. Involve employees in achieving a safe, healthful workplace.
2. Promptly review all safety-related incidents, injuries, accidents, illnesses, and deaths.
3. Conduct quarterly workplace inspections, identify hazards, and recommend methods for eliminating or controlling the hazards.
4. Annually evaluate Basin Transit Service workplace safety and health program and recommend improvements to management.

3. REPRESENTATIVES

The safety committee will have four (4) voting representatives. Four (2) representatives will represent employees and Four (2) will represent management in addition to the Safety Manager who will be present to provide guidance and information but not be a voting member. Employee representatives can volunteer, or their peers can elect them. Management representatives will be selected by management. Each representative will serve a continuous term of at least one year. Terms will be staggered so that at least one experienced representative always serves on the committee. Appointment letters will be on file and renewed every year or based on personnel changes.

OFFICERS

The safety committee will have two officers: chair and vice-chair. One officer will represent labor and one officer will represent management. Appointment letters will be on file and renewed every year or based on personnel changes.

Terms of Service

Chair and vice-chair each will serve a one-year term.

Duties of the chair

- Schedule regular monthly meetings.
- Develop written agendas for conducting meeting
- Facilitate the committee meeting
- Approve committee correspondence and reports
- Supervise the preparation of meeting minutes
- Coordinate with the Safety Manager to implement actionable items
- Researches and reports industry trends

Duties of the vice-chair

- In the absence of the chair, assume the duties of the chair
- Perform other duties as directed by the chair

Election of chair and vice-chair

The election of a new chair or vice-chair will be held during the monthly committee meeting before the month in which the incumbent's term expires. If the chair or vice-chair leaves office before the term expires, an election will be held during the next scheduled safety committee meeting; the elected officer will serve for the remainder of the term.

4. TRAINING

New representatives will receive training in safety committee functions, hazard identification, and procedures for investigating accidents. OR-OSHA will provide training through its occupational safety and health workshops and online courses. Refer to Safety Management Committee Training Guide.

4. MEETINGS

The safety committee will meet the second Wednesday at 6:00 AM each month, except when the committee conducts quarterly workplace safety inspections. The committee is to follow the schedule below for calendar year 2026:

- **January:** Wednesday, **Jan 14, 2026**
- **February:** Wednesday, **Feb 11, 2026**
- **March:** Wednesday, **Mar 13, 2026: INSPECTION (Facilities) & Safety Committee Training – ALL DAY**
- **April:** Wednesday, **Apr 8, 2026**
- **May:** Wednesday, **May 13, 2026 - INSPECTION: SDS**
- **June:** Wednesday, **Jun 10, 2026**
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- **September:** Wednesday, **Sep 9, 2026**
- **October:** Wednesday, **Oct 14, 2026**
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- **December:** Wednesday, **Dec 9, 2026 - Elections**

Attendance and alternates

Each representative will attend regularly scheduled safety committee meetings and participate in quarterly workplace inspections and other committee activities. Any representative unable to attend a meeting will appoint an alternate and inform the chair before the meeting. An alternate attending a meeting on behalf of a regular representative will be a voting representative for that meeting.

Agenda

The agenda will state the order in which the safety committee conducts its business. The agenda also will include the following when applicable:

- A review of new safety and health concerns
- A status report of employee safety and health concerns under review
- A review of all workplace near misses, accidents, illness, or deaths occurring since the last committee meeting



Minutes

Minutes will be recorded at each safety committee meeting and be distributed by posting on the bulletin board to all company employees. The committee will submit a copy of the minutes to the Basin Transit Service Administration Office of Basin Transit Service; the office will retain the copy for three years. All reports, evaluations, and recommendations of the committee will be included in the minutes. The minutes also will identify representatives who attended monthly meetings and representatives who were absent.

Voting quorum

Three voting representatives constitute a quorum. A majority vote of attending representatives is required to approve all safety-committee decisions. Issues not resolved by majority vote will be forwarded to management for resolution.

