



To: Oregon Department of Transportation

From: Alta Planning + Design

Date: June 30, 2025

Re: ODOT Regional Shared Micromobility Study - Executive Summary

Introduction

Study Purpose and Background

The purpose of the Oregon Department of Transportation (ODOT) Regional Shared Micromobility Study has been to explore the viability of various regional shared micromobility (SMM) systems across the state. This was driven by an interest in studying how a state-level agency can support and facilitate local interest in shared micromobility, which to date has largely been focused on larger, higher-density markets.

Supporting the development of successful regional shared micromobility programs across the state will help ODOT achieve several of the strategic outcomes identified in the agency's 2024-2028 Strategic Action Plan (**Table 1**). The executive summary provides background information on the study, describes the preferred model for a regional shared micromobility program, and outlines the next steps to develop a regional partnership.

Table 1. ODOT Strategic Outcomes and the role of SMM services

Strategic Outcome	Role of Regional Shared Micromobility
Improve Equitable Outcomes	Along with thoughtful equipment and/or station placement, SMM services can increase access to bikes, scooters, or other devices in high equity index neighborhoods and improve transportation outcomes.
Reduce Emissions and Electrify Oregon's Transportation System	SMM programs can reduce emissions through the conversion of vehicle trips to active transportation trips.
Improve Access to Active and Public Transportation	SMM programs can improve active and public transportation access by providing convenient and affordable opportunities for bicycling and/or scooter trips while also acting as a first/last mile solution for transit access.

Innovative Mobility Program

The work of this study dovetails with the goals and activities of the Innovative Mobility Program (IMP), a pilot program currently administered by ODOT. IMP is designed to "increase social equity and mobility while reducing the effects of climate change". The program is funded by the Bipartisan Infrastructure Law passed in 2021 with some funding also provided by the State of Oregon, totaling \$20 million for grants and contracts. IMP offers competitive and non-competitive grants to support pilot programs, studies, equipment, and service expansions of new or emerging transportation options. While IMP is a pilot program and not an ongoing or sustainable source of funding,

some local or regional SMM programs may benefit from IMP funding. This study helps to clarify the role of ODOT in SMM systems in Oregon now and in the future.

Study Participants

More than a dozen local and regional agencies were involved in the study, participating either as core study area partners or stakeholders. Core study area partners included regional population centers and agencies who were especially interested in implementing regional SMM systems in their jurisdictions, while the additional stakeholders involved were those who expressed some interest in regional SMM systems but may be further away from any potential implementation.

<i>Core Study Partners</i>	<i>Stakeholders Involved</i>
• City of Ashland • Cherriots (Salem Area Mass Transit District) • City of Corvallis • City of Medford • City of Eugene • City of Portland	• City of Beaverton • City of Gresham • City of Springfield • City of Milwaukie • Lane Transit District • Rogue Valley Transportation District • TriMet • Oregon Cascades West Council of Governments

Process

Alta led the study which began in fall 2024 and wrapped up in spring 2025. The study consisted of interviews and in-person workshops to learn from core study partners, stakeholders and shared micromobility operators. The team also conducted research and data analysis. The study consisted of three stages:

1. **Regional Convening:** Meet with study participants to understand the current state of interest and readiness for a regional shared micromobility system and gather insights from shared micromobility operators.
2. **Identifying and Evaluating Options:** Research and summarize regional program models and document characteristics of jurisdictions.
3. **Identifying Next Steps:** Develop a preferred model based on findings from previous steps and determine the next steps to stand up the new approach.

Findings from the study were compiled into four memos, which are summarized in Table 2 below.

