

Salem Area Mass Transit District  
BOARD OF DIRECTORS

Thursday, February 23, 2017  
6:30 PM Regular Meeting

Courthouse Square–Senator Hearing Room  
555 Court Street NE, Salem, Oregon 97301

**AGENDA**

**REGULAR BOARD MEETING**

**A. CALL TO ORDER & NOTE OF ATTENDANCE**

**B. PLEDGE OF ALLEGIANCE** – Board Secretary John Hammill

**C. ANNOUNCEMENTS & CHANGES TO AGENDA**

**D. PRESENTATION** - None

**E. PUBLIC COMMENT** - Each person’s comments are limited to three (3) minutes.

**F. CONSENT CALENDAR**

**1. Routine Business Items [Action]**

a. Adopt Resolution No. 2017-01 to Amend the Non-Bargaining Retirement Pension Plan ..... **1**

**G. ITEMS DEFERRED FROM THE CONSENT CALENDAR**

**H. ACTION ITEMS**

- 1. Approve STF Advisory Committee Recommendations for the Allocations of Federal 5310 and State STF Projects for FY2018-2019 ..... **7**
- 2. Authorize General Manager to Execute a Contract Modification (Amendment) with McNeilus Truck and Manufacturing to Purchase 84 CNG Tanks and Tank Valves for \$242,540 ..... **304**

**I. INFORMATION ITEMS**

**J. REPORTS**

- 1 Performance Report – Second Quarter ..... **306**
- 2. Trip Choice (aka Rideshare) Report – Second Quarter ..... **329**
- 3. Finance Report – Second Quarter ..... **337**
- 4. Board Subcommittee Reports [*Receive and File*] ..... **347**
  - a. January 9, 2017 Work Session ..... **348**

**K. BOARD & MANAGEMENT ISSUES**

- 1. General Manager
- 2. Board President
- 3. Board of Directors

## L. ADJOURNMENT

**SPECIAL ACCOMODATIONS** Those individuals needing special accommodations such as sign or other language interpreters to participate in the Board meeting must request such services at least 48 hours prior to the meeting. Please direct your request to the Executive Assistant in the General Manager's Office at 503-588-2424. Hearing impaired please call Oregon Telecommunications Relay Service, 711.

**ALOJAMIENTOS** especial aquellos individuos que necesitan adaptaciones especiales como el signo u otros intérpretes de la lengua para participar en la reunión del Consejo deben solicitar estos servicios al menos 48 horas antes de la reunión. Por favor dirija su solicitud a la Asistente Ejecutiva en la oficina del Gerente General en 503-588-2424. Problemas de audición llame al servicio de retransmisión de telecomunicaciones Oregon, 711.

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**Next Regular Board Meeting Date: Thursday, March 23, 2017**

Regular Board meetings are televised and can be viewed on CCTV's website: [www.cctvsalem.org](http://www.cctvsalem.org).  
Go to [www.cherriots.org/board](http://www.cherriots.org/board) for an electronic copy of the Board's agenda packet.

Cherriots Administration Office ~ 555 Court Street NE, Suite 5230 ~ Salem, OR 97301  
Phone (503) 588-2424 ~ Board of Directors Email Address: [Board@cherriots.org](mailto:Board@cherriots.org)

**MEMO TO: BOARD OF DIRECTORS**

**FROM: PAULA DIXON, DIRECTOR OF ADMINISTRATION**

**THRU: ALLAN POLLOCK, GENERAL MANAGER**

**SUBJECT: AMENDMENT TO NON BARGAINING RETIREMENT PLAN**

**Issue**

Shall the Board adopt Resolution #2017-01 amending the non-bargaining Defined Benefit Plan changing the pre-retirement survivor benefit from 50% to 100%?

**Background and Findings**

The current defined benefit plan provides that on the death of a married employee before retirement, it will pay a 50% survivor annuity benefit to the surviving spouse. That is the minimum required by federal pension law. It is what most private sector pension plans provide and what OPSRP (for PERS members first employed after August 2003) now provides. For example, if the employee has earned the right to a pension of \$1,000/month for life but then dies before retirement, the plan will pay \$500/month to the surviving spouse for the spouse's lifetime. The other \$500/month is forfeited back to the plan.

As part of the labor agreement adopted this year with respect to the bargaining-unit defined benefit plan, the pre-retirement survivor benefit when an employee dies before retirement was increased from 50% to 100%. This proposed amendment (Attachment A) would make the same change to the non-bargaining plan.

**Financial Impact**

There is a small pension cost to this amendment. In funding the plan, the pension actuaries take into account the probability that some employees will die before retirement and that the plan will receive back 50% of the funds otherwise set aside for that employee. So there is a savings to the plan figured into the funding calculations. Therefore to provide a surviving spouse 100% of the deceased employee's benefit, rather than just 50%, results in a new cost to the plan. The pension actuaries have estimated this additional cost for this plan to be \$3,500 (from \$509,242 to \$512,754) for the year ending June 30, 2017.

**Recommendation**

Staff recommends adoption of Resolution #2017-01.

**Proposed Motion**

**I move the Board adopt Resolution #2017-01 amending the non-bargaining Defined Benefit Plan changing the pre-retirement survivor benefit from 50% to 100%.**



## **RESOLUTION #2017-01**

### **SALEM AREA MASS TRANSIT DISTRICT NON-BARGAINING UNIT RETIREMENT PLAN**

**WHEREAS**, by Resolution #01-19, the District established the Salem Area Mass Transit District Non-Bargaining Unit Retirement Plan ("the Plan"), which is a form of floor offset defined benefit retirement plan, for its full-time career service non-bargaining unit employees, effective January 1, 2002;

**WHEREAS**, the Plan was most recently amended and restated pursuant to Resolution #2015-08 to comply with the current requirements of the Internal Revenue Code and the Internal Revenue Service as set forth in IRS Notice 2014-77, so as to retain its status as a "qualified" plan.

**WHEREAS**, the Plan presently provides that upon the death of a participant before retirement, the pre-retirement survivor benefit payable to a surviving spouse or surviving registered domestic partner is 50% of the participant's accrued benefit at the time of death. In bargaining, with regard to the bargaining unit plan, the District agreed that the pre-retirement survivor benefit for a bargaining unit participant who dies before retirement would be increased from 50% to 100% of the participant's accrued benefit.

**WHEREAS**, the District believes that the same increase in the pre-retirement survivor benefit should be provided for surviving spouses and surviving registered domestic partners of participants in the non-bargaining unit plan who die before retirement.

#### **NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF DIRECTORS OF THE SALEM AREA MASS TRANSIT DISTRICT:**

**THAT** Resolution #2017-01 shall be adopted to direct that the Plan shall be amended to increase the pre-retirement survivor benefit for surviving spouses and surviving registered domestic partners of participants in the Plan who die before retirement from 50% of the participant's accrued benefit to 100% of the participant's accrued benefit.

**THAT** the General Manager shall be authorized and directed to execute an appropriate Amendment to the Plan to implement this Resolution, to be effective upon signing of the Amendment.

**RESOLUTION #2017-01**

**SALEM AREA MASS TRANSIT DISTRICT  
NON-BARGAINING UNIT RETIREMENT PLAN**

**ADOPTED BY THE BOARD OF DIRECTORS OF THE SALEM AREA MASS TRANSIT  
DISTRICT this 23<sup>rd</sup> day of February, 2017.**

ATTEST:

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President Robert Krebs  
SAMTD Board of Directors

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John Hammill, Secretary  
SAMTD Board of Directors

**THE SALEM AREA MASS TRANSIT DISTRICT DEFINED BENEFIT PLAN  
FOR NON-BARGAINING UNIT EMPLOYEES**

**PLAN AMENDMENT**

THE SALEM AREA MASS TRANSIT DISTRICT DEFINED BENEFIT PLAN FOR NON-BARGAINING UNIT EMPLOYEES (the "Plan"), was originally adopted effective January 1, 2002 by THE SALEM AREA MASS TRANSIT DISTRICT (the "Employer").

The Plan was most recently restated on January 26, 2016 in compliance of Access to Care for Medicare Beneficiaries and Pension Relief Act of 2010, the Moving Ahead for Progress in the 21st Century Act, the American Taxpayer Relief Act of 2012, the Highway and Transportation Funding Act of 2014, the Cooperative and Small Employer Charity Pension Flexibility Act, and the IRS regulations and guidance referenced in IRS Notice 2014-77. The Plan as restated was effective January 1, 2010, except as otherwise provided.

Having reserved the right to do so, the Employer now wishes to amend the Plan to update the Employee Death Benefit section. This amendment shall be effective July 1, 2016 with respect to deaths occurring on or after that date.

1. Therefore, **Section 8.5(a) "Employee Death Benefit"** is amended to read as follows:

"(a). The survivor Benefit shall be a monthly benefit for the life of the surviving spouse, commencing on the first day of the second month following the date of the Participant's death and continuing through and including the first day of the month of the surviving spouse's death. The amount of the monthly survivor benefit shall be determined as if the Participant terminated on his or her date of death and commenced payment of a 100% Survivor Annuity as described under Section 8.4(b) on the first day of the second month following the date of the Participant's death, reduced for the 100% Survivor Annuity benefit form in accordance with Exhibit A, Part 1. If on the date of death the Participant was under age 60 and with less than the thirty (30) years of Vesting Credits, then the survivor benefit shall be further reduced in accordance with Section 8.3 to the Participant's actual age on the date of death but not below age 55, and if the Participant was under age 55 on the date of

death then the survivor benefit shall be further actuarially reduced for commencement prior to age 55 in accordance with Section 1.2.

2. In all other respects, the Plan shall remain the same.

This action is being taken pursuant to the authority granted to the General Manager by the Board of Directors of the District in Resolution #2017-01.

Dated this \_\_\_\_\_ day of \_\_\_\_\_, 2017.

SALEM AREA MASS TRANSIT DISTRICT

By \_\_\_\_\_  
Allan Pollock, General Manager

**EMPLOYER**

**ACCEPTED:**

PIONEER TRUST BANK, N.A.

By \_\_\_\_\_  
Its Trust Officer

**TRUSTEE**



**MEMO TO: BOARD OF DIRECTORS**

**FROM: TANYA DEHART, CHAIR  
SPECIAL TRANSPORTATION FUND (STF) ADVISORY COMMITTEE  
STEVE DICKEY, DIRECTOR OF TRANSPORTATION DEVELOPMENT**

**THRU: ALLAN POLLOCK, GENERAL MANAGER**

**SUBJECT: APPROVAL OF STF ADVISORY COMMITTEE RECOMMENDATIONS FOR  
THE ALLOCATIONS OF FEDERAL SECTION 5310 AND STATE STF  
PROJECTS FOR FY2018 AND 2019**

**Issue**

Shall the Board approve the recommendations of the Special Transportation Fund (STF) Advisory Committee for the allocation of Federal Section 5310 and State STF projects for Fiscal Years 2018 and 2019?

**Background and Findings**

The Oregon Department of Transportation (ODOT) released a solicitation in December 2016 for Section 5310 (Enhanced Mobility of Seniors and Individuals with Disabilities) and STF programs (a State allocated fund primarily to be used for transportation for seniors and individuals with disabilities) for the period beginning July 1, 2017 and ending June 30, 2019. Additionally, the Federal Transit Administration (FTA) allocates Section 5310 funds directly to Salem Area Mass Transit District (SAMTD) for projects that serve seniors and people with disabilities that operate within the Salem-Keizer urban growth boundary. These funds are available for the Federal Fiscal Year 2018, beginning October 1, 2017 through September 30, 2018.

The District, serving as the STF agency, was allocated \$2,145,560 for Section 5310 and \$1,977,898 for the STF program for a two-year period. These funds are eligible for projects that are in Marion and/or Polk counties and serve seniors and individuals with disabilities. The District published public notices as shown in Attachment A, in the Statesman Journal newspaper in English and in Spanish and on the Cherriots website. The print ad appeared in the Statesman Journal on December 12, 2016. The website ads in English and Spanish also appeared on December 12. The application deadline was January 30, 2017. The ads posted on the website are provided as Attachment B. This short application window is typical for the compressed timeline. Applications must be sent to ODOT by the agreed deadlines in order for the funds to be available by July 1, 2017. Due to the fact that the District's February Board meeting came after the

established statewide deadline of February 17, 2017, an extension was negotiated with ODOT allowing applications to be submitted by February 24, 2017.

In accordance with ODOT's recommended grant application process, a Technical Advisory Committee (TAC) was formed as a complimentary committee to the STF Advisory Committee (STFAC) to receive applications and deliberate their merits. The TAC consisted of five STFAC members, one member of the public, and one representative of the Mid-Willamette Valley Council of Governments. The TAC met in a public meeting on February 7, 2017 to listen to presentations from organizations applying for Section 5310 and STF funds. Both the ODOT pass-through and FTA-direct Section 5310 grants were discussed along with the STF grant applications.

The TAC made a formal recommendation to the STFAC at its February 7, 2017 meeting, and the STFAC had an official meeting on the same day to accept the recommendations of the TAC. This recommendation is hereby forwarded to the Board of Directors for approval. All STFAC meetings are open to the public, but no public comments were received in regards to these applications. Copies of the Section 5310 and STF applications are provided as ***Attachment C***.

Tables 1-3 below summarize the applications submitted with the total amounts requested also noted.

The total funds requested from the STF program was \$226,524 greater than the allocated amount of \$1,977,898. The STFAC recommends the funds be allocated as shown in **Table 1** below.