5. EMPLOYEE INVOLVEMENT

The safety committee will encourage employees to identify health and safety hazards in the workplace. Concerns raised by employees will be presented to the committee in writing; the committee will review new concerns at the next regularly scheduled monthly meeting. T

6. SAFETY LOG

The committee will maintain a log of all employee safety concerns, including the date received, root cause analysis, criticality value, committee's recommendation, point of contact to resolve the concern and the estimated completion date.

7. RESPONSE

The committee will respond to employee concerns in writing and work with management to resolve them. The committee will present written recommendations for resolving concerns to management. Within 60 days of receiving the written recommendations, management will respond in writing to the committee indicating acceptance, rejection, or modification of the recommendations.

8. INCIDENT AND ACCIDENT INVESTIGATION

The safety committee will review new safety- or health-related incidents at its next regularly scheduled meeting. Safety-related incidents include work-related near misses, injuries, illnesses, and deaths. When necessary, the committee will provide written recommendations to management for eliminating or controlling hazards.

9. WORKPLACE INSPECTIONS



The safety committee will conduct quarterly workplace inspections of all company facilities in Basin Transit Service District Office and Equipment Shop and Southside Transfer Station. All inspections and findings will be recorded on the BTS Safety Inspection Worksheet.

10. WRITTEN REPORT

The committee will prepare a written report for management that documents the location of all health or safety hazards found during inspection. The report will recommend options for eliminating or controlling the hazards. Within 60 days of receiving the written report, management will respond in writing to the committee, indicating acceptance, rejection, or proposed modification of the recommendations.

11. EVALUATION

The safety committee will evaluate Basin Transit Service workplace safety and health program annually and provide a written evaluation of the program to management. The committee will also evaluate its own activities each August and use the evaluation to develop an action plan for the next calendar year.

Chair Signature Date

Vice Chair Signature Date



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EXHIBIT B: See Training

Exhibit C: See Appointment Letter



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EXHIBIT A: Safety Committee Bylaws

BASIN TRANSIT PROGRAM

14 JANUARY 2026

Safety Committee Bylaws

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Chair Signature Date

Vice Chair Signature Date

Basin Transit Service

14 JAN 2026

Emergency Action Plan (EAP)

In accordance with OAR 437-002-0042(6)(B)

1. Purpose

The purpose of this Emergency Action Plan (EAP) is to ensure the safety of employees, passengers, and visitors of Basin Transit Service during emergency situations. This plan establishes procedures for emergency evacuation, reporting emergencies, accounting for personnel, and coordination with emergency responders, as required by OAR 437-002-0042(6)(B).

2. Scope

This plan applies to all Basin Transit Service employees, contractors, volunteers, and visitors at:

- Administrative offices
 - Maintenance facilities
 - Transit centers
 - Passenger vehicles (buses, vans, support vehicles)
-

3. Emergency Reporting Procedures

Emergencies may include fire, explosion, medical emergencies, severe weather, hazardous materials incidents, active threats, earthquakes, or utility failures.

To report an emergency:

1. Call **911** immediately if there is a threat to life or property.
2. Notify the **Dispatcher or Supervisor on Duty** as soon as it is safe to do so.
3. Use two-way radios, phones, or alarm systems as available.

Emergency contact information shall be posted at all facilities and inside vehicles.

4. Evacuation Procedures and Routes

- Evacuation maps showing **primary and secondary exit routes** are posted at each facility.
 - Employees shall evacuate immediately upon hearing an alarm or being instructed to do so by a supervisor.
 - Transit operators shall:
 - Stop the vehicle in a safe location
 - Shut down the engine (if time permits)
 - Assist passengers in evacuating to a safe distance
-

5. Procedures for Employees Who Remain to Operate Critical Operations

(OSHA 29 CFR 1910.38(c)(3) & (c)(4))

In accordance with OSHA 29 CFR 1910.38, certain designated employees may be required to remain in the workplace for a limited time to perform critical operations prior to evacuation. These operations are intended to minimize hazards, prevent escalation of the emergency, and assist emergency response efforts, and shall be performed only when it is safe to do so.