Table 2. Technical memo summaries and links

Memo Number	Steps Involved and Key Findings
Technical Memo #1: Interviews with Agencies, Stakeholders and Vendors	Information Gathering: For the initial information gathering stage, Alta staff engaged in conversations with the six core study area partners and conducted interviews with eight stakeholder municipalities and agencies. Each of the six core study area partners was found to have had experience with SMM systems – programs were generally popular in each community, but many are no longer active due to funding or staff capacity limitations. Workshop #1: Alta brought together the six core study area partners and stakeholders to collaborate on a vision and goals for a regional shared micromobility program. Vendor Insights: Three micromobility vendors were interviewed to understand their perspective of and experience with regional shared programs.
Technical Memo #2: Existing Conditions	Participating Municipality Characteristics: Alta shared findings on their analyses of equity, SMM demand, bike network, funding availability, and staff capacity of all six core study area partners. All six communities were found to have areas of high demand within their cities, but funding availability and staff capacity are limited. Existing Regional Models: Programs from San Francisco, Boston, Washington DC, Los Angeles, and the Pioneer Valley (Massachusetts) were evaluated to understand various types of existing regional shared micromobility structures.
Technical Memo #3: Potential Regional Models	Identification of Potential Models: Information gathered from partner, stakeholder, and vendor interviews and the evaluation of existing regional models was used to identify three potential models for regional shared micromobility in Oregon. Workshop #2: Alta convened the core study partners and stakeholders to discuss and stress-test the three potential models and evaluate each as a group. The Decentralized Cooperative Regional model scored the highest and was selected as the preferred option.
Technical Memo #4: Preferred Model Approach	Description of Preferred Model: Alta provided a more detailed description of the Decentralized Cooperative model including roles and responsibilities of involved parties. Applying the Decentralized Cooperative Model: The memo also discussed the initial steps that jurisdictions would need to take to prepare, the procurement pathway for both new systems and existing systems, and the next steps to move toward a regional system.

Definitions

Shared Micromobility: Fleets of micromobility devices (typically bikes and/or scooters) that are available to the public for shared use.¹ Devices may be human powered, electric powered, or a combination of the two and typically travel at relatively low speeds.

Regional Shared Micromobility: Fleets of shared micromobility devices which are available across jurisdictional boundaries in a particular region and are provided by a single operator.

¹ From Transportation for America's "[Shared Micromobility Playbook](#)"

Lead Agency: A municipal, regional, or non-governmental agency designated to manage a region's program. This could be a transit agency, metropolitan planning organization, council of governments, or other organization with the capacity to administer a program for the region. This designation can rotate on a routine basis such as every procurement cycle.

Operator: A for-profit or nonprofit organization responsible for shared micromobility operations, which can include rebalancing, charging, and repairing vehicles.

Participating Agency: Any municipal, regional, or other agency participating in the regional shared micromobility system.

Region: An area consisting of two or more municipalities, which may or may not be geographically contiguous, collaborating on a shared micromobility program.

Regional Coordinator: A staff position housed in a regional public agency to handle program administration for a region. Through this study, it became clear that there is not enough capacity at participating agencies. ODOT may be best suited to provide funding for this position.

Purpose of Executive Summary

The implementation of a regional system, as determined by this study, would require collaboration between various partners. This executive summary will provide an overview of the preferred model while highlighting what it means for ODOT, local jurisdictions interested in participating in a regional system, and regional agencies interested in supporting a system.

A Regional Model for Shared Micromobility in Oregon

Preferred Model: Decentralized Cooperative Regional Micromobility Model

A major outcome of the study was the determination of a preferred model for a regional system. After many discussions with participating agencies, stakeholders, and operators, the project team concluded that a **Decentralized Cooperative regional system** is the preferred model for shared micromobility. The model is designed to benefit regions that work together and select a single operator, while also recognizing that existing programs (such as Eugene and Portland, in particular) will have the option to continue with an existing operator and still have opportunities to benefit from ODOT support.

This approach to shared micromobility across Oregon:

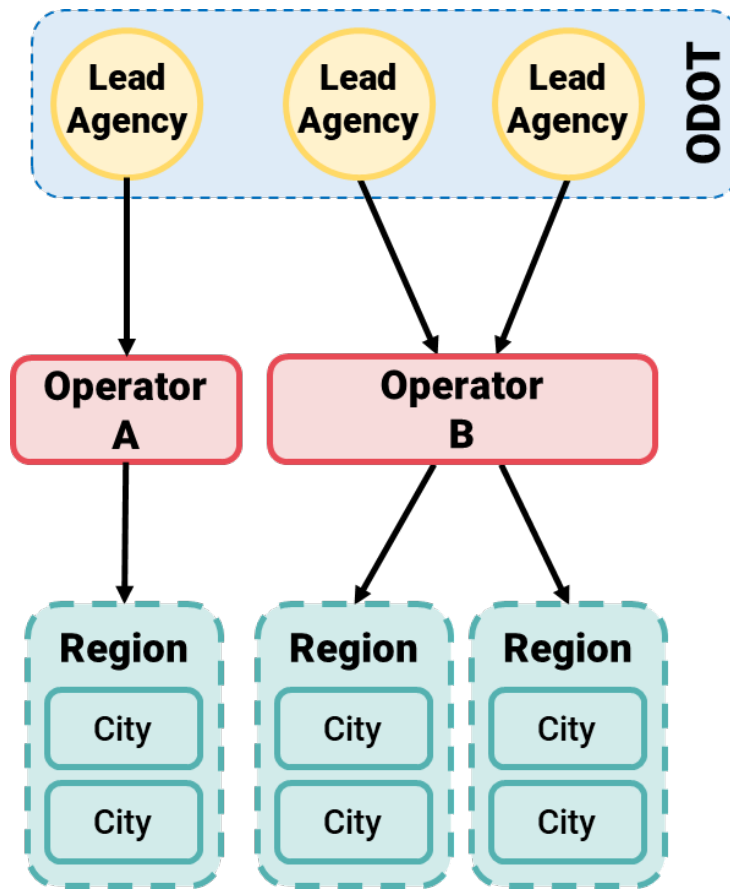
- Reduces duplication of effort on behalf of municipalities and regional agencies in developing independent programs
- Offers options to augment staff capacity for smaller municipalities who desire a shared micromobility program but do not have resources to dedicate currently

- Provides an option for smaller communities to participate in a system large enough to attract shared micromobility operators
- Offers the ability to collaborate and take advantage of economies of scale while retaining some local control of the program

The Decentralized Cooperative Regional Model strikes a balance between a highly centralized approach, which would struggle to accommodate the flexibility needed to address localized needs, and a highly individualized approach, which would lose out on shared benefits of scale.

Figure 1 shows an example scenario within the Decentralized Cooperative Regional Model where more than one operator is providing shared micromobility services in Oregon. In this model, ODOT will largely be in a supportive role, acting as a facilitator and information provider while local and regional agencies manage system implementation. Specifically, ODOT will share information with and identify participating cities and other local agencies who would then determine a lead agency for their region. Once cities are identified and lead agencies are selected, ODOT would convene lead agencies to facilitate peer-to-peer information sharing, potentially developing templates for policies or processes that may function similarly across all regions. Cities and lead agencies would lead the system roll-out by developing a cooperative RFP and negotiating the contract with the selected operator.

Figure 1: Illustrative Example of the Decentralized Cooperative Regional Micromobility Model



Applying the Decentralized Cooperative Model

As shown in **Table 3**, this model establishes a regional approach to micromobility across multiple markets. This approach is largely based on the existing Capital Bikeshare model in the Washington, DC area. For instance, in the Capital Bikeshare model, all “member jurisdictions” worked together on a collaborative RFP in which Arlington County took the lead on issuing. Each member jurisdiction established their own contract with the operator (Lyft). They meet regularly to discuss issues affecting the system. In a similar fashion, each region would be in a similar role to each member jurisdiction and may designate its own lead agency to manage the contract with the operator. Each lead agency coordinates activities and operational decisions within its region. ODOT can provide support to the system by working with regional lead agencies to select a single operator during the procurement process and purchase equipment. **Additional information on the Decentralized Regional Cooperative model and the other two options considered are covered in Technical Memo #3.**

Table 3. Elements of a Decentralized Cooperative Regional Micromobility Model

Element	Description
Existing Example	Capital Bikeshare (Washington, DC Area)
Markets	Portland Metro Area Salem Corvallis Medford/Ashland Eugene/Springfield
Governance	A regional approach to governance where each region coordinates activities and makes decisions regarding operations within their region. Each region may designate its own lead agency and program administrator to manage the contract with the operator.
Procurement	A collective process where jurisdictions release a collaborative RFP to select an operator. Each jurisdiction has their own contract with the operator.
Equipment Ownership	Public ownership
Program Administrator	Regional public or transit agencies
Operator	Regional non-profit or for-profit operator
Funded By	ODOT Cities Universities Regional agencies Transit agencies Sponsors

Roles and Responsibilities

Table 4 describes the roles and responsibilities that ODOT, lead agencies, and cities would take on in this model.