Table 1. Recommendation Amounts for STF Projects

<b>Applicant</b>	<b>Grant</b>	<b>Description</b>	<b>Requested Amount</b>	<b>Recommended Amount</b>
Salem Health	STF	Salem Health Medical Transportation Coordinator	\$ 82,335	\$ 20,000
Partnerships in Community Living, Inc.	STF	New Vehicle Purchase for Disability Supports and Services	\$ 54,216	\$ -
SAMTD	STF	Operations (CARTS, CherryLift, RED Line), grant match and contingency	\$ 1,489,898	\$ 1,479,898
City of Silverton	STF	Silver Trolley, 5311 Match	\$ 40,000	\$ 33,000
Salem Health West Valley Foundation	STF	Connections Van providing medical transportation	\$ 61,484	\$ 45,000
City of Woodburn	STF	Woodburn Transit System Services	\$ 439,000	\$ 400,000
City of Woodburn	STF	Woodburn Vehicle Replacement	\$ 37,489	\$ -
<b>Total 2017-19 Marion-Polk Counties STF Allocation</b>				<b>\$ 1,977,898</b>

Due to an approximately 17% reduction in STF revenues, cuts to all requested amounts had to be made. The Transportation Coordinator project at Salem Hospital applied for \$82,335 in STF funds to fully fund their expanding coordination project. However, this project was originally funded knowing that it was a pilot project and not an ongoing sustainable funding source for the hospital. Since funds are short this biennium, the STFAC recommends only awarding \$20,000 to Salem Health for this project.

Two new vehicles were requested using STF funds. One from Partnerships in Community Living, Inc. (PCL) and one from the City of Woodburn. The STFAC recommends not funding either of these projects due to the shortfall of funds. The committee cited the fact that these organizations have other vehicles available to them, even though many of their vehicles are old and need to be replaced.

The STFAC recommends that the level of STF funding for operations of CARTS, CherryLift, and RED Line at a level slightly less than the original ask. A high priority for preserving existing service was given by committee members. The application states that service

would need to be reduced in the second year of the biennium if the grant funds were scaled down. Also, if STF funds are not allocated to SAMTD for operations of required paratransit service, resources may need to be used at the expense of other district programs.

The STFAC recommends that funding to match the FTA Section 5311 grant for the City of Silverton be funded at their scaled request amount. Their preventative maintenance costs have gone up in the past year while the City of Woodburn has reported a dramatic decrease in their maintenance costs.

Salem Health West Valley Hospital Foundation's project is recommended to be funded at about 70 percent of their original request. The Connections Van program fills many gaps in Polk County service and there may be funding through the hospital foundation rather than STF to round out the project as the hospital desires.

The City of Woodburn's operations grant (STF) is recommended to be funded at \$39,000 less than their original request due to the shortfall in funding and their description that a reduction in funds would only mean a reduction in the number of weekly dial-a-ride trips traveling outside the city boundaries (from 57/week to 47/week).

**Table 2** below shows the STFAC's recommendation for funding the Federal Section 5310 (ODOT) grant applications. The total amount requested for was slightly less (\$4,457) than the allocated amount. The STFAC recommends that the City of Woodburn be allocated the extra funds and be allowed to select which project(s) it would dedicate the funds towards. When asked this question, the City of Woodburn responded to put all \$4,457 towards their mobility management project.

ODOT has requested applicants to provide a 110 percent list of projects to be funded as part of the STF grant application. This list will be taken to the Legislature to show the statewide need for STF dollars. The total dollar amount requested with the original applications was approximately 111 percent of the District's allocation. Therefore, all projects that are not recommended for funding will appear on the final list, but with the designation of "unfunded" clearly called out. Likewise, reductions of funded projects will also be itemized as "unfunded" on the 110 percent list.

**Table 2** below shows the recommended amounts for applications for Section 5310 (ODOT) grant allocation. The total allocated by ODOT was \$4,457 greater than the total of all applications. The STFAC recommended that the City of Woodburn receive those extra funds to offset some of the cuts made in STF funds. When asked, the city elected to allocate the \$4,457 to their mobility management project, which is reflected in the "recommended amount" below.

Table 2. Recommendation Amounts for 5310 (ODOT) Projects

<b>Applicant</b>	<b>Grant</b>	<b>Description</b>	<b>Amount Requested</b>	<b>Recommended Amount</b>
SAMTD	5310 (ODOT)	Mobility Management - Cherriots	\$ 403,946	\$ 403,946
SAMTD	5310 (ODOT)	CARTS Preventative Maintenance	\$ 359,055	\$ 359,055
SAMTD	5310 (ODOT)	Purchased Service (CARTS, CherryLift and RED Line)	\$ 1,184,256	\$ 1,184,256
City of Silverton	5310 (ODOT)	Silver Trolley Preventative Maintenance	\$ 11,500	\$ 11,500
City of Woodburn	5310 (ODOT)	Woodburn Mobility Management Program	\$ 84,346	\$ 88,803
City of Woodburn	5310 (ODOT)	Woodburn Preventative Maintenance Program	\$ 98,000	\$ 98,000
<b>Total 2017-19 Marion-Polk Counties 5310 Allocation</b>				\$ 2,145,560

Table 3 below shows the recommended funding levels for the Federal Section 5310 (FTA) grant applications. No external applications were received from this grant source. As an FTA designated recipient, Cherriots receives these funds directly from the FTA.

Table 3. Recommendation Amounts for 5310 (FTA) Projects

<b>Applicant</b>	<b>Grant</b>	<b>Description</b>	<b>Amount Requested</b>	<b>Recommended Amount</b>
SAMTD	5310 (FTA)	Mobility Management, Call Center and Partnership Coordination	\$ 110,722	\$ 110,710
SAMTD	5310 (FTA)	RED Line Preventative Maintenance	\$ 14,960	\$ 14,960
SAMTD	5310 (FTA)	RED Line Service Operations	\$ 102,830	\$ 102,830
<b>Total 2017-18 Salem-Keizer 5310 (FTA) Allocation</b>				\$ 228,500

\*Note: Since the "Total 2017-18 Salem-Keizer 5310 (FTA) Allocation" has not been formally announced in the Federal Register at this time, SAMTD will be allowed to determine the distribution of actual funds once the final amount is known.

### **Fiscal Impacts**

All of the applications recommended for funding in Tables 1-3 above will be funded by external ODOT and FTA grants. There is a net positive fiscal impact to both the District and external agencies if the recommendation is accepted. As shown in Tables 1-3 above, the net positive fiscal impacts are \$1,977,898 for STF, \$2,145,560 for Section 5310 (ODOT), and \$228,500 (estimated) 5310 (FTA). These funds will be received over the 2017-2019 biennium for STF and 5310 (ODOT) and in Federal Fiscal Year 2018 for 5310 (FTA).

Due to a statewide reduction (approximately 17%) in STF dollars available for the 2017-19 biennium, there is a reduction in funding for all programs recommended above. The current biennium (2015-17) had a \$2,406,208 allocation for STF compared to \$1,977,898 for the future biennium (2017-19). This represents a total of \$428,310 less STF funds allocated to the District for the next two years. On the other hand, the District will receive \$77,296 in additional Section 5310 funds this coming biennium compared to the past (\$2,068,264 was received in 2015-17 compared to \$2,145,560 for 2017-19).

### **Recommendation**

The STF Advisory Committee recommends that the Board approve the 2017-2019 applications for STF, Section 5310 (ODOT) and Section 5310 (FTA) grants as shown in Tables 1-3, and direct the General Manager to submit the applications for Section 5310 (ODOT) and STF no later than February 24, 2017 to the ODOT Rail and Public Transit Division for consideration. The applications for 5310 (FTA) funds shall be submitted directly to the Federal Transit Administration since Salem Area Mass Transit District (SAMTD) is a designated recipient of these funds.

### **Proposed Motion**

**I move the Board approve the 2017-2019 applications for STF, Section 5310 (ODOT) and Section 5310 (FTA) grants as shown in Tables 1-3, and direct the General Manager to submit the applications for Section 5310 (ODOT) and STF no later than February 24, 2017 to the ODOT Rail and Public Transit Division for consideration. The applications for 5310 (FTA) funds shall be submitted directly to the Federal Transit Administration since SAMTD is a designated recipient of these funds.**

Attachment A: Public Notice



Order Confirmation for Ad #: 0001777416

**Customer:** SALEM-KEIZER TRANSIT  
**Address:** 555 COURT ST NE STE 5230  
 SALEM OR 97301 USA  
**Acct. #:** SAL-899389  
**Phone:** 5035882424

SALEM-KEIZER TRANSIT  
**Ordered By:** Jolynn Franke

Order Start Date: 12/12/2016      Order End Date: 12/12/2016

<u>Tear Sheets</u>	<u>Affidavits</u>	<u>Blind Box</u>	<u>Promo Type</u>	<u>Materials</u>	<u>Special Pricing</u>	<u>Size</u>
0	1					2 X 5.68

<u>Net Amount</u>	<u>Tax Amount</u>	<u>Total Amount</u>	<u>Payment Method</u>	<u>Payment Amount</u>	<u>Amount Due</u>
\$760.85	\$0.00	\$760.85	Invoice	\$0.00	\$760.85

**Ad Order Notes:**

Sales Rep: kcharlton      Order Taker: kcharlton      Order Created: 12/05/2016

Product	# Ins	Start Date	End Date
SAL-Online	1	12/12/2016	12/12/2016
12-12-16, SAL-SJ Classifieds	1	12/12/2016	12/12/2016
12-12-16,			

Attachment A: Public Notice

**Text of Ad:** 12/05/2016

**PUBLIC NOTICE**

**FUNDS AVAILABLE FOR TRANSPORTATION PROJECTS  
OPEN TO THE PUBLIC  
SERVING SENIORS AND INDIVIDUALS WITH DISABILITIES**

The Oregon Department of Transportation's (ODOT) Rail and Public Transit Division (RPTD) has announced the availability of 2017-2019 biennium (July 1, 2017 - June 30, 2019) public transit funding for the State Special Transportation Fund (STF) and Federal Section 5310 grant programs. The STF and Section 5310 grant programs are managed by ODOT in partnership with Salem Area Mass Transit District (SAMTD) to plan, maintain, or improve transportation services for seniors and individuals with disabilities within Marion and Polk counties. The grant programs are valued at \$1,977,898 (STF) and \$1,994,514 (Section 5310 ODOT).

Additionally, SAMTD administers Section 5310 funds directly from the Federal Transit Administration (FTA) for projects located within the Salem-Keizer urbanized area. FTA will be announcing FY17 5310 formula allocations soon (estimated at \$228,500 for one year). Matching local funds are required for the ODOT and FTA 5310 grants, dependent on the type of project proposed. STF-funded projects do not require local matching dollars.

A Technical Advisory Committee (TAC) will review and rank applications for STF, Section 5310 (through ODOT), and Section 5310 (FTA-direct) dollars. The Special Transportation Fund Advisory Committee (STFAC) will review the TAC's findings and make a recommendation to the SAMTD Board. There will be time for public testimony at the TAC and STFAC meetings. Full details of the process, including applications, instructions, and dates/times of the public meetings, will be available at [cherriots.org/grantapplication](http://cherriots.org/grantapplication) beginning Dec. 12, 2016.

One eligibility requirement for all three grants is that projects must be listed in the Cherriots "Coordinated Public Transit - Human Services Transportation Plan" dated August 2016. Please refer to the corresponding grant application instructions for all of the eligibility requirements for organizations and projects.

A grant training session will be held to assist in the application process on Jan. 10, 2017, 3:00 p.m. to 4:30 p.m. at the Cherriots Administration Office, 555 Court St NE, Suite 5230, Salem, OR 97301. New applicants are encouraged to attend.

Any organization interested in submitting a proposal should contact Ted Stonecliffe, SAMTD, 555 Court St NE, Suite 5230, Salem, OR 97301, phone 503-588-2424, e-mail [ted.stonecliffe@cherriots.org](mailto:ted.stonecliffe@cherriots.org) for details. Applications must be received by noon, Jan. 30, 2017, to be considered.

Si desea una copia de este aviso público en español, por favor visite el sitio web a partir del 12 de diciembre 2016 (<http://cherriots.org/grantapplication>) o por teléfono: 503-588-2424.

Statesman Journal December 12, 2016





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## Now Accepting Applications to Fund Projects that Serve Older Adults and People with Disabilities

DEC 12, 2016

Cherriots is now accepting applications for **transportation projects that are open to the public, and serve older adults and people with disabilities** within Marion and Polk Counties. Funding comes from the state Special Transportation Fund (STF) and federal Section 5310 grant programs. Cherriots is the designated agency to distribute these funds in Marion and Polk Counties.

Eligible applicants include:

- Cities within Marion and Polk Counties
- Marion and Polk Counties
- Transportation Districts
- Councils of Government
- Individuals
- Public and private nonprofits with managerial and financial capabilities to provide transportation services
- Any of these joined in cooperative agreements

Eligible projects include:

- Projects that will deliver new and innovative ways to improve mobility for seniors and people with disabilities, including rides for wellness and access to travel information
- Capital purchases, such as vehicles, passenger shelters and equipment
- Operational and administrative costs
- Vehicle and facility preventative maintenance
- Travel information
- Planning
- New systems for improving access to transportation (for example, travel training, marketing, centralized call centers)
- Local match for federal public transportation capital, operations or mobility management projects

Project Selection Criteria:

- Priority is given to projects that match goals and objectives listed in the Cherriots [Coordinated Public Transit – Human Services Transportation Plan](#) dated August, 2016.

- Projects must be cost effective and coordinate services between transportation providers to avoid providing duplicate service.
- Each project submitted to Cherriots will be reviewed for regional value. Projects will be evaluated on the degree to which they advance the Oregon Department of Transportation's (ODOT) four public transportation goals as they relate, in particular, to older adults and people with disabilities (please see the application instructions for further information).

Further Details:

Public testimony about projects will be accepted at the Cherriots STF Advisory Committee meetings. Applicants can contact Ted Stonecliffe, Cherriots Planning Analyst, at 503-588-2424 or [ted.stonecliffe@cherriots.org](mailto:ted.stonecliffe@cherriots.org) for application assistance.

Funds are limited, and a local match may be required to qualify for funding. Please see the individual grant application instructions for timelines of the grant funding.

A grant training session will be held to assist in the application process on January 10, 2017, 3 to 4:30 p.m. at the Cherriots Administration Office, 555 Court St NE, Suite 5230, Salem, OR 97301. New applicants are encouraged to attend.

The application deadline is 12 p.m. Friday, January 30, 2017. Applications will be reviewed and ranked by the Cherriots Technical Advisory Committee on Tuesday, February 7, 2017. This meeting is open to the public and will be held at 555 Court St NE, Suite 5230, Mill Creek Conference Room, Salem OR 97301. This committee will provide final recommendations to the Cherriots Board of Directors. The final decision will be made at the Thursday, February 23, 2017 board meeting.