Only employees who are specifically designated, authorized, and trained to perform these functions may remain on-site. No employee shall be required to perform critical operations that would expose them to imminent danger.

Designated Critical Operations and Responsibilities

General Manager

- Serves as the designated management authority responsible for overall emergency coordination until relieved by emergency responders.
- Authorizes suspension of operations and facility evacuation as required.
- Coordinates with external emergency response agencies and regulatory authorities, as necessary.

Operations Manager

- Directs the orderly shutdown of transit operations in accordance with established procedures.
- Ensures employees under their supervision are evacuated or accounted for.
- Communicates operational status and hazards to the General Manager and emergency responders.

Dispatcher

- Maintains emergency communication with operators, supervisors, and emergency responders during the incident.
- Issues evacuation instructions and emergency notifications as directed.
- Secures dispatch and communication systems once critical communication functions are completed.

Field Supervisors

- Assist in the evacuation of employees, contractors, and visitors from affected areas.
- Secure vehicles and field operations when feasible and safe to do so.
- Provide situational and accountability reports to management and emergency responders.

Lead Mechanic

- Shuts down fuel systems, electrical systems, and other hazardous energy sources in accordance with training and written procedures.
- Secures maintenance facilities, equipment, and hazardous materials when practicable.
- Provides technical information regarding facility systems to emergency responders upon request.

Upon completion of assigned critical operations—or when continued presence would present a safety risk—designated employees must evacuate the workplace immediately and proceed to the designated assembly area.

This procedure complies with OSHA 29 CFR 1910.38 requirements for:

- Designation of employees to perform critical operations prior to evacuation
- Employee protection during emergency conditions
- Prompt evacuation following completion of critical tasks

Training and Designation of Employees Performing Critical Operations

(OSHA 29 CFR 1910.38(f))

Employees assigned to perform critical operations during an emergency shall be formally designated in writing by management. Designation shall be based on job responsibilities, training, and demonstrated competency. A current list of designated employees shall be maintained and reviewed annually.

All designated employees shall receive initial and refresher training that includes, at a minimum:

- Emergency action plan procedures and evacuation requirements
- Specific critical operation tasks they are authorized to perform
- Recognition of hazards associated with emergency conditions
- Procedures for communicating with supervisors and emergency responders
- Conditions under which operations must be discontinued and evacuation initiated

Training shall be provided:

- Upon initial assignment to a critical operations role
- When an employee's responsibilities change
- When the Emergency Action Plan is revised
- At least annually, or as otherwise required to ensure continued competency

No employee shall be permitted to perform critical operations unless they have received appropriate training and have been formally designated. Employees are instructed that personal safety takes precedence over property protection, and they are required to evacuate immediately if conditions become unsafe.

6. Accounting for Employees and Passengers

- Supervisors or designated personnel will account for employees at designated **assembly areas**.
 - Transit operators will report passenger status to dispatch as soon as practical.
 - Missing or injured individuals will be reported immediately to emergency responders.
-

7. Rescue and Medical Duties

- Employees are **not required** to perform rescue operations unless trained and authorized.
 - First aid or CPR may only be provided by employees with current certification.
 - Emergency medical services (EMS) will be contacted for all serious injuries or medical emergencies.
-

8. Emergency Coordinators

Basin Transit Service designates the following roles:

- **Emergency Coordinator:** General Manager or designee
- **Alternate Coordinator:** Operations Manager or Maintenance Supervisor

Responsibilities include:

- Coordinating evacuation
- Communicating with emergency responders
- Determining when it is safe to re-enter facilities

Names and contact information shall be maintained and updated annually.

9. Training and Communication

- All employees receive EAP training:
 - At initial hire
 - When job duties change
 - When the plan is updated
- Training includes:
 - Emergency reporting
 - Evacuation routes
 - Passenger assistance procedures
- This plan is available:
 - In written form at facilities
 - Electronically for employee access

10. Plan Review and Maintenance

- This Emergency Action Plan will be reviewed:
 - At least **annually**
 - After any major emergency
 - When facility layouts or operations change
- Updates will be communicated to all employees.