Table 4. Roles and Responsibilities in the Decentralized Cooperative Model

Agency	Roles and Responsibilities
ODOT	• Administer funding through applicable programs to support regional shared micromobility system development. • Convene parties interested in collaborating on a regional shared micromobility system. • Support participating agencies with the procurement of shared micromobility equipment, operator, and data aggregator.
Lead Agency	• Collaborate with participating agencies to develop mutually agreed-upon operating guidelines/principles and build scope of services for operator. • Work in partnership with other participating agencies on collaborative solicitation for shared micromobility operator, equipment, and other goods and services needed for shared micromobility system. • Participate in regular meetings between other participating agencies to come to collective decisions affecting the whole system. • Manage operator contracts and serve as a point of contact for the operator. • Act as an interface between the operator and participating agencies if any operating issues arise. Work with the operator to resolve issues. • Support limited public engagement related to the core function of program such as attending public meetings at the behest of jurisdictions, drafting press releases, and managing press inquiries. • Support siting of parking hubs (if applicable) and work with participating agencies on planning and implementing supportive infrastructure.
Participating Agencies (Municipality or Regional Agency)	• Assist lead agency with coordination with other city departments and officials. • Act as a liaison between the public and lead agency to communicate issues as they arise.

Partners in Program Success

Successful implementation of a regional shared micromobility program will require close collaboration between all involved parties and clear delineation of roles and responsibilities. This section will discuss the roles, responsibilities and considerations for each agency level in the Decentralized Cooperative Regional Model.

ODOT

As previously mentioned, ODOT will be limited to a supporting role during the implementation and operation of a regional system. The two main areas will be coordination among participants and a potential source of funding. Specifically, ODOT's role will center on:

- Identify participating cities
- Convening lead agencies representing participating metro areas

- Facilitating peer-to-peer information sharing and, where appropriate developing templates in the case of policies or processes that can function similarly across different shared micromobility service areas
- Administering applicable grant funds and advising lead agencies on applicable state and/or federal funding opportunities

Regional Agencies

Agencies at the regional level have the opportunity to play a key role in the development of a regional system. While not all regional agencies have the capacity to dedicate resources toward such a program, they have the potential to foster collaboration among neighboring jurisdictions. In this model, a regional agency will want to consider:

- Identifying participating cities within their jurisdiction
- Helping to identify the lead agency (or serving as one, if appropriate) for participating metro area(s) in their jurisdiction
- Advising lead agency and/or participating cities on applicable state and/or federal funding opportunities
- Possibly administer RFP process and ongoing contract management with operator

Local Agencies (Cities/Towns)

Agencies at the local level will play a crucial role in the implementation of the program. They will be closest to the day-to-day operations and will likely be the first point of contact for the public regarding the program. In this model, an interested city will want to consider:

- Capacity to serve as the lead agency or partner with city identified as best suited to be lead agency for metro area
- Seeking/applying for applicable state and/or federal funding opportunities
- Possibly administer RFP process and ongoing contract management with operator

Next Steps

This memo is the culmination of work in exploring the idea of a regional interoperable shared micromobility system in Oregon. It became clear during this process that there is a desire across the state to continue and establish new shared micromobility services. If participating agencies are committed, this study provides a path toward regional cooperative systems with ODOT support through the Innovative Mobility Program (IMP). **Table 5** shows a potential implementation timeline for establishing a regional cooperative system.

Table 5. Timeline to Establish Decentralized Cooperative Regional System

Timeline	Steps	Responsible Entity
Summer/fall 2025 (2-3 months)	Confirm participating agencies Identify lead agencies Explore funding opportunities, such as IMP Conduct local preparations	ODOT Local Agencies Local Agencies
Winter 2025 (2-4 months)	Establish governance committee Adopt committee bylaws	ODOT Lead Agencies
Spring 2026 (2-3 months)	Develop cooperative RFP	Lead Agencies
Summer 2026	Release cooperative RFP to select operator	Lead Agencies
Fall 2026 (1-3 months)	Participating agencies negotiate contracts with selected operator	Local Agencies
Winter 2026/spring 2027 (3-6 months)	Participating agencies purchase equipment for systems or apply for IMP funding for equipment purchase	Local Agencies
Summer 2027	Launch shared micromobility systems	Local Agencies

Additional information on the steps needed to stand up a micromobility program and the roles and responsibilities of agency participants are covered in Technical Memo #4.