Funding for these projects comes from state and federal sources, including the state ODOT Rail and Public Transit Division Special Transportation Fund and [federal Section 5310 grant programs](#).

[Download 5310\(ODOT\) Grant Application](#)

[Download 5310 \(ODOT\) Grant Application Instructions](#)

[Download 5310\(FTA\) Grant Application](#)

[Download 5310 \(FTA\) Grant Application Instructions](#)

[Download \(STF\) Grant Application](#)

[Download \(STF\) Grant Application Instructions](#)

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Salem - Keizer Transit

Rider Info: (503) 588-BUSS

Administration: (503) 588-2424

555 Court St. NE, Suite 5230 Salem, OR 97301 [Hours of Operation](#)



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## Ahora, Aceptando Solicitudes para Financiar Proyectos que le den Servicio a Adultos Mayores y Personas con Discapacidades

DEC 15, 2016

Cherriots ahora está aceptando solicitudes para **proyectos de transporte abiertos al público, y que le den servicio a adultos mayores y personas con discapacidades** dentro de los Condados de Marion y Polk. El financiamiento viene del Fondo Especial de Transporte (STF) del estado y los programas federales de subvención Sección 5310. Cherriots es la agencia designada para distribuir estos fondos en los Condados de Marion y Polk.

Los solicitantes elegibles incluyen:

- Ciudades dentro de los Condados de Marion y Polk
- Condados de Marion y Polk
- Distritos de transporte
- Consejos del gobierno
- Personas
- Organizaciones sin fines de lucro públicas y privadas con capacidades gerenciales y financieras para brindar servicios de transporte
- Cualquiera de estos unidos en convenios cooperativos

Los proyectos elegibles incluyen:

- Proyectos que entregaran formas nuevas e innovadoras para mejorar la movilidad de adultos mayores y personas con discapacidades, incluyendo viajes para bienestar y acceso a información de viajes
- Compras de capital, como vehículos, albergues de pasajeros y equipo
- Costos operativos y administrativos
- Mantenimiento preventivo de vehículo e instalación
- Información de viajes
- Planificación
- Nuevos sistemas para mejorar el acceso al transporte (por ejemplo, capacitación sobre viajes, mercadeo, centros de llamadas centralizados)
- Participación local para capital de transporte público federal, operaciones o proyectos de gestión de la movilidad

Criterios de selección de proyectos:

- Se le da prioridad a proyectos que coinciden con metas y objetivos enumerados en el [Tránsito Público Coordinado Cherriots – Plan de Transporte de Servicios Humanos](#) de

recna agosto de 2016.

- Los proyectos deben ser rentables y los servicios coordinados entre los proveedores de transporte para evitar brindar servicios duplicados.
- Cada proyecto presentado a Cherriots será revisado en busca de valor regional. Los proyectos serán evaluados en el grado al cual avanzan a las cuatro metas de transporte público de del Departamento de Transporte de Oregón (ODOT) en lo que concierne, en particular, a adultos mayores y personas con discapacidades (por favor, consulte las instrucciones de la solicitud para obtener más información).

Detalles adicionales:

Se aceptará testimonio público acerca de proyectos en las reuniones del Comité Asesor STF de Cherriots. Los solicitantes pueden comunicarse con Ted Stonecliffe, Analista de Planificación de Cherriots, llamando al 503-588-2424 o en [ted.stonecliffe@cherriots.org](mailto:ted.stonecliffe@cherriots.org) para obtener ayuda en la solicitud.

Los fondos son limitados, y es posible que se requiera participación local para calificar para el financiamiento. Por favor, consulte las instrucciones de la solicitud de subvención individual para obtener los plazos del financiamiento de la subvención.

Se llevará a cabo una sesión de capacitación para ayudar en el proceso de solicitud el 10 de enero de 2017, de 3:00 a 4:30 p.m. en la Oficina de Administración de Cherriots, 555 Court St NE, Suite 5230, Salem, OR 97301. Se exhorta a que los solicitantes nuevos asistan.

La fecha y hora límites para presentar la solicitud es 12 p.m. del viernes 30 de enero de 2017. Las solicitudes serán revisadas y clasificadas por el Comité Asesor Técnico de Cherriots, el martes, 7 de febrero de 2017. Esta reunión está abierta al público y se llevará a cabo en 555 Court St NE, Suite 5230, Mill Creek Conference Room, Salem OR 97301. Las recomendaciones serán remitidas al Comité Asesor de Fondos de Transporte Especial y discutidas en una reunión que se llevará a cabo el lunes, 2 de febrero. El comité brindará recomendaciones finales a la Junta Directiva de Cherriots. La decisión final se tomará en la reunión de la junta el jueves, 23 de febrero de 2017.

El financiamiento para estos proyectos viene de fuentes estatales y federales, incluyendo el Fondo de Transporte Especial de la División de Tránsito Ferroviario y Público del ODOT y de [programas federales de subvención de la Sección 5310](#).

[Descargar 5310 \(ODOT\) solicitud](#)

[Descargar 5310 \(ODOT\) instrucciones](#)

[Descargar 5310 \(FTA\) solicitud](#)

[Descargar 5310 \(FTA\) instrucciones](#)

[Descargar 5310 \(STF\) solicitud](#)

[Descargar 5310 \(STF\) instrucciones](#)

Salem - Keizer Transit

Información de Pasajeros: (503) 588-BUSS

Administración: (503) 588-2424

555 Court St. NE, Suite 5230 Salem, OR 97301 Hours of Operation

**2017-2019 Special Transportation  
Fund (STF) Grant Application  
for Projects Located Within Marion and  
Polk Counties**



**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

**INTRODUCTION**

- Read page 4 of the *Special Transportation Fund Instructions* for project and agency eligibility. The instructions are available on the ODOT Rail and Public Transit website: (<http://www.oregon.gov/ODOT/PT/Pages/news.aspx>).
- Use the instructions as a reference while filling out the application form.
- Each project submitted for funding consideration must have its own application.
- Selection criteria are detailed in Section 5 of the *Application Instructions*.
- This form must be filled out using Microsoft Word and submitted as a Word or Adobe .pdf document. Paper applications will NOT be accepted.
- Signature pages should be scanned and attached as separate pages to each application.

**Submittal Checklist**

***Make sure***

- ✓ Application is complete, signed, and dated

***Submit***

- ✓ Proof of agency status (template included in application packet)
- ✓ Ethnic and Racial Impact Statement
- ✓ Maintenance Plan (if submitting an application for preventive maintenance)

**A. ORGANIZATION INFORMATION**

**Name of Organization: City of Woodburn**

**Contact Person: Kathleen McClaskey**

**Address: 270 Montgomery St. Woodburn, Oregon 97071**

**Telephone: (503) 982-5245**

**Email: [Kathleen.mcclaskey@ci.woodburn.or.us](mailto:Kathleen.mcclaskey@ci.woodburn.or.us)**

**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

**Type of Organization (check one)**

Government Agency	<input checked="" type="checkbox"/>
Private Not-for-Profit	<input type="checkbox"/>
Other	<input type="checkbox"/>

**Area of service (check one)**

Inside Marion and Polk Counties	<input checked="" type="checkbox"/>
Outside Marion and Polk Counties	<input type="checkbox"/>
Both inside and outside Marion and Polk Counties	<input type="checkbox"/>

**Organization Days and Hours of Operation**

Day	Hours
Sunday	
Monday	7:00 AM – 7:00 PM
Tuesday	7:00 AM – 7:00 PM
Wednesday	7:00 AM – 7:00 PM
Thursday	7:00 AM – 7:00 PM
Friday	7:00 AM – 7:00 PM
Saturday	
Please list any planned periods of service closure greater than 3 days (i.e., closed the week between Christmas Day and New Year's Day)	

**Total transportation program costs by year**

FY16 (historical data, if applicable)	FY17 (projected, if applicable)	FY18 (projected)	FY19 (projected)
\$641,806	\$677,044	\$693,407	\$720,949

**B. PROJECT INFORMATION**

**Project Title** *(will be used for reviewer reference and in public comment process. Example: Mobility Management for The Confederated Tribes of Grand Ronde)*

Woodburn Transit System Services
----------------------------------

**Project service area to be served** *(indicate the geographic features that define your service area such as streets, rivers, or jurisdictional boundaries)*

North boundary	Woodburn City Limits
West boundary	Woodburn City Limits
South boundary	Woodburn City Limits
East boundary	Woodburn City Limits
Other general geographic area (i.e., within the City of Woodburn)	Within the Woodburn City Limits

*Optional: please provide a map of your service area as a separate single page 8.5"x11"*

**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

attachment.

**Total STF funds requested**

\$439,000.00
--------------

**Start date**

July 1, 2017
--------------

**Funding request type (check one)**

Continuation of existing service at same level of service	<input checked="" type="checkbox"/>
Expansion of existing service	<input type="checkbox"/>
New service	<input type="checkbox"/>
Capital request	<input type="checkbox"/>
Other	<input type="checkbox"/>

**Total Grant fund needs by year**

	FY17	FY18	FY19
STF project	\$	\$215,000	\$224,000

**Scalable STF Grant Request by Year**

*You are strongly encouraged to request the full amount of funding that is needed for each project, including funding for new projects; however, funding is limited. Describe the scalability of your STF funding request, how you scaled down your request and what aspects of the program would not be funded under this funding scenario below. Then enter your scaled down request amounts.*

*Scalability Description: The requested amount sustains existing service levels. Based on available capacity, WTS currently attempts to accept every out of town medical trip request it receives, providing an average of 57 trips per week. With the scaled request below, WTS would limit the total number of trip requests it accepts to 51 per week.*

	FY17	FY18	FY19	Total
Scaled request:	\$	\$204,000	\$213,000	\$417,000



**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

Identify the project's additional sources of funding in the table below:

Estimated Additional Project Resources	
Source of Funds	Dollar Amount
2017-2019 STF Program Request ( <i>Important!</i> )	\$439,000
Local Resources	\$391,000
Federal Resources	\$458,000
Other (provide description):	\$
Project Grand Total	\$1,288,000

X The award of this STF Grant will enable federal funds to be brought to the project.

**Coordinated Plan**

Is project derived from the *Cherriots Coordinated Public Transit – Human Services Transportation Plan* dated August, 2016?  Yes  No If yes, what page(s)? p.67

If no, explain why the project is not part of the Coordinated Plan.

*For example: Is the project part of another plan (please name)? Is the plan still being finalized?*

**1. Project Description**

**a.) Describe services or capital investment to be provided by STF funding.** Include a description of the following:

- Who you will serve?
- What geographic area you will serve?
- What level of service will be provided to customers?
- Operational activities; how will customers request and receive rides, including scheduling and dispatching?
- Describe if volunteers will be utilized to provide service and how this will occur (will the volunteer program be supported with STF or other funds? Will you provide mileage reimbursement to volunteers using their own vehicles?).
- How will the service be marketed?

**2017-2019 STF Grant Application  
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Woodburn Transit Service (WTS) provides transportation services to the general public, with the vast majority being seniors and persons with disabilities. Woodburn's Fixed Route and complementary paratransit programs operate within the city limits of Woodburn. The volunteer medical program transports clients to medical appointments outside of Woodburn to areas between Salem to Portland.

WTS provides a high level of service to the public through its Fixed Route, Dial-A- Ride, and Demand Response programs by ensuring that they have access to grocery, medical and other resources. WTS also provide individualized telephone and in-person trip planning assistance, which involves coordinating with services provided by other regional providers, such as CARTS, CAT and SMART. WTS regularly coordinates the transportation needs of clients from area social service agencies, such as AFS, Salud Clinic, Senior & Disability Services, etc. Transportation coordination for mobility challenged clients frequently involves trips to the home to better determine their accessibility needs and our strategies for providing services. As needed, WTS employees provide home visits to help determine the best transportation options for persons with disabilities. Employees also provide hands on assistance to help clients learn how to use the system.

Woodburn Transit partners with the Woodburn Senior Volunteer Program to provide individualized trips to out of town medical appointments anywhere between Salem and Portland. Volunteers are reimbursed for mileage when using their own vehicles to provide this medical transportation. Our recently purchased MV-1 wheelchair vehicle provides an enhanced mobility experience for disabled residents needing medically related transportation outside of Woodburn.

We market using Google Transit, webpage, email newsletters, public meeting, flyers, and signs. Schedules and brochures are available from the bus driver, City Hall, Public Library, Medical facilities, shopping mall, and grocery stores and can be mailed to clients who call and request information. The City adopted an LEP program, which provides strategies for communicating with LEP populations about the City's transit services. As Spanish is the first language for thousands of Woodburn residents, a priority is placed on communicating in both English and Spanish. Bus Schedules are printed in English and Spanish, our office clerk is fluent in Spanish, and all signs are in English and Spanish. When phone inquiries are made by non-English speakers, the transit system is fully described to the client in Spanish and assistance with trip planning is offered. The transit website can also be translated into more than 50 different languages with the click of a button.

**b.) Will your project activities preserve existing service and/or provide new service?**

*Describe how the project preserves existing service or provides new or expanded service, limit 200 words*

Woodburn will be preserving existing service with the award of this funding.

**c.) Will you coordinate between providers to avoid duplication? Describe what level of coordination between partners is done and how duplication is avoided, limit 200 words**

## 2017-2019 STF Grant Application for Projects Located Within Marion and Polk Counties

WTS coordinates with other service providers and does not duplicate services. Staff help customers plan their trips on WTS to connect with other transit entities that make stops in Woodburn (CAT, CARTS, Cascades Point). WTS employees explain how our system works and helps local residents plan their trip on the fixed route bus, the Dial-A-Ride and Out of town Volunteer Medical services.

### **d.) Is your project cost- effective?**

*Describe average cost per ride, cost per mile and cost per hour, limit 200 words*

When accounting for the fixed route, demand response, and out of town medical programs, the cost per ride is \$14.64, cost per mile is \$4.41, and cost per hour is \$61.05. These costs were calculated to include the entire program's expenses, including administrative and operations.