11. Compliance Statement

This Emergency Action Plan is established in compliance with **OAR 437-002-0042(6)(B)** and applicable Oregon OSHA requirements. Basin Transit Service is committed to maintaining a safe and prepared workplace.

Emergency Action Plan – Bus Operations Addendum

Klamath Falls, Oregon

1. Purpose

This addendum provides bus-specific emergency procedures for on-route incidents, including vehicle fires, traffic collisions, highway evacuations, severe weather, and rail crossings, to protect employees and passengers operating within **Klamath Falls and surrounding Klamath County service areas**.

2. On-Route Bus Fire Procedures

Indicators of Fire

- Smoke, burning smell, sparks, warning lights
- Passenger reports of smoke or flames

Operator Actions

1. **Stop immediately** in the safest possible location:
 - Prefer wide shoulders, parking lots, or side streets
 - Avoid stopping near buildings, dry grass, or rail crossings
2. **Secure the vehicle:**
 - Set parking brake
 - Shut off engine and electrical systems
3. **Evacuate passengers immediately:**
 - Use front and rear exits
 - If exits are blocked, use emergency windows or roof hatches
4. **Move passengers at least 150 feet upwind**
(Critical during wildfire season and dry summer months in Klamath Falls)
5. **Call 911** and notify Dispatch with:
 - Route number
 - Location (cross streets or mile markers)
 - Fire status and passenger count

Fire Extinguisher Use

- Only if:
 - Fire is small
 - Operator is trained
 - Evacuation is complete
 - Operators must **never delay evacuation** to fight a fire.
-

3. Traffic Collisions (Urban and Highway)

Immediate Actions

1. Stop vehicle and set parking brake.
2. Turn on hazard lights.
3. Check for injuries.
4. Call **911** if:
 - Injuries are present
 - Vehicles are disabled
 - Collision occurs on highways (e.g., Hwy 97, Hwy 39, Hwy 140)
5. Notify Dispatch immediately by radio, or cell phone only if radio communication cannot be safely accomplished.

Passenger Management

- Keep passengers on the bus **unless**:
 - There is a fire risk
 - The bus is in an unsafe position (traffic lane, curve, shoulder with limited visibility)
- If evacuation is required:
 - Move passengers **off the roadway**
 - Use roadside barriers, embankments, or open areas away from traffic

Documentation

- Operators must complete required incident reports as soon as practicable.
-

4. Highway & Rural Road Evacuations

Klamath Falls routes may include **high-speed highways, rural roads, and limited-shoulder areas.**

Evacuation Guidelines

- Avoid evacuating onto:
 - Active traffic lanes
 - Narrow shoulders
 - Bridges or overpasses
- If evacuation is unavoidable:
 - Position bus to shield passengers from traffic
 - Use emergency triangles if safe to deploy
 - Move passengers behind guardrails or well off the roadway

Weather Considerations

- Winter: ice, snow, reduced visibility
- Summer: smoke, heat exposure, wildfire proximity

Operators should prioritize **passenger shelter and distance from traffic**.

5. Severe Weather & Wildfire Smoke

Smoke / Air Quality Events

- Close doors and windows when smoke is present
- Notify Dispatch if visibility or passenger health is affected
- Be alert for:
 - Breathing difficulties
 - Disorientation or panic

Snow and Ice

- Reduce speed and increase following distance
 - Stop service if conditions become unsafe and await Dispatch instructions
 - Do not attempt steep grades during icy conditions unless cleared
-

6. Rail Crossing Emergencies

Klamath Falls contains **active rail crossings**.