### **e.) Project Quality**

*Describe the **need** for this project. How was this need determined or assessed? Max 2,500 characters/approx. 400 words*

The STF program provides the single largest source of funding for Woodburn's Transit Program. The City of Woodburn is committed to adequately serving the needs of its residents, a large proportion of whom are transportation challenged. Woodburn has an exceptionally large population of minorities, seniors, and people living below the poverty line. Woodburn Transit effectively serves the needs of low income and minority populations who need access to shopping, medical, and employment service locations. Major populated areas of the city are within walking distance to a bus stop.

When inquiries are made about the bus system, a schedule and two free ride passes are mailed to the client. On board surveys are occasionally conducted and ridership input is considered when making changes to services. The public provided significant input into the development of the 2010 Transit Plan, which has guided improvements to local transit services over the past two years. In the past fiscal year, 105 new clients have applied for eligibility to use the WTS programs after staff have explained how the programs work and the cost and availability of the programs.

### **f.) Expected Outcomes**

*Describe the expected outcomes of this project on seniors and people with disabilities. Why is this project the best method to address the previously described need? Max 2,500 characters/approx. 400 words*

WTS strives to provide a clean, safe, reliable, efficient, sustainable and affordable public transportation service for people traveling within Woodburn with a focus on those who do not have other transportation options; and to strive to provide residents, visitors, and workers traveling to or from Woodburn with efficient and convenient regional connections. Woodburn offers Dial-A-Ride door to door service to enhance local mobility for seniors and persons with disabilities. These services enhance the quality of life for Woodburn residents who depend on the local transit system to access needed services.

**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

**2. Project impact on four goals of transit**

**a.) Describe the project's impact on access.**

*Access includes the ability of seniors and people with disabilities to travel to employment opportunities, community services, education, healthcare, etc., and to safely arrive at and depart their transit stop.*

Woodburn Transit takes an active role in providing customized transportation services. With features such as computerized dispatching and real time GPS vehicle tracking, the City's new AVL Tablet system enables us to provide efficient and highly customized trip coordination. We are also going to train an employee to provide travel training to Woodburn Transit clients.

As needed, WTS employees visit the homes of older adults and people with disabilities to help plan trips and determine accessibility needs and the best mode of transportation for them. If clients are unsure of how to use the fixed route or Paratransit (Dial-A-Ride), staff will offer to ride with them on a trip to help learn to maneuver the transit system. Woodburn Transit also provides individualized telephone and in-person trip planning assistance, which involves coordinating with services provided by other regional providers, such as CARTS, CAT and SMART. We regularly coordinate the transportation needs of clients from area social service agencies, such as AFS, Salud Clinic, Senior & Disability Services, etc.

**b.) Describe the project's impact on availability.**

*Availability includes spatial availability (service close to me), time availability (service when I need it), and the size of the service area.*

Woodburn Transit is available Monday thru Friday 7am- 7pm. Woodburn Transit operates within the City limits of Woodburn. STF funding will preserve the availability of service that is provided to Woodburn residents.

**c.) Describe the project's impact on connectivity.**

*Connectivity includes the integration of services (routes, schedules, fare structures, information systems, modal transfer facilities).*

Woodburn's Fixed Route service was developed to enhance its connectivity with regional transit providers, such as CAT, CARTS, and the Cascades Point. WTS regularly engages in coordination discussions with these providers to enhance the ability of riders to efficiently connect with others services. A group of providers recently began meeting to discuss the need for and ability to expand commuter services between Salem, Woodburn, Wilsonville, and the greater Portland area. Woodburn's fixed route fare is \$1.25. The Dial-A-Ride fare is \$2.50 per trip.

## 2017-2019 STF Grant Application for Projects Located Within Marion and Polk Counties

**d.) Describe this project's impact on economic development.**

*Economic development includes public transportation's contribution to providing connections for workers to employers, reducing congestion, influencing land use choice and land values, and providing employment opportunities.*

WTS provides transportation services in a manner which reduces local traffic congestion and pollution. The service enhances economic development by providing users with access to locations facilitating commerce. Employers are more likely to develop in communities with a local/ regional transit service. Additionally, ODOT and the City recently completed the Woodburn Memorial Transit Facility, which is conveniently located at the I-5 Interchange. Plans are being made to provide regional commuter service, which will utilize this facility as a park and ride location – further enhancing economic opportunities.

### 3. Project Budget

Enter all costs involved in the **total** cost of the project.

Type	Amount
Labor (payroll)	\$906,000
Contracted services	\$
Materials and supplies	\$382,000
Operations	\$
Preventive maintenance	\$
Capital equipment	\$
Technology	\$
Other (conversion price)	\$
Other (additional equipment)	\$
Other (shipping)	\$
Other (fees)	\$
<b>Project Total (right click and select "Update Field" to correct total)</b>	<b>\$1,288,000</b>
Amount requested in this grant	\$439,000.00

**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

4. Provide the timeline of the project in the following table

	<b>Step Description</b>	<b>Completion Date</b>
<b>1</b>	<b>Existing Services Begins</b>	<b>7/01/2017</b>
<b>2</b>	<b>Service Date Ends</b>	<b>6/30/2019</b>
<b>3</b>		
<b>4</b>		
<b>5</b>		
<b>6</b>		

5. Is your application for a replacement vehicle?

Yes (continue to #6)     No (go on to Section C)

6. Enter the following information about each vehicle to be replaced if the total cost of the vehicle is being requested:

<b>Vehicle Category*</b>	<b>Qty (#)</b>	<b>Cost Each (\$)</b>	<b>Total (\$)</b>	<b>No. Seats w/ADA Deployed</b>	<b>No. of ADA Stations</b>	<b>Total Capacity</b>	<b>Fuel Type*</b>	<b>Estimated Order Date</b>	<b>Estimated Delivery Date*</b>
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
<b>Totals:</b>		<b>Grand Total:</b>	<b>0</b>						

**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**


*\*Fuel Type Options: (G) Gas, (D) Diesel, (B) Biodiesel, (HG) Hybrid-gas, (HD) Hybrid-diesel, (CNG) Compressed Natural Gas, (OF) Other alternative Fuel.*

*\*Estimated Delivery Date: Minimum 160 days if ADA accessible.*

**C. ORGANIZATIONAL CERTIFICATION**

By submitting this document via email to Cherriots, I certify that the submitted materials and data included are complete, true and correct. Also, I certify that my organization is:

- Eligible to enter into agreements with Cherriots;
- Has the legal, managerial and operational capacity to do the work to be paid for by the STF;
- Not debarred or suspended from federal grants;
- In compliance with federal, state and local laws and regulations including, and not limited to, those pertaining to passenger transportation, civil rights, labor, insurance, safety and health, as applicable;
- Complies with the laws or rules of the STF Program;
- Properly uses and accounts for the STF; and
- Will operate the project or service in a safe, prudent and timely manner.

	<i>Assistant City Administrator</i>	<i>1/27/17</i>
Signature of Authorized Organization Officer	Title	Date

**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

**Private Nonprofit Agency – Corporation Status Inquiry and Certification**

If your agency or organization is claiming eligibility as a Section 5310 or STF Program applicant based on its status as a private nonprofit organization, you must obtain verification of its incorporation number and current legal standing from the Oregon Secretary of State Information Retrieval/ Certification & Records Unit (IRC Unit). The "Status Inquiry" document must be attached as an appendix to the application. To assist your agency or organization in obtaining this information, use one of these two methods:

To obtain Corporate Records Information over the Internet, go to:  
<http://sos.oregon.gov/business/Pages/find.aspx> Enter the name of your agency or organization. If its status is active, print the page and submit it as proof.


**Private Non-profits**

Legal Name of Non-profit Applicant:

State of Oregon Articles of Incorporation Number:

Date of Incorporation:

**Certifying Representative**

Name (print): Kathleen McClaskey	
Title (print): Transit Manager	
Signature: 	Date: 1/30/2017



**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

**RACIAL AND ETHNIC IMPACT STATEMENT**

**This form is used for informational purposes only and must be included with the grant application.**

Chapter 600 of the 2013 Oregon Laws require applicants to include with each grant application a racial and ethnic impact statement. The statement provides information as to the disproportionate or unique impact the proposed policies or programs may have on minority persons in the State of Oregon if the grant is awarded to a corporation or other legal entity other than natural persons.

1. The proposed grant project policies or programs could have a disproportionate or unique positive impact on the following minority persons:

Indicate all that apply:

- Women
- Persons with Disabilities
- African-Americans
- Hispanics
- Asians or Pacific Islanders
- American Indians
- Alaskan Natives

2. The proposed grant project policies or programs could have a disproportionate or unique negative impact on the following minority persons:

Indicate all that apply:

- Women
- Persons with Disabilities
- African-Americans
- Hispanics
- Asians or Pacific Islanders
- American Indians
- Alaskan Natives

3. The proposed grant project policies or programs will have no disproportionate or unique impact on minority persons.

If you checked numbers 1 or 2 above, on a separate sheet of paper, provide the rationale for the existence of policies or programs having a disproportionate or unique impact on minority persons in this state. Further provide evidence of consultation with representative(s) of the affected minority persons.

I HEREBY CERTIFY on this 27 day of January, 2017, the information contained on this form and any attachment is complete and accurate to the best of my knowledge.

Signature: 

Printed Name: Kathleen McClaskey

Title: Transit Manager

1 "Minority persons" are defined in SB 463 (2013 Regular Session) as women, persons with disabilities (as defined in ORS 174.107), African-Americans, Hispanics, Asians or Pacific islanders, American Indians, and Alaskan Natives.

# REQUEST FOR TRANSIT VEHICLE PRICE QUOTE (RFQ)

This is (check one):

- Initial Request for Quote (from Requesting Agency to Vendors)  
Due Date: \_1/30/17
- Response to RFQ (from Responding Vendor back to Requesting Agency)

---

**VENDOR (Business Name):** Creative Bus Sales

**Vendor Contact Person:** Kimberly Stanchfield      **Phone:** 844-993-5989 x 327

**Email:** kimberly.stanchfield@creativebussales.com      **Alt Phone:** 503-709-9665

---

## REQUESTING AGENCY INFORMATION

**Agency:** Woodburn Transit      **Date:** \_\_\_\_\_

**Contact Person:** Kathleen McClaskey      **Phone:** 503-982-5245

**Email Address:** Kathleen.mcclaskey@ci.woodburn.or.us      **Fax:** \_\_\_\_\_

**Agency Address:** 202 Young St Woodburn, OR 97071

The above Agency, through its Public Transit program or public transit affiliate, is requesting price quotes from Oregon State Price Agreement Contract Vendors for the purchase of the following vehicle(s):

**From (circle):** Oregon State Price Agreement / Other      **No. of Vehicles Required:** 2

**PTD Vehicle Category (Check):** (Please see *PTD Vehicle Descriptions and Useful Life Standards*)

Cat A     Cat B     Cat C     Cat D     Cat E-1 (select from 1 to 3)

**Length (can be range):** @ 22ft      **Regular Seats:** 7      **ADA Stations/Tiedowns:** 2

**Fuel Type:**  Gasoline     Diesel     Bio-fuel     Hybrid     CNG     Propane

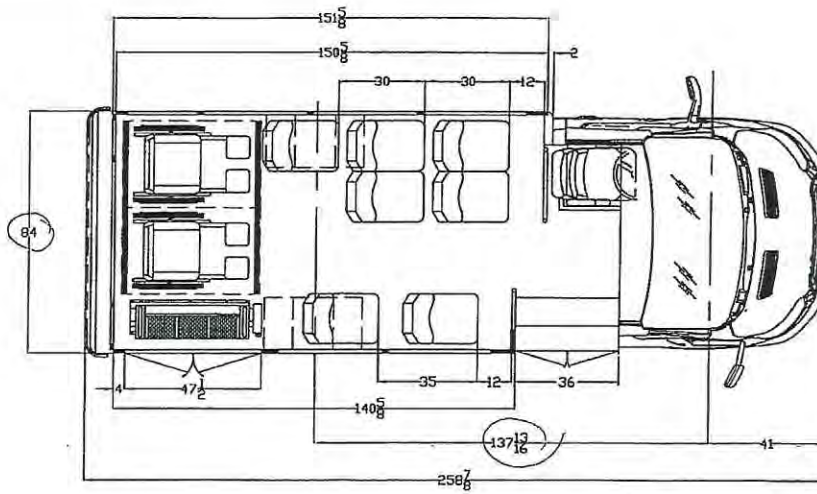
High Floor     Low Floor    **Other Comment:** \_\_\_\_\_

The general specification for vehicle is as follows:

<b>A. VENDOR'S VEHICLE BASE PRICE INFORMATION</b>		<b>VEHICLE BASE PRICE</b>
<i>This Section to be completed by Vendor</i>		<i>Enter base price from State Price Agreement below</i>
Vehicle Make/Model: Starcraft Starlite Transit on T350 Chassis		\$50,389
Length: 21' 5"		
Fuel Type: Gasoline		
Floor: <input checked="" type="checkbox"/> High Floor <input type="checkbox"/> Low Floor Other:		
No. of Regular Passenger Seats: 7		
No. of ADA Stations w/Tiedowns Desired: 2		
Other Special Note:		
<b>B. VEHICLE REQUIRED SPECIFICATIONS</b>		
<i>Requesting Agency completes Option Description column</i>	<b>VENDOR RESPONSE</b>	
<i>Vendor completes "Vendor Response" columns</i>		
<b>Requesting Agency's Required Specifications Description</b>	<b>Included in Base Price?  YES / NO</b>	<b>\$Additional Cost for Option\$  (or Note Not Available)</b>
Gas Light Duty Chassis with Auto Trans, GVWR 10,360 max	Yes	Ford Transit
Overall length 22' – 25'; Rear Wheel Drive	Yes	21' 5" Provided 138" w/b - see floorplan below
Driver side running board	No	\$265 Heavy duty aluminum anti- slip
Front and rear mud flaps	Yes	
Interior mirror to view passengers	Yes	6 x 16
Solid or T Windows with egress window lights (red )	Yes	
Rubber Flooring	Yes	
<ul style="list-style-type: none"> <li>• All Exterior Lights LED</li> <li>• All Interior lights LED</li> <li>• Center mounted Brake Light LED</li> </ul>	Yes	
Back up alarm	Yes	
OEM front and rear bumpers	Yes	

Fuel tank access panel	No	Not available on Transit due to crossmembers
OEM spring suspension	Yes	
AM/FM/CD with 4 Speakers	Yes	
7 Vinyl Freedman Featherweight or approved equal; mid high fixed seats with 2 wheelchair positions. Aisle side grab handles.	Yes	
<ul style="list-style-type: none"> <li>Stanchion and Modesty Panel</li> </ul>	Yes	
Full DOT Safety Kit and body fluid kit, fire ext. and belt cutter	Yes	
Passenger air conditioning	Yes	45K BTU
Passenger heater with In-Line Pump	Yes	
<ul style="list-style-type: none"> <li>36" Electric Passenger entry door with assist handles on each door for adults and children</li> </ul> Power Wheel Chair Lift 800# ) mounted in passenger side rear double door with park interlock and door ajar light (403/404 compliant)	Yes	
<b>Subtotal Cost of Required Options:</b>		\$50,389
<b>C. VEHICLE PREFERRED OPTIONS</b>		
<b>Requesting Agency's Preferred Options Description</b>	<b>Included in Base Price? YES / NO</b>	<b>\$Additional Cost for Option\$ (or Note Not Available)</b>
Rear Window (No door)	Yes	





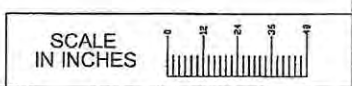
42795-42814B

NOTE: SHOWN WITH MID HI FREEDMAN SEATS  
 TRANSIT 10,360 GVWR  
 THIS FLOOR PLAN IS FOR ILLUSTRATION PURPOSES ONLY.  
 A WEIGHT ANALYSIS HAS NOT YET BEEN PERFORMED.  
 FINAL APPROVAL WITH A WEIGHT ANALYSIS IS REQUIRED UPON  
 RECEIPT OF A COMPLETED ORDER WITH ALL OPTIONS SHOWN.  
 OPTIONAL EQUIPMENT MAY BE SHOWN.  
 THE SALES ORDER PLACED DICTATES ACTUAL OPTION CONTENT.

DEALER APPROVAL

APPROVED

CUSTOMER SIGNATURE

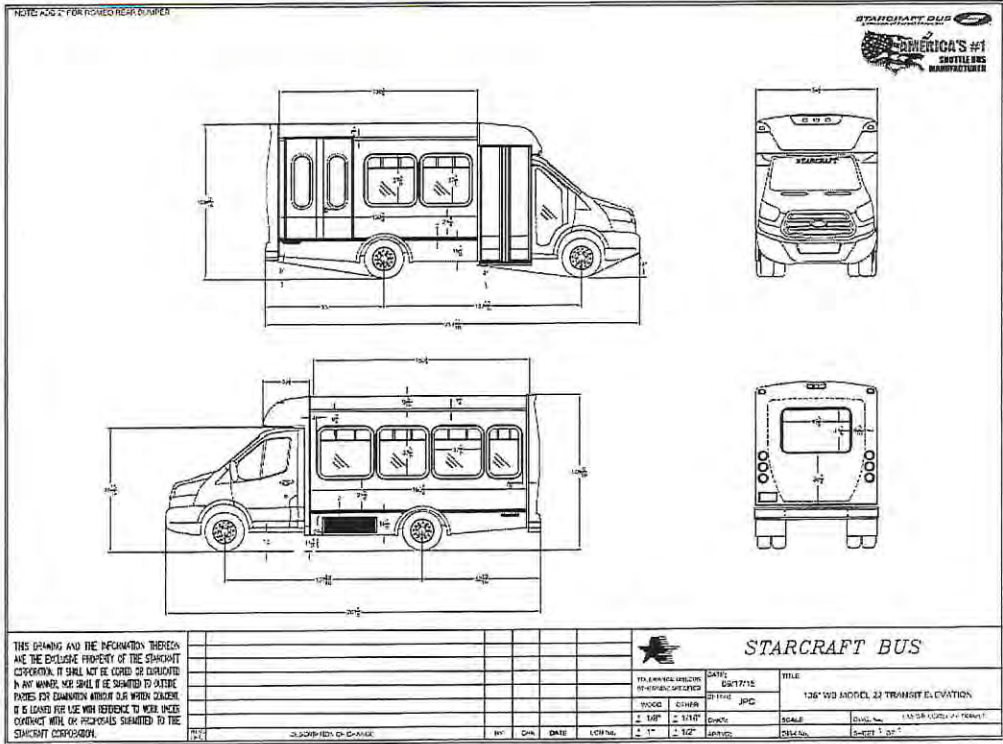


THIS DRAWING AND THE INFORMATION THEREON ARE THE EXCLUSIVE PROPERTY OF STARCRAFT BUS, A DIVISION OF FOREST RIVER. IT SHALL NOT BE COPIED OR DUPLICATED IN ANY MANNER, NOR SHALL IT BE SUBMITTED TO OUTSIDE PARTIES FOR EXAMINATION WITHOUT OUR WRITTEN CONSENT. IT IS LOANED FOR USE WITH REFERENCE TO WORK UNDER CONTRACT WITH, OR PROPOSALS SUBMITTED

REV	DESCRIPTION OF CHANGE	BY	CHK	DATE	ECN No.

TOLERANCE UNLESS OTHERWISE SPECIFIED	STARCRAFT BUS A Division of Forest River, Inc.		
WOOD	OTHER	DATE: 4/01/13	TITLE: 7 2 VC 138 VS 22' TRANSIT
± 1/8"	± 1/16"	NAME, LHM	DWG. No. 7 2 VC 138 150 USA

5490-54909  
 60675-06885



**VENDOR INFORMATION**

Vendors are strongly encouraged to submit price quotes using the format provided. Vendors should specifically note if and how they meet the above specifications, and note any differences in what has been called out above, in their price quotes. This may be done on the form, or on an attached sheet. The vehicle(s) will be purchased with funding from the Oregon Department of Transportation, Public Transit Division and the Requesting Agency, and will follow applicable Federal and State procurement guidelines.

**Price Quote shall be submitted to the Requesting Agency contact person named on the first page on this form.**

**Price Quotes may be sent by U.S. Mail, emailed, or faxed to the addresses for Requesting Agency noted on page 1 of this form.**

**VEHICLE SELECTION INFORMATION**

Selection of the vehicle and successful price quote will be based on:

- Lowest Cost With Required Specifications
- Best Value Determination (ODOT PTD pre-approval required.)

**The Best Value Determination criteria are as follows:**

- **Meeting all required specifications – Pass or Fail**
- **Meeting all optional specifications – 30 points**
- **After Delivery Warranty – 20 points**
- **Delivery Date and Location – Pass or Fail**



**2017-2019 Special Transportation  
Fund (STF) Grant Application  
for Projects Located Within Marion and  
Polk Counties**



**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

**INTRODUCTION**

- Read page 4 of the *Special Transportation Fund Instructions* for project and agency eligibility. The instructions are available on the ODOT Rail and Public Transit website: (<http://www.oregon.gov/ODOT/PT/Pages/news.aspx>).
- Use the instructions as a reference while filling out the application form.
- Each project submitted for funding consideration must have its own application.
- Selection criteria are detailed in Section 5 of the *Application Instructions*.
- This form must be filled out using Microsoft Word and submitted as a Word or Adobe .pdf document. Paper applications will NOT be accepted.
- Signature pages should be scanned and attached as separate pages to each application.

**Submittal Checklist**

***Make sure***

- ✓ Application is complete, signed, and dated

***Submit***

- ✓ Proof of agency status (template included in application packet)
- ✓ Ethnic and Racial Impact Statement
- ✓ Maintenance Plan (if submitting an application for preventive maintenance)

**A. ORGANIZATION INFORMATION**

**Name of Organization: City of Woodburn**

**Contact Person: Kathleen McClaskey**

**Address: 270 Montgomery St. Woodburn, Oregon 97071**

**Telephone: (503) 982-5245**

**Email: [Kathleen.mcclaskey@ci.woodburn.or.us](mailto:Kathleen.mcclaskey@ci.woodburn.or.us)**

**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

**Type of Organization (check one)**

Government Agency	X
Private Not-for-Profit	<input type="checkbox"/>
Other	<input type="checkbox"/>

**Area of service (check one)**

Inside Marion and Polk Counties	X
Outside Marion and Polk Counties	<input type="checkbox"/>
Both inside and outside Marion and Polk Counties	<input type="checkbox"/>

**Organization Days and Hours of Operation**

Day	Hours
Sunday	
Monday	7:00 AM – 7:00 PM
Tuesday	7:00 AM – 7:00 PM
Wednesday	7:00 AM – 7:00 PM
Thursday	7:00 AM – 7:00 PM
Friday	7:00 AM – 7:00 PM
Saturday	
Please list any planned periods of service closure greater than 3 days (i.e., closed the week between Christmas Day and New Year's Day)	

**Total transportation program costs by year**

FY16 (historical data, if applicable)	FY17 (projected, if applicable)	FY18 (projected)	FY19 (projected)
\$641,806	\$677,044	\$693,407	\$720,949

**B. PROJECT INFORMATION**

**Project Title** (will be used for reviewer reference and in public comment process. Example: *Mobility Management for The Confederated Tribes of Grand Ronde*)

Woodburn Vehicle Replacement
------------------------------

**Project service area to be served** (indicate the geographic features that define your service area such as streets, rivers, or jurisdictional boundaries)

North boundary	Woodburn City Limits
West boundary	Woodburn City Limits
South boundary	Woodburn City Limits
East boundary	Woodburn City Limits
Other general geographic area (i.e., within the City of Woodburn)	Within the Woodburn City Limits

*Optional: please provide a map of your service area as a separate single page 8.5"x11"*

**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

attachment.

**Total STF funds requested**

\$37,489
----------

**Start date**

July 1, 2017
--------------

**Funding request type (check one)**

Continuation of existing service at same level of service	<input type="checkbox"/>
Expansion of existing service	<input type="checkbox"/>
New service	<input type="checkbox"/>
Capital request	<input checked="" type="checkbox"/>
Other	<input type="checkbox"/>

**Total Grant fund needs by year**

	FY17	FY18	FY19
STF project	\$	\$37,489	\$

**Scalable STF Grant Request by Year**

*You are strongly encouraged to request the full amount of funding that is needed for each project, including funding for new projects; however, funding is limited. Describe the scalability of your STF funding request, how you scaled down your request and what aspects of the program would not be funded under this funding scenario below. Then enter your scaled down request amounts.*

<i>Scalability Description: If funding were reduced by 5%, Woodburn would work to identify additional local match, in order to purchase the replacement vehicle.</i>
--

	FY17	FY18	FY19	Total
Scaled request:	\$	\$35,615	\$	\$

**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

Identify the project's additional sources of funding in the table below:

<b>Estimated Additional Project Resources</b>	
<b>Source of Funds</b>	<b>Dollar Amount</b>
2017-2019 STF Program Request ( <i>Important!</i> )	\$37,489
Local Resources	\$
Federal Resources	\$
Other (provide description): Insurance Proceeds	\$14,900
<b>Project Grand Total</b>	<b>\$52,389</b>

X The award of this STF Grant will enable federal funds to be brought to the project.

**Coordinated Plan**

Is project derived from the *Cherriots Coordinated Public Transit – Human Services Transportation Plan* dated August, 2016?  Yes  No If yes, what page(s)? p.67

If no, explain why the project is not part of the Coordinated Plan.

*For example: Is the project part of another plan (please name)? Is the plan still being finalized?*

**1. Project Description**

a.) **Describe services or capital investment to be provided by STF funding.** Include a description of the following:

- Who you will serve?
- What geographic area you will serve?
- What level of service will be provided to customers?
- Operational activities; how will customers request and receive rides, including scheduling and dispatching?
- Describe if volunteers will be utilized to provide service and how this will occur (will the volunteer program be supported with STF or other funds? Will you provide mileage reimbursement to volunteers using their own vehicles?).
- How will the service be marketed?

**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

Woodburn Transit Service (WTS) is requesting funding assistance to replace an E450 Cut-A-Way vehicle that was totaled in an accident in December 2016. The vehicle had 85,000 miles and was beyond its useful life in terms of age. The vehicle was due for replacement even prior to the accident. The insurance proceeds of \$14,900 will allow WTS to provide a 28% match toward the replacement of the vehicle.

The proposed replacement vehicle is a 2017 Starcraft Starlite 22, which has a 3.7L gasoline engine and is built on a Ford Transit 350 Chassis. The vehicle has seating for seven, with two wheelchair stations, and a lift. The camera system, bike rack, and fare box were removed from the damaged vehicle and will be reinstalled in the replacement van.

**b.) Will your project activities preserve existing service and/or provide new service?**

*Describe how the project preserves existing service or provides new or expanded service, limit 200 words*

This funding will provide for the replacement of a cut-a-way vehicle that was totaled in an accident.

**c.) Will you coordinate between providers to avoid duplication? Describe what level of coordination between partners is done and how duplication is avoided, limit 200 words**

WTS coordinates with other service providers and does not duplicate services. Staff help customers plan their trips on WTS to connect with other transit entities that make stops in Woodburn (CAT, CARTS, Cascades Point). WTS employees explain how our system works and helps local residents plan their trip on the fixed route bus, the Dial-A-Ride and Out of town Volunteer Medical services.

**d.) Is your project cost- effective?**

*Describe average cost per ride, cost per mile and cost per hour, limit 200 words*

By purchasing a vehicle that is on the state price agreement, this purchase is cost effective.

**e.) Project Quality**

*Describe the **need** for this project. How was this need determined or assessed? Max 2,500 characters/approx. 400 words*

**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

This grant will replace a vehicle that was deemed totaled by our insurance company. The replacement vehicle will ensure that we have the capacity to maintain the level of service that we currently provide to seniors and persons with disabilities. This vehicle is a critical piece of our para-transit program.

**f.) Expected Outcomes**

*Describe the expected outcomes of this project on seniors and people with disabilities. Why is this project the best method to address the previously described need? Max 2,500 characters/approx. 400 words*

Woodburn offers Dial-A-Ride door to door service to enhance local mobility for seniors and persons with disabilities.