If a Bus is Disabled on Tracks

1. **Evacuate immediately:**
 - Move passengers **away from tracks at a 45-degree angle towards the direction of the upcoming train to decrease chances of injury by debris**
 2. Call **911** immediately.
 3. Notify Dispatch.
 4. Do **not** attempt to restart or move the bus once evacuation begins.
-

7. Medical Emergencies On-Board

Operator Responsibilities

- Stop in a safe location.
 - Call **911** and notify Dispatch immediately by radio, or cell phone only if radio communication cannot be safely accomplished.
 - Do not administer medical care unless trained.
 - Keep passengers calm and clear space for EMS.
-

8. Accounting for Passengers

- Operators must report:
 - Number of passengers evacuated
 - Any injuries or missing persons
 - Dispatch will assist with replacement vehicles or shelter coordination.
-

9. Coordination with Local Emergency Services

Basin Transit Service coordinates with:

- **911**
- **Klamath County Emergency Management**

Only when applicable and hen not coordinated by 911:

- **Klamath County Fire Districts**
- **Klamath Falls Police Department**
- **Oregon State Police**
- **ODOT** (for highway incidents)

Operators shall follow instructions from emergency responders at all times.

10. Training Requirements

Operators receive training on:

- Bus fire evacuation
- Emergency exits
- Highway evacuation safety
- Passenger management during emergencies
- Local hazard awareness (weather, smoke, wildlife)

Training occurs:

- At hire
 - Annually
 - After any major incident
-

11. Compliance Statement

This addendum supplements the Basin Transit Service Emergency Action Plan and complies with **OAR 437-002-0042(6)(B)** by addressing emergency reporting, evacuation, accountability, and coordination for transit vehicle operations in **Klamath Falls, Oregon**.

3) Crosswalk: BTS Klamath Falls bus scenarios → FTA + ODOT guidance

A. On-route bus fire (engine bay, interior smoke, electrical)

BTS procedure element	FTA mapping (PTASP/SMS)	ODOT mapping
Stop safely, shut down, immediate evacuation, move upwind/150 ft	SRM hazard → risk assessment → mitigation; Policy for operator authority and reporting	“Operate in a safe manner,” safety practices/programs; documentation if it rises to reportable incident
Extinguisher use only after evacuation + only if trained	Safety Promotion training + competency requirements	Safety program + regular safety training expectation

Add to your ASP/SMS files: treat “bus fire” as a defined **hazard category** with standard mitigations and training refreshers (SMS documentation).

B. Collision (urban streets + Hwy 97 / 39 / 140 conditions)

BTS procedure element	FTA mapping (PTASP/SMS)	ODOT mapping
Secure scene, passenger protect-in-place vs evacuate, call 911 + dispatch	Safety Management Policy (roles/reporting) + Assurance investigation of safety events	Accident reporting criteria + follow-up documentation expectations
Passenger accountability + reporting passenger count/status	Assurance monitoring + investigation & corrective actions	Reportable accident thresholds (injury transport, tow/totaled, DMV report, etc.)

Operational compliance tip: build a simple internal rule: “If tow, injury transport, fatality, or DMV report → treat as **ODOT reportable** and trigger your internal checklist.”

C. Evacuation on highways / rural roads (limited shoulder, high speed traffic)

BTS procedure element	FTA mapping (PTASP/SMS)	ODOT mapping
Avoid evacuating into lanes; use bus as shield when appropriate; move behind guardrails	SRM mitigations for “highway egress/evacuation” hazard; Safety communication to operators	Safety practices/programs during site reviews; safe operation expectation
Winter ice/snow, summer smoke/heat adaptations	Hazard identification sources include oversight and relevant public safety info; mitigations monitored under Assurance	Supports the SMP “safe operation” standard; document training and procedures

4) Emergency response operations and eligible funding (ODOT + FTA Emergency Relief context)

ODOT’s “Transit Resources to Assist in Emergency Response” explicitly supports using transit assets for emergency response and discusses STF/STIF flexibility (including **Program Reserve** for unanticipated/emergency needs) and alignment with FTA emergency relief concepts. It also calls out the importance of **tracking service details and protective measures** during emergency operations (vehicles used, trips, passengers, hours, damages, repairs).

That ties to your Klamath Falls-specific procedures when BTS buses are used for:

- evacuations/shelter transport,
- detours around impacted areas,
- emergency “extra trips” during incidents.

BASIN TRANSIT SERVICE

OPERATOR EMERGENCY QUICK CARD

Klamath Falls, Oregon

FIRST PRIORITY — LIFE SAFETY

1. **STOP** in the safest location possible
 2. **SECURE** the bus (parking brake, engine off if safe)
 3. **PROTECT & EVACUATE** passengers if needed
 4. **CALL 911** when life, fire, or traffic hazards exist
 5. **NOTIFY DISPATCH** as soon as possible
-

BUS FIRE (Smoke, Flames, Burning Smell)

- Stop immediately (away from dry grass, buildings, traffic)
 - Shut off engine
 - **Evacuate ALL passengers immediately**
 - Use all available exits
 - Move passengers **150 feet UPWIND**
 - Call **911** → then Dispatch
 - Fire extinguisher: **only if trained & fire is small**
 - **Do NOT delay evacuation**
-

COLLISION / ACCIDENT

- Stop, set brake, hazard lights ON
- Check for injuries
- Call **911** if injuries, disabled vehicles, or on highways
(*Hwy 97 / 39 / 140*)
- Notify Dispatch
- Keep passengers on bus **unless unsafe**
- If evacuating:
 - Move passengers **off roadway**
 - Behind guardrails or far from traffic



HIGHWAY / RURAL ROAD EVACUATION

- Avoid evacuating onto:
 - Traffic lanes
 - Narrow shoulders
 - Bridges or curves
- If evacuation is required:
 - Position bus to shield passengers
 - Move passengers well away from traffic
- Use emergency triangles **only if safe**



DISABLED ON RAILROAD TRACKS

- **EVACUATE IMMEDIATELY**
- Move passengers **45° away from tracks**
- Call **911** immediately
- Notify Dispatch immediately by radio, or cell phone only if radio communication cannot be safely accomplished.
- Do NOT attempt to move the bus once evacuation starts



MEDICAL EMERGENCY

- Stop in safe location
- Call **911**
- Notify Dispatch immediately by radio, or cell phone only if radio communication cannot be safely accomplished.
- Do NOT provide medical care unless trained
- Clear space for EMS
- Keep passengers calm



WEATHER / WILDFIRE SMOKE

- Reduce speed in snow/ice
- Stop service if conditions become unsafe
- Close doors/windows in heavy smoke

- Watch for passenger breathing distress
 - Await Dispatch instructions if routes are impacted
-

PASSENGER ACCOUNTABILITY

- Know how many passengers were onboard
 - Report injuries or missing persons to Dispatch/EMS
 - Stay with passengers until relieved by responders
-

EMERGENCY CONTACTS

- **911** – Life-threatening emergencies
 - **Dispatch** – ASAP after 911 or when safe
-

REMEMBER

- **Your job is NOT to rescue — it is to protect and evacuate**
- Follow instructions from police, fire, EMS, and Dispatch
- When in doubt: **STOP, EVACUATE, CALL 911**



APPROVAL

Resolution 2026-01 in the matter of declaring certain properties as Surplus Property

Vehicle/Equipment Description	Asset No.	Make	Model	Year	Age	Miles/Hours	Useful Life Minimum Meet	Fuel Type	Plate No.	VIN/Serial No.	Estimated Vehicle/Equipment Fair Market Value
Bus - CATA	2005	Gillig	Low Floor	2001	25	645,856	Yes	Diesel	E216696	15GGB221511071810	\$8995 to \$15,000
Bus - CATD	819	Ford	E450	2009	17	236,413	Yes	Gasoline	E285718	1FDFE45SX9DA20710	\$2,274 to \$3,695

BEFORE THE BOARD OF DIRECTORS
OF
BASIN TRANSIT SERVICE
TRANSPORTATION DISTRICT

IN THE MATTER OF DECLARING) RESOLUTION AND ORDER
CERTAIN PROPERTIES AS SURPLUS) NO. 2026-01
AND AUTHORIZING DISPOSAL)

WHEREAS, this matter came before the Board at it's meeting of April 1, 2026, and

WHEREAS, District policy 12.5 requires that all property, real or personal, without current or future anticipated use within the District shall be declared surplus by the Board at a regularly scheduled meeting, and

NOW AND THEREFORE, the Board of Directors of Basin Transit Service Transportation District of Klamath County, Oregon, RESOLVES AS FOLLOWS:

That the materials and equipment in the attached listing is declared surplus and shall be disposed of in accordance with District Policy 12.5.