**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

**2. Project impact on four goals of transit**

**a.) Describe the project's impact on access.**

*Access includes the ability of seniors and people with disabilities to travel to employment opportunities, community services, education, healthcare, etc., and to safely arrive at and depart their transit stop.*

This vehicle is specifically assigned to the City's complementary paratransit services, which provides transportation to seniors and people with disabilities.

Woodburn Transit takes an active role in providing customized transportation services. With features such as computerized dispatching and real time GPS vehicle tracking, the City's new AVL Tablet system enables us to provide efficient and highly customized trip coordination. We are also going to train an employee to provide travel training to Woodburn Transit clients.

As needed, WTS employees visit the homes of older adults and people with disabilities to help plan trips and determine accessibility needs and the best mode of transportation for them. If clients are unsure of how to use the fixed route or Paratransit (Dial-A-Ride), staff will offer to ride with them on a trip to help learn to maneuver the transit system. Woodburn Transit also provides individualized telephone and in-person trip planning assistance, which involves coordinating with services provided by other regional providers, such as CARTS, CAT and SMART. We regularly coordinate the transportation needs of clients from area social service agencies, such as AFS, Salud Clinic, Senior & Disability Services, etc.

**b.) Describe the project's impact on availability.**

*Availability includes spatial availability (service close to me), time availability (service when I need it), and the size of the service area.*

Woodburn Transit is available Monday thru Friday 7am- 7pm. Woodburn Transit operates within the City limits of Woodburn. This vehicle will provide door to door complementary para-transit service to Woodburn seniors and persons with disabilities.

**c.) Describe the project's impact on connectivity.**

*Connectivity includes the integration of services (routes, schedules, fare structures, information systems, modal transfer facilities).*



## 2017-2019 STF Grant Application for Projects Located Within Marion and Polk Counties

This vehicle may occasionally fill in on Woodburn's fixed route service. Woodburn's Fixed Route service was developed to enhance its connectivity with regional transit providers, such as CAT, CARTS, and the Cascades Point. WTS regularly engages in coordination discussions with these providers to enhance the ability of riders to efficiently connect with others services. A group of providers recently began meeting to discuss the need for and ability to expand commuter services between Salem, Woodburn, Wilsonville, and the greater Portland area. Woodburn's fixed route fare is \$1.25. The Dial-A-Ride fare is \$2.50 per trip.

**d.) Describe this project's impact on economic development.**

*Economic development includes public transportation's contribution to providing connections for workers to employers, reducing congestion, influencing land use choice and land values, and providing employment opportunities.*

WTS provides transportation services in a manner which reduces local traffic congestion and pollution. The service enhances economic development by providing users with access to locations facilitating commerce. Employers are more likely to develop in communities with a local/ regional transit service. Additionally, ODOT and the City recently completed the Woodburn Memorial Transit Facility, which is conveniently located at the I-5 Interchange. Plans are being made to provide regional commuter service, which will utilize this facility as a park and ride location – further enhancing economic opportunities.

**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

**3. Project Budget**

Enter all costs involved in the **total** cost of the project.

Type	Amount
Labor (payroll)	\$
Contracted services	\$
Materials and supplies	\$
Operations	\$
Preventive maintenance	\$
Capital equipment	\$50,389
Technology	\$
Other (conversion price)	\$
Other (install existing equipment, graphics)	\$2,000
Other (shipping)	\$
Other (fees)	\$
<b>Project Total (right click and select "Update Field" to correct total)</b>	<b>\$52,389</b>
Amount requested in this grant	\$37,489

**4. Provide the timeline of the project in the following table**

	Step Description	Completion Date
1	Order vehicle	7/1/2017
2	Vehicle placed in service	12/31/2016
3		
4		
5		
6		

**5. Is your application for a replacement vehicle?**

X Yes (continue to #6)     No (go on to Section C)

**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

**6. Enter the following information about each vehicle to be replaced if the total cost of the vehicle is being requested:**

<b>Vehicle Category*</b>	<b>Qty (#)</b>	<b>Cost Each (\$)</b>	<b>Total (\$)</b>	<b>No. Seats w/ADA Deployed</b>	<b>No. of ADA Stations</b>	<b>Total Capacity</b>	<b>Fuel Type*</b>	<b>Estimated Order Date</b>	<b>Estimated Delivery Date*</b>
E-1	1	52,389		11	2	13	G	July 1, 2017	Dec 31, 2017
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
<b>Totals:</b>		<b>Grand Total:</b>	<b>0</b>						

**\*Vehicle Category Descriptions:** <http://www.oregon.gov/ODOT/PT/resources/guidance-library/vehicle-descriptions-usefullife-standards.pdf>

**\*Fuel Type Options:** (G) Gas, (D) Diesel, (B) Biodiesel, (HG) Hybrid-gas, (HD) Hybrid-diesel, (CNG) Compressed Natural Gas, (OF) Other alternative Fuel.

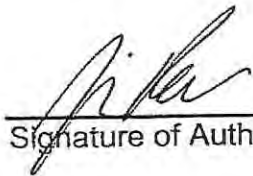
**\*Estimated Delivery Date:** Minimum 160 days if ADA accessible.

**2017-2019 Section 5310(ODOT) Grant Application  
for Projects Located Within Marion and Polk Counties**

**C. ORGANIZATIONAL CERTIFICATION**

By submitting this document via email to Cherriots, I certify that the submitted materials and data included are complete, true and correct. Also, I certify that my organization is:

- Eligible to enter into agreements with Cherriots;
- Has the legal, managerial and operational capacity to do the work to be paid for by the Section 5310 Program;
- Not debarred or suspended from federal grants;
- In compliance with federal, state and local laws and regulations including, and not limited to, those pertaining to passenger transportation, civil rights, labor, insurance, safety and health, as applicable;
- Complies with the laws or rules of the Section 5310 Program;
- Properly uses and accounts for the Section 5310 Program's goals; and
- Will operate the project or service in a safe, prudent and timely manner.



Signature of Authorized Organization Officer

*Assistant City Administrator* 1/27/17

Title

Date

**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

**Private Nonprofit Agency – Corporation Status Inquiry and Certification**

If your agency or organization is claiming eligibility as a Section 5310 or STF Program applicant based on its status as a private nonprofit organization, you must obtain verification of its incorporation number and current legal standing from the Oregon Secretary of State Information Retrieval/ Certification & Records Unit (IRC Unit). The "Status Inquiry" document must be attached as an appendix to the application. To assist your agency or organization in obtaining this information, use one of these two methods:

To obtain Corporate Records Information over the Internet, go to:  
<http://sos.oregon.gov/business/Pages/find.aspx> Enter the name of your agency or organization. If its status is active, print the page and submit it as proof.


**Private Non-profits**

Legal Name of Non-profit Applicant:

State of Oregon Articles of Incorporation Number:

Date of Incorporation:

**Certifying Representative**

Name (print): Kathleen McClaskey	
Title (print): Transit Manager	
Signature: 	Date: 1/30/2017

**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

**RACIAL AND ETHNIC IMPACT STATEMENT**

**This form is used for informational purposes only and must be included with the grant application.**

Chapter 600 of the 2013 Oregon Laws require applicants to include with each grant application a racial and ethnic impact statement. The statement provides information as to the disproportionate or unique impact the proposed policies or programs may have on minority persons in the State of Oregon if the grant is awarded to a corporation or other legal entity other than natural persons.

1. The proposed grant project policies or programs could have a disproportionate or unique positive impact on the following minority persons:

Indicate all that apply:

- Women
- Persons with Disabilities
- African-Americans
- Hispanics
- Asians or Pacific Islanders
- American Indians
- Alaskan Natives

2. The proposed grant project policies or programs could have a disproportionate or unique negative impact on the following minority persons:


Indicate all that apply:

- Women
- Persons with Disabilities
- African-Americans
- Hispanics
- Asians or Pacific Islanders
- American Indians
- Alaskan Natives

3. The proposed grant project policies or programs will have no disproportionate or unique impact on minority persons.

If you checked numbers 1 or 2 above, on a separate sheet of paper, provide the rationale for the existence of policies or programs having a disproportionate or unique impact on minority persons in this state. Further provide evidence of consultation with representative(s) of the affected minority persons.

I HEREBY CERTIFY on this 30 day of January, 2017, the information contained on this form and any attachment is complete and accurate to the best of my knowledge.

Signature: 

Printed Name: Kathleen McClaskey  
Title Transit Manager

1 "Minority persons" are defined in SB 463 (2013 Regular Session) as women, persons with disabilities (as defined in ORS 174.107), African-Americans, Hispanics, Asians or Pacific islanders, American Indians, and Alaskan Natives.

**2017 Section 5310(FTA)  
Grant Application  
for Projects Located Within the  
Salem-Keizer Urban Growth Boundary**

Mobility Management



## INTRODUCTION

- Read the *2017 Section 5310(FTA)Grant Application Instructions* prior to completing this application.
- Each project submitted for funding consideration must have its own application.
- Selection criteria are detailed in the *Application Instructions*.
- This form must be filled out using Microsoft Word and submitted as a Word or Adobe .pdf document. Paper applications will NOT be accepted.
- Signature pages should be scanned and attached as separate pages to each application.

### Submittal Checklist

#### ***Make sure***

- ✓ Application is complete, signed, and dated

#### ***Submit***

- ✓ Proof of agency status (template included in application packet)
- ✓ Ethnic and Racial Impact Statement
- ✓ Maintenance Plan (if submitting an application for preventive maintenance)

## A. ORGANIZATION INFORMATION

**Name of Organization:** Cherriots

**Contact Person:** Trisha Bunsen

**Address:** 555 Court St NE, Suite 5230, Salem, OR 97301

**Telephone:** 503-588-2424

**Email:** trisha.bunsen@cherriots.org



**Type of Organization (check one)**

Government Agency	<input type="checkbox"/>
Private Not-for-Profit	<input type="checkbox"/>
Other Public Transit District	<input checked="" type="checkbox"/>

**Area of service (check one)**

Inside Marion and Polk Counties	<input type="checkbox"/>
Outside Marion and Polk Counties	<input type="checkbox"/>
Both inside and outside Marion and Polk Counties	<input checked="" type="checkbox"/>

**Organization Days and Hours of Operation**

Day	Hours
Sunday	N/A
Monday	5:00 am-12:20 am
Tuesday	5:00 am-12:20 am
Wednesday	5:00 am-12:20 am
Thursday	5:00 am-12:20 am
Friday	5:00 am-12:20 am
Saturday	10:00am –4:00pm call center only
Please list any planned periods of service closure greater than 3 days (i.e., closed the week between Christmas Day and New Year’s Day)	

**Total transportation program costs by year**

FY16 (historical data, if applicable) 38,878,585	FY17 (projected, if applicable) 42,178,000	FY18 \$45,974,020
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**B. PROJECT INFORMATION**

**Project Title** (will be used for reviewer reference and in public comment process. Example: *Mobility Management for XYZ volunteer driver program*)

Mobility Management Call Center and Partnership Coordination
--

**Project service area to be served** (indicate the geographic features that define your service area such as streets, rivers, or jurisdictional boundaries)

North boundary	(see below)
West boundary	(see below)
South boundary	(see below)
East boundary	(see below)
Other general geographic area (i.e., within the City of Woodburn)	Within Marion and Polk Counties

*Optional:* please provide a map of your service area as a separate single page 8.5”x11”

attachment.

**Total Section 5310 funds requested**

\$110,722

**Start date**

July 1, 2017

**Funding request type (check one)**

Continuation of existing service at same level of service	<input checked="" type="checkbox"/>
Expansion of existing service	<input type="checkbox"/>
New service	<input type="checkbox"/>
Capital request	<input type="checkbox"/>
Other	<input type="checkbox"/>

**Scalable Section 5310 Grant Request**

*You are strongly encouraged to request the full amount of funding that is needed for each project, including funding for new projects; however, funding is limited. Describe the scalability of your STF funding request, how you scaled down your request and what aspects of the program would not be funded under this funding scenario below. Then enter your scaled down request amounts.*

*Scalability Description: Scalability of this work would be difficult without utilizing general fund dollars, which have not been budgeted for this work. Therefore, Cherriots is requesting the full amount only.*

	FFY18
Scaled request:	\$110,722

**Identify the project's additional sources of funding in the table below**

Estimated Additional Project Resources	
Source of Funds	Dollar Amount
2017 Section 5310 Grant Request ( <i>Important!</i> )	\$110,722
Local Resources	
Federal Resources 5307 Cherriots Call Center	\$24,528
Other (provide description): STF match	\$33,813
Project Grand Total	\$169,063

The award of this Section 5310 Grant will enable federal funds to be brought to the project.

## Coordinated Plan

Is project derived from the Cherriots *Coordinated Public Transit – Human Services Transportation Plan* dated August, 2016?  Yes  No If yes, what page?

p. 68

If no, explain why the project is not part of the Coordinated Plan.

*For example: Is the project part of another plan (please name)? Is the plan still being finalized?*

### 1. Project Description

#### a.) Describe services or capital investment to be provided by Section 5310 funding.

Include a description of the following:

- Who you will serve?
- What geographic area you will serve?
- What level of service will be provided to customers?
- Operational activities; how will customers request and receive rides, including scheduling and dispatching?
- Describe if volunteers will be utilized to provide service and how this will occur (will the volunteer program be supported with STF or other funds? Will you provide mileage reimbursement to volunteers using their own vehicles?).
- How will the service be marketed?

This project will fund a portion of mobility management costs benefitting seniors and people with disabilities in Marion and Polk Counties. The project will focus on the coordination of partners, support of state and local coordination policy bodies and councils, and the operation of the Cherriots Call Center formerly known as TripLink Call Center to provide transportation services for clients residing in the two counties.