DATED this 1st of April, 2026

BOARD OF DIRECTORS, BASIN TRANSIT
SERVICE TRANSPORTATION DISTRICT

ERIK NOBEL, CHAIRPERSON

CRYSTAL ENTRIKEN , RECORDING SECRETARY

Basin Transit Service Transportatic Surplus Property For

Vehicle/Equipment Description	Asset No.	Make	Model	Year	Age	Miles/Hours	Useful Life Minimum Meet
Bus - CAT A	2005	Gillig	Low Floor	2001	25	645,856	Yes
Bus - CAT D	819	Ford	E450	2009	17	236,413	Yes

Note: Miles are as of March 3, 2026

The General Manager by their signature has approved the vehicle(s) and equipment list above as surplus property and that procedure and Procedures Manual.

Approved by General Manager: _____

Date: _____

on District 2026

Fuel Type	Plate No.	VIN/Serial No.	Estimated Vehicle/Equipment Fair Market Value
Diesel	E216696	15GGB221511071810	\$8995 to \$15,000
Gasoline	E285718	1FDFE45SX9DA20710	\$2,274 to \$3,695

roperty shall be disposed of in accordance to Basin Transit Service Transportation District Policy

_____ Adrian Mateos



APPROVAL

***Resolution 2026-02 Donation of Surplus Property to
Coast to Coast Academy – passenger vehicle***

BEFORE THE BOARD OF DIRECTORS
OF
BASIN TRANSIT SERVICE TRANSPORTATION DISTRICT

IN THE MATTER OF APPROVING DONATION)	RESOLUTION AND ORDER
OF 2009 FORD E450)	NO. <u>2026-02</u>
TO KLAMATH COMMUNITY COLLEGE)	

WHEREAS this matter came before the Board at its meeting of April 1, 2026, and

WHEREAS 2009 FORD E450 VIN 1FDFE45SX9DA20710 has been declared surplus property by the General Manager, and

WHEREAS, Basin Transit Service Transportation District Policies and Personnel Procedures Manual, Part Two-State of Oregon Procurement Requirements, Section J (1)(a) Surplus Property, Donation, Page 36, allows for the donation of surplus property to public agencies without competition upon approval by the Board of Directors, and

WHEREAS Coast to Coast Academy is a recognized non-profit organization dedicated to serving low-income youth and is in need of a vehicle to support transportation for athletic programs that would otherwise be beyond their households' financial means; and

WHEREAS in 2024, Coast to Coast Academy received one vehicle from Basin Transit Service, which has significantly enhanced its ability to expand youth sports programming and increase access for underserved populations; and

WHEREAS Coast to Coast Academy is also coordinating with Discover Klamath to bring a large-scale soccer tournament to Klamath Falls in 2027, projected to generate an estimated \$1.3 million economic impact for Klamath County; and

WHEREAS efforts to coordinate with other entities for the transfer of this vehicle have not been successful, as organizations including Klamath Community College and Clackamas Behavioral Health have declined the potential donation; and

WHEREAS the addition of another vehicle will further support this mission by enabling continued program growth, including the planned launch of a women's team, thereby broadening opportunities for participation and equity in athletics;

WHEREAS the General Manager of Basin Transit Service Transportation District recommends to the Board of Directors the donation of the 2009 FORD E450 VIN 1FDFE45SX9DA20710 to Coast to Coast Academy for transportation of low income athletes, and

NOW AND THEREFORE, the Board of Directors of Basin Transit Service Transportation District of Klamath County, Oregon, RESOLVES AS FOLLOWS:

That 2009 FORD E450 VIN 1FDFE45SX9DA20710 is to be donated to to Coast to Coast Academy for transportation of low income athletes, 7390 S 6th St, Klamath Falls, OR 97603 for transportation activities for students.