The goals/objectives of the project are to:

1. Improve coordination by establishing partnerships to coordinate transportation projects, planning, service and expertise;
2. Coordinate service delivery to eliminate duplication;
3. Close transportation gaps by offering service in areas that may not be currently served by a local transit provider;
4. Leverage limited funding and resources through partnerships;
5. Educate transit agency staff and customers on the availability of transportation options in the region. These include services that operate outside of the fixed-route, paratransit, and demand responsive services provided inside the urban growth boundary including CARTS and our rural providers which serve seniors, individuals with disabilities, low income persons, and the general public in Marion and Polk Counties.
6. Improve the Customer Service Representative (C.S.R.) script in the Cherriots call center to educate customers on the RED Line services understanding.
7. Improve RED Line marketing through social media channels; the web; targeted geographic location mailers; advertisements in local newspapers, and the promotion of the RED Line transportation service at informational tables and community presentation opportunities.

The Mobility Management project includes the activities of the Cherriots Call Center and the partnership coordination staff person. Both work to ensure that all public transportation services in Marion and Polk Counties work together and are not duplicated. This includes all services identified in the currently adopted Coordinated Public Transit – Human Services Transportation Plan. The Call Center assists clients with booking of trips on CARTS, CherryLift, and RED Line and makes sure regional services are not duplicated. For example, CARTS deviations are not booked in cities where public transit services exist such as in Woodburn and Silverton. Customers requesting deviations in these cities are referred to the local transit system website or telephone numbers so that appropriate connections can be made.

**c.) Will you coordinate between providers to avoid duplication? Describe what level of coordination between partners is done and how duplication is avoided, limit 200 words**

Mobility Management by definition is inclusive of regional partners. One of the goals of the project is assistance in coordinating projects such that duplication is avoided. This is done primarily by the Cherriots Call Center when they assist customers with booking trips inside and outside the Salem-Keizer urban growth boundary. The Cherriots Call Center also coordinates services throughout the region by referring customers to other providers and public transportation outside the CHERRIOTS service area.

The Partnership Coordination position works to educate providers and potential providers on funding availability and how to coordinate work in order to avoid duplication of services within the region.

**d.) Is your project cost-effective?**

*Describe average cost per ride, cost per mile and cost per hour, limit 200 words*

Performance measures have been created for the partnership and call center project. The partnership and call center manager evaluates performance measures on a quarterly and annual basis. Measures are adjusted for quality and cost effectiveness.

The Cherriots Call Center is a central clearinghouse for public transportation services within Marion and Polk Counties by booking requested trips on RED Line, CherryLift, and CARTS. The ability to book requested trips at one centralized location allows for easy coordination of services between providers, therefore eliminating duplication of services and provides a cost savings.

Cost effectiveness of the Partnership Coordination project can be measured in productivity of existing services being offered through the Section 5310, 5311, and Special Transportation Fund (STF) grant programs. The currently-funded programs in Marion and Polk Counties are: CARTS, CherryLift, RED Line, a part-time coordinator for the West Valley Hospital Connections Van, vehicles for the Part of the goal of mobility management is to provide options for transportation and defray costs to the higher cost per ride ADA Paratransit service.

Silverton Hospital CareVan and Catholic Community Services programs, operations costs for the Silverton Silver Trolley, and operations and preventative maintenance of the Woodburn Transit System buses.

**e.) Project Quality**

*Describe the **need** for this project. How was this need determined or assessed? Max 2,500 characters/approx. 400 words*

The Cherriots Call Center is a one-stop shop for citizens to call for regional transportation including scheduling, inquiring about options, and booking rides. The Cherriots Call Center is essential for providing the resources to citizens who have little information about public transportation in Marion and Polk Counties.

Partner coordination is essential on a regional level in order to provide public transit services that are useful and cost effective. One example is the promotion of the STF program for use in the volunteer driver program at West Valley Hospital in Dallas. Without the work done by the STF Coordinator to educate the Salem Health Grants Administrator on the availability of funds to stabilize their volunteer driver base, hospital staff would still be filling gaps in their driver schedules. This is an inexpensive way to provide mobility to seniors and individuals with disabilities in Polk County who do not have other means to get to the hospital.

**f.) Expected Outcomes**

*Describe the expected outcomes of this project on seniors and people with disabilities. Why is this project the best method to address the previously described need? Max 2,500 characters/approx. 400 words*

The following performance measures define the success of the project:

- An increase in the amount of ridership on existing services funded through 5310, 5311, and STF grant programs;
- An increase in the productivity of existing services, measured in riders per revenue hour of service provided;
- An increase in the number of stakeholders involved in regional coordination planning;
- An increase in the number of outreach events provided to engage stakeholders, our riders, and the general public;
- An increase in the number of Purchase of Service (POS) agreements;
- Net increase in numbers of people throughout Marion and Polk Counties who have access to jobs, school, medical facilities, shopping, and recreational locations;
- Number of agencies and/or public events participated in for coordination of regional transit services;
- A net increase in the number of programs sustained by available grant programs; and
- An increase in the number of service options in the regional service area.
- Continued increase to the RED Line ridership number
- Enhance customer experience through increased coordination of services
- Better/more communication with callers to understand transportation options

Mobility Management is the most effective way to facilitate communication and coordination with customers and partners. Mobility Management also builds partnerships between providers by bringing all providers together in the coordination process. Increasing community partner coordination also satisfies the coordinated planning requirement in accordance with the Cherriots Program Management Plan.

## 2. Project impact on four goals of transit

### a.) Describe the project's impact on access.

*Access includes the ability of seniors and people with disabilities to travel to employment opportunities, community services, education, healthcare, etc., and to safely arrive at and depart their transit stop.*

The Cherriots Call Center provides the means for seniors and individuals with disabilities who cannot use fixed-route bus transportation to access jobs, education, shopping, medical facilities, and recreational opportunities throughout the region by booking requested trips on RED Line, CherryLift, and CARTS.

The Partnership Coordination position provides current and potential providers the resources they need to provide access where service is not available and to provide connections from other transportation services. The more coordination is done, the more efficient the region's tax dollars can be spent, and the better chance that transportation services are not duplicated.

### b.) Describe the project's impact on availability.

*Availability includes spatial availability (service close to me), time availability (service when I need it), and the size of the service area.*

The Cherriots Call Center allows citizens to access public transportation from any location within Marion and Polk Counties. The Cherriots Call Center is open Monday-Friday 6:00 am to 7:00 pm and Saturdays from 10:00 am to 4:00 pm. Customers can call after hours and weekends to request rides by leaving a message. This increases the utilization of the Cherriots Call Center so that customers can make reservations on CherryLift, RED Line, and CARTS during times that customer service representatives are not immediately available to book a requested trip.

The Partnership Coordination position increases availability of projects by encouraging new service implementation through shared funding and/or capital resources amongst agencies and/or stakeholders for new service implementation.

**c.) Describe the project's impact on connectivity.**

*Connectivity includes the integration of services (routes, schedules, fare structures, information systems, modal transfer facilities).*

The Cherriots Call Center improves connectivity by providing a clearinghouse for requested trips so that duplication is eliminated in addition to ensuring that schedules (vehicle manifests) are created and carried out with the most shared ride opportunity. The Cherriots Call Center connects individuals to the transportation services they are calling to request trips on, in addition to providing a connection to other transportation services and programs that are available to assist individuals in accessing their community in a variety of venues.

The Partnership Coordination position leverages limited funding and resources through partnerships with providers and community groups focused on services for seniors and individuals with disabilities. By building awareness of funding opportunities and coordinating funding options, services can be integrated to provide more seamless connections for people throughout the region.

**d.) Describe this project's impact on economic development.**

*Economic development includes public transportation's contribution to providing connections for workers to employers, reducing congestion, influencing land use choice and land values, and providing employment opportunities.*

The Cherriots Call Center is the key to providing mobility options for individuals who need to access jobs, education, medical, shopping, and community events. These trips produce economic development for the region by providing mobility for seniors and individuals with disabilities who would otherwise just stay home and not spend money on goods and services in the region. The Partnership Coordination position provides the education and coordination of the region's services so that duplication is avoided and providers are given the largest opportunities for developing the most cost-effective public transportation options for the region.

Coordination and education of current and potential providers of public transportation serving seniors and individuals with disabilities provides mobility for these groups who need to get to jobs, education, shopping, medical facilities, and recreational locations. These transportation activities in turn provide an increase in the quality of life for these groups and encourage travel, which in turn encourages economic development throughout the region. It has been shown that the more mobility options people have, the more they engage in economic activities and the healthier the population remains.

### 3. Project Budget

Enter all costs involved in the **total** cost of the project.

Type	Amount
Labor (payroll) for Partnership Project	\$42,000
Contracted services	\$
Materials and supplies	\$
Operations	\$
Preventive maintenance	\$
Capital equipment	\$
Technology	\$
Call Center includes staff and operating cost based on actual usage of Cherrylift, and RED Line customers.	374,700
Other (office, telephone, legal, travel, meeting room)	
Other (describe)	\$
Other (describe)	\$
Project Total (press F9 to re-calculate)	\$416,700
Amount requested in this grant total project	\$110,722



**4. Provide the timeline of the project in the following table**

	<b>Step Description</b>	<b>Completion Date</b>
<b>1</b>	Partnership and Coordination Includes staff time, office supplies, and telephone costs to perform the project	6/30/2018
<b>2</b>	Call Center-CARTS, CherryLift and RED Line. Call Center operating charges are allocated to programs based on usage.	6/30/2018
<b>3</b>		
<b>4</b>		
<b>5</b>		
<b>6</b>		

**5. Is your application for a replacement vehicle?**

Yes (continue to #7)     No (continue to page 10)

**6. If yes to question 5, please indicate whether this application is for matching funds for the vehicle, or for the total cost of the vehicle.**

**Enter the following information about each vehicle to be replaced if only matching funds for the Transit Capital Discretionary Program are being requested:**

<b>Year</b>	<b>Make</b>	<b>Model</b>	<b>Vehicle Category</b>
			Choose an item.
			Choose an item.
			Choose an item.
			Choose an item.

This application requests the total cost of a vehicle

**Enter the following information about each vehicle to be replaced if the total cost of the vehicle is being requested:**

Vehicle Category*	Qty (#)	Cost Each (\$)	Total (\$)	No. Seats w/ADA Deployed	No. of ADA Stations	Total Capacity	Fuel Type*	Estimated Order Date	Estimated Delivery Date*
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
<b>Totals:</b>	<b>0</b>	<b>Grand Total:</b>	<b>0</b>						

\***Vehicle Category Descriptions:** <http://www.oregon.gov/ODOT/PT/resources/guidance-library/vehicle-descriptions-usefullife-standards.pdf>

\***Fuel Type Options:** (G) Gas, (D) Diesel, (B) Biodiesel, (HG) Hybrid-gas, (HD) Hybrid-diesel, (CNG) Compressed Natural Gas, (OF) Other alternative Fuel.


\***Estimated Delivery Date:** Minimum 160 days if ADA accessible.


**2017-2019 Section 5310(ODOT) Grant Application  
for Projects Located Within Marion and Polk Counties**

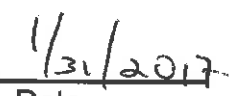
**C. ORGANIZATIONAL CERTIFICATION**

By submitting this document via email to Cherriots, I certify that the submitted materials and data included are complete, true and correct. Also, I certify that my organization is:

- Eligible to enter into agreements with Cherriots;
- Has the legal, managerial and operational capacity to do the work to be paid for by the Section 5310 Program;
- Not debarred or suspended from federal grants;
- In compliance with federal, state and local laws and regulations including, and not limited to, those pertaining to passenger transportation, civil rights, labor, insurance, safety and health, as applicable;
- Complies with the laws or rules of the Section 5310 Program;
- Properly uses and accounts for the Section 5310 Program's goals; and
- Will operate the project or service in a safe, prudent and timely manner.

  
Signature of Authorized Organization Officer

  
Title

  
Date

**2017 Section 5310(FTA)  
Grant Application  
for Projects Located Within the  
Salem-Keizer Urban Growth Boundary  
REDLine Preventative Maintenance**



## INTRODUCTION

- Read the *2017 Section 5310(FTA)Grant Application Instructions* prior to completing this application.
- Each project submitted for funding consideration must have its own application.
- Selection criteria are detailed in the *Application Instructions*.
- This form must be filled out using Microsoft Word and submitted as a Word or Adobe .pdf document. Paper applications will NOT be accepted.
- Signature pages should be scanned and attached as separate pages to each application.

### Submittal Checklist

#### ***Make sure***

- ✓ Application is complete, signed, and dated

#### ***Submit***

- ✓ Proof of agency status (template included in application packet)
- ✓ Ethnic and Racial Impact Statement
- ✓ Maintenance Plan (if submitting an application for preventive maintenance)

## A. ORGANIZATION INFORMATION

**Name of Organization:** Cherriots

**Contact Person:** Trisha Bunsen

**Address:** 555 Court St NE, Suite 5230, Salem, OR 97301

**Telephone:** 503-588-2424

**Email:** trisha.bunsen@cherriots.org

**Type of Organization (check one)**

Government Agency	<input type="checkbox"/>
Private Not-for-Profit	<input type="checkbox"/>
Other Public Transit District	<input checked="" type="checkbox"/>

**Area of service (check one)**

Inside Marion and Polk Counties	<input type="checkbox"/>
Outside Marion and Polk Counties	<input type="checkbox"/>
Both inside and outside Marion and Polk Counties	<input checked="" type="checkbox"/>

**Organization Days and Hours of Operation**

Day	Hours
Sunday	N/A
Monday	5:00 am-12:20 am
Tuesday	5:00 am-12:20 am
Wednesday	5:00 am-12:20 am
Thursday	5:00 am-12:20 am
Friday	5:00 am-12:20 am
Saturday	10:00am –4:00pm Cherriots Call Center only
Please list any planned periods of service closure greater than 3 days (i.e., closed the week between Christmas Day and New Year’s Day)	

**Total transportation program costs by year**

FY16 (historical data, if applicable)	FY17 (projected, if applicable)	FY18
\$38,878,585	\$42,178,000	\$45,974,020

**B. PROJECT INFORMATION**

**Project Title** (will be used for reviewer reference and in public comment process. Example: Mobility Management for XYZ volunteer driver program)

RED Line Preventative Maintenance Project
---

**Project service area to be served** (indicate the geographic features that define your service area such as streets, rivers, or jurisdictional boundaries)

North boundary	
West boundary	
South boundary	
East boundary	
Other general geographic area (i.e.,	Within the Salem-Keizer Urban Growth Boundary

**Total Section 5310 funds requested**

\$14,960

**Start date**

July 1, 2017

**Funding request type (check one)**

Continuation of existing service at same level of service	<input checked="" type="checkbox"/>
Expansion of existing service	<input type="checkbox"/>
New service	<input type="checkbox"/>
Capital request	<input type="checkbox"/>
Other	<input type="checkbox"/>

**Scalable Section 5310 Grant Request**

*You are strongly encouraged to request the full amount of funding that is needed for each project, including funding for new projects; however, funding is limited. Describe the scalability of your STF funding request, how you scaled down your request and what aspects of the program would not be funded under this funding scenario below. Then enter your scaled down request amounts.*

*Scalability Description: Scalability of this work would be difficult without utilizing general fund dollars, which have not been budgeted for this work. Therefore, Cherriots is requesting the full amount only.*

	FFY18
Scaled request:	\$14,960

**Identify the project's additional sources of funding in the table below**

Estimated Additional Project Resources	
Source of Funds	Dollar Amount
2017 Section 5310 Grant Request ( <i>Important!</i> )	\$14,960
Local Resources	\$
Federal Resources	\$
Other (provide description): STF match	\$3,740
Project Grand Total	\$18,700

The award of this Section 5310 Grant will enable federal funds to be brought to the project.

## Coordinated Plan

Is project derived from the Cherriots *Coordinated Public Transit – Human Services Transportation Plan* dated August, 2016?  Yes  No If yes, what page?

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If no, explain why the project is not part of the Coordinated Plan.

*For example: Is the project part of another plan (please name)? Is the plan still being finalized?*

### 1. Project Description

#### a.) Describe services or capital investment to be provided by Section 5310 funding.

Include a description of the following:

- Who you will serve?

This grant will provide funding for preventative maintenance (PM) on vehicles being used on the RED Line service, a shopper shuttle and demand response service provided for the elderly and persons with disabilities. The RED Line fleet consists of five vehicles, four in service and a spare. Preventative maintenance is provided by Cherriots Maintenance Facility staff located at the Del Webb Maintenance facility. RED Line Shopper Shuttle provided 7850 one way rides in FY16, operated 4,069 revenue hours, and over 41,555 miles. Customers call the Cherriots Call Center formerly known as TripLink up to two weeks in advance to reserve their spot on the shuttle.

RED Line provides a Shopper Shuttle service and Dial-a-Ride service to seniors and people with disabilities within the urban growth boundaries of Salem and Keizer. RED Line operates shopping trips each day from various segments of the region. RED Line picks customers up at their home and travels to a pre-determined location. Shuttles provide service once in the morning and once in the afternoon from each region throughout the week. Stores have been selected with criteria for one-stop services (groceries, pharmacy, household supplies) along with customer requests. Each area or neighborhood is provided approximately 75 minutes at the store in their region before returning home. On the return trip, RED Line bus operators can assist customers with their groceries. Examples of destination locations are Winco, Fred Meyer and Wal-Mart.

Not only does this public service provide a necessary trip to the store, it also provides a social outlet to many who have limited means of transportation and are generally at home alone. The RED Line is open to any senior 60+ or persons with disabilities without a qualifying interview. RED Line service is for seniors age 60+ and persons with disabilities whom may or may not be eligible for ADA paratransit services, which may include low-income populations and senior housing communities. Also available is a Dial-A-Ride service. Trips can be reserved up to two weeks in advance; however same day requests are taken if room is available. RED Line runs Monday through Friday from 7:00 AM to 6:30 PM, and observes the same holiday closures as Cherriots fixed-route services.

The RED Line transportation service is marketed through social media channels; the web; targeted geographic location mailers; advertisements in local newspapers, and the promotion of the RED Line transportation service at informational tables and community presentation opportunities.



**b.) Will your project activities preserve existing service and/or provide new service?**

*Describe how the project preserves existing service or provides new or expanded service, limit 200 words*

The project will preserve the existing RED Line service.

**c.) Will you coordinate between providers to avoid duplication? Describe what level of coordination between partners is done and how duplication is avoided, limit 200 words**

The Cherriots Call Center provides coordination of transportation services inside the Salem-Keizer Urban Growth Boundary (UGB) and by referring customers to a variety of transportation services that are available.

**d.) Is your project cost-effective?**

*Describe average cost per ride, cost per mile and cost per hour, limit 200 words*

RED Line buses are owned by CHERRIOTS. Preventative Maintenance is performed in-house by a full-service maintenance department, which allows for continuity in maintenance repairs and record-keeping. Average Preventative Maintenance costs for the RL service is approximately 0.47/per mile.

*Describe the **need** for this project. How was this need determined or assessed? Max 2,500 characters/approx. 400 words*

RED Line service is an integral part of our complete transit network and provides increased transportation options for seniors and persons with disabilities; therefore, providing more independence for those populations. RED Line provides public transportation for individuals with disabilities and senior citizens who may or may not be eligible for ADA paratransit and/or may or may not be able to access fixed route services. Many riders appreciate direct rides to services and shopping as opposed to accessing traditional fixed route services.

**f.) Expected Outcomes**

*Describe the expected outcomes of this project on seniors and people with disabilities. Why is this project the best method to address the previously described need? Max 2,500 characters/approx. 400 words*

The expected outcome is to maintain the RED Line fleet in good condition which ensures safe, reliable transportation for citizens. RED Line service provides mobility for those seniors and individuals with disabilities for who do not qualify for CherryLift and who cannot access Cherriots fixed-route services. RED Line fills an unmet need for transportation for seniors and individuals with disabilities within the Salem-Keizer urbanized area.

**2. Project impact on four goals of transit**

**a.) Describe the project's impact on access.**

*Access includes the ability of seniors and people with disabilities to travel to employment opportunities, community services, education, healthcare, etc., and to safely arrive at and depart their transit stop.*

RED Line provides the means for seniors and individuals with disabilities who cannot use fixed-route bus transportation to access jobs, education, shopping, medical facilities, and recreational opportunities throughout the region.

**b.) Describe the project's impact on availability.**

*Availability includes spatial availability (service close to me), time availability (service when I need it), and the size of the service area.*

RED Line is available 7:00 am to 6:30 pm Monday through Friday and allows customers to access community services, jobs, education, medical appointments, and shopping. RED Line, as with all CHERRIOTS transit services does not operate on weekends.

**c.) Describe the project's impact on connectivity.**

*Connectivity includes the integration of services (routes, schedules, fare structures, information systems, modal transfer facilities).*

Cherriots Call Center staff are trained to take cues from the caller and then connect them to the appropriate transportation option of which RED Line is one of many. This reduces duplication of services offered and increases reliability of existing services.

**d.) Describe this project's impact on economic development.**

*Economic development includes public transportation's contribution to providing connections for workers to employers, reducing congestion, influencing land use choice and land values, and providing employment opportunities.*

RED Line allows citizens to shop, access recreation, jobs, education, medical, and other community services. RED Line promotes spending within the local community.

### 3. Project Budget

Enter all costs involved in the **total** cost of the project.

Type	Amount
Labor (payroll)	\$
Contracted services	\$
Materials and supplies	\$
Operations	\$
Preventive maintenance	\$18,700
Capital equipment	\$
Technology	\$
Other (describe)	\$
Other (describe)	\$
Other (describe)	\$
Other (describe)	\$
Project Total (press F9 to re-calculate)	\$18,700
Amount requested in this grant	\$14,960

**4. Provide the timeline of the project in the following table**

	<b>Step Description</b>	<b>Completion Date</b>
1	Provide Preventative Maintenance on RED Line Vehicles start	July 1, 2017
2	Provide Preventative Maintenance on RED Line Vehicles end	June 30, 2018
3		
4		
5		
6		

**5. Is your application for a replacement vehicle?**

Yes (continue to #7)     No (continue to page 10)

**6. If yes to question 5, please indicate whether this application is for matching funds for the vehicle, or for the total cost of the vehicle.**

**Enter the following information about each vehicle to be replaced if only matching funds for the Transit Capital Discretionary Program are being requested:**

<b>Year</b>	<b>Make</b>	<b>Model</b>	<b>Vehicle Category</b>
			Choose an item.
			Choose an item.
			Choose an item.
			Choose an item.

This application requests the total cost of a vehicle

**Enter the following information about each vehicle to be replaced if the total cost of the vehicle is being requested:**

Vehicle Category*	Qty (#)	Cost Each (\$)	Total (\$)	No. Seats w/ADA Deployed	No. of ADA Stations	Total Capacity	Fuel Type*	Estimated Order Date	Estimated Delivery Date*
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
<b>Totals:</b>	<b>0</b>	<b>Grand Total:</b>	<b>0</b>						

\***Vehicle Category Descriptions:** <http://www.oregon.gov/ODOT/PT/resources/guidance-library/vehicle-descriptions-usefullife-standards.pdf>

\***Fuel Type Options:** (G) Gas, (D) Diesel, (B) Biodiesel, (HG) Hybrid-gas, (HD) Hybrid-diesel, (CNG) Compressed Natural Gas, (OF) Other alternative Fuel.

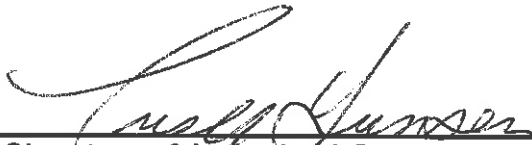
\***Estimated Delivery Date:** Minimum 160 days if ADA accessible.


**2017-2019 Section 5310(ODOT) Grant Application  
for Projects Located Within Marion and Polk Counties**

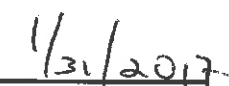
**C. ORGANIZATIONAL CERTIFICATION**

By submitting this document via email to Cherriots, I certify that the submitted materials and data included are complete, true and correct. Also, I certify that my organization is:

- Eligible to enter into agreements with Cherriots;
- Has the legal, managerial and operational capacity to do the work to be paid for by the Section 5310 Program;
- Not debarred or suspended from federal grants;
- In compliance with federal, state and local laws and regulations including, and not limited to, those pertaining to passenger transportation, civil rights, labor, insurance, safety and health, as applicable;
- Complies with the laws or rules of the Section 5310 Program;
- Properly uses and accounts for the Section 5310 Program's goals; and
- Will operate the project or service in a safe, prudent and timely manner.

  
Signature of Authorized Organization Officer

  
Title

  
Date

**2017 Section 5310(FTA)  
Grant Application  
for Projects Located Within the  
Salem-Keizer Urban Growth Boundary  
Purchased Service**



## INTRODUCTION

- Read the *2017 Section 5310(FTA)Grant Application Instructions* prior to completing this application.
- Each project submitted for funding consideration must have its own application.
- Selection criteria are detailed in the *Application Instructions*.
- This form must be filled out using Microsoft Word and submitted as a Word or Adobe .pdf document. Paper applications will NOT be accepted.
- Signature pages should be scanned and attached as separate pages to each application.

### Submittal Checklist

#### ***Make sure***

- ✓ Application is complete, signed, and dated

#### ***Submit***

- ✓ Proof of agency status (template included in application packet)
- ✓ Ethnic and Racial Impact Statement
- ✓ Maintenance Plan (if submitting an application for preventive maintenance)

## A. ORGANIZATION INFORMATION

**Name of Organization:** Cherriots

**Contact Person:** Trisha Bunsen

**Address:** 555 Court St NE, Suite 5230, Salem, OR 97301

**Telephone:** 503-588-2424

**Email:** trisha.bunsen@cherriots.org



**Type of Organization (check one)**

Government Agency	<input type="checkbox"/>
Private Not-for-Profit	<input type="checkbox"/>
Other Public Transit District	<input checked="" type="checkbox"/>

**Area of service (check one)**

Inside Marion and Polk Counties	<input type="checkbox"/>
Outside Marion and Polk Counties	<input type="checkbox"/>
Both inside and outside Marion and Polk Counties	<input checked="" type="checkbox"/>

**Organization Days and Hours of Operation**

Day	Hours
Sunday	5:00 am-12:20 am
Monday	5:00 am-12:20 am
Tuesday	5:00 am-12:20 am
Wednesday	5:00 am-12:20 am
Thursday	5:00 am-12:20 am
Friday	5:00 am-12:20 am
Saturday	10:00-4:00 pm Cherriots Call Center only
Please list any planned periods of service closure greater than 3 days (i.e., closed the week between Christmas Day and New Year's Day)	

**Total transportation program costs by year**

FY16 (historical data, if applicable)	FY17 (projected, if applicable)	FY18
\$38,878,585	\$42,178,000	\$45,974,020

**B. PROJECT INFORMATION**

**Project Title** (will be used for reviewer reference and in public comment process. Example: Mobility Management for XYZ volunteer driver program)

RED Line Service Operation
----------------------------

**Project service area to be served** (indicate the geographic features that define your service area such as streets, rivers, or jurisdictional boundaries)

North boundary	(see below)
West boundary	(see below)
South boundary	(see below)
East boundary	(see below)
Other general geographic area (i.e., within the City of Woodburn)	Inside the Cherriots Urban Growth Boundary

Optional: please provide a map of your service area as a separate single page 8.5"x11" attachment.

**Total Section 5310 funds requested**

\$102,830

**Start date**

July 1, 2017

**Funding request type (check one)**

Continuation of existing service at same level of service	<input checked="" type="checkbox"/>
Expansion of existing service	<input type="checkbox"/>
New service	<input type="checkbox"/>
Capital request	<input type="checkbox"/>
Other	<input type="checkbox"/>

**Scalable Section 5310 Grant Request**

You are strongly encouraged to request the full amount of funding that is needed for each project, including funding for new projects; however, funding is limited. Describe the scalability of your STF funding request, how you scaled down your request and what aspects of the program would not be funded under this funding scenario below. Then enter your scaled down request amounts.

Scalability Description: Scalability of this work would be difficult without utilizing general fund dollars, which have not been budgeted for this work. Therefore, Cherriots is requesting the full amount only.

	FFY18
Scaled request:	\$102,830

**Identify the project's additional sources of