DATED this 1st day of April 2026

BOARD OF DIRECTORS, BASIN TRANSIT
SERVICE TRANSPORTATION DISTRICT

Erik Nobel, CHAIRPERSON

Crystal Entriken, RECORDING SECRETARY



APPROVAL

***Resolution 2026-03 Donation of Surplus Property to
Klamath County Museum - Trolley***

BEFORE THE BOARD OF DIRECTORS
OF
BASIN TRANSIT SERVICE TRANSPORTATION DISTRICT

IN THE MATTER OF APPROVING DONATION)	RESOLUTION AND ORDER
OF 1996 CHANCE TROLLEY)	NO. <u>2026-03</u>
TO KLAMATH COUNTY MUSEUM)	

WHEREAS this matter came before the Board at its meeting of April 1, 2026, and

WHEREAS 1996 CHANCE TROLLEY VIN 1C9S2HAS2TE535036 has been declared surplus property by the General Manager, and

WHEREAS, Basin Transit Service Transportation District Policies and Personnel Procedures Manual, Part Two-State of Oregon Procurement Requirements, Section J (1)(a) Surplus Property, Donation, Page 36, allows for the donation of surplus property to public agencies without competition upon approval by the Board of Directors, and

WHEREAS Klamath County Museum is a historical resource for the community, while deepening partnerships with other historical entities and expanding collaboration with local Tribal Communities. Dedicated to fostering a cultural heritage for the community through education and historical outreach programming, and

WHEREAS the General Manager of Basin Transit Service Transportation District recommends to the Board of Directors the donation of the 1996 CHANCE TROLLEY VIN 1C9S2HAS2TE535036 to Klamath County Museum advance educational, cultural, and historical preservation efforts, and

NOW AND THEREFORE, the Board of Directors of Basin Transit Service Transportation District of Klamath County, Oregon, RESOLVES AS FOLLOWS:

That 1996 CHANCE TROLLEY VIN 1C9S2HAS2TE535036 is to be donated to Klamath County Museum, 1451 Main St, Klamath Falls, OR 97601 for advance educational, cultural, and historical preservation efforts.

DATED this 1st day of April 2026

BOARD OF DIRECTORS, BASIN TRANSIT
SERVICE TRANSPORTATION DISTRICT

Erik Nobel, CHAIRPERSON

Crystal Entriken, RECORDING SECRETARY



APPROVAL

***Board approval for the General Manager to attend the
OTA Strategic Meeting***

OTA Board & Legislative Retreat Draft Agenda

Monday, April 6

6:00 Dinner – Tie Breaker (194-US 101, Rockaway Beach)

Hotel – Rockaway Beach Resort & Conference Center: Call 503-355-2191 or book online at www.ezrbr.com and reference OTA.

Tuesday, April 7 – Rockaway Beach Resort & Conference Center (615 N Pacific St)

8:00 Hosted Breakfast

9:00 Welcome & Introductions

9:50 Break

10:00 Legislative Session Recap and Strategy Discussion with Government Affairs Team

- Interim Outreach Strategy
- Transit Moves Oregon/WA Transit is Why websites
- What OTA Members need to be better prepared in 2027
- Data/information/stories needed
- Allies/Advocates/Coalition Building

10:50 Break

11:00 Legislative Strategy Discussion Continued

12:00 Hosted Lunch

1:00 Board/Organization Strategic Planning

- Bylaws
- Board Seat Structure – Elected and Appointed Designations
- Public Communications Strategy/Media Requests/Social Media

1:50 Break

2:00 Board/Organization Strategic Planning Continued

2:50 Break

3:00 Conference/Training/Education

- ODOT Required Trainings/Grants
- Future Dates

4:00 Adjourn



APPROVAL

***Board approval to reschedule the Board of Directors
meeting from April 22nd to April 29th 2026***



NEW BUSINESS



BOARD OF DIRECTORS MEETING
March 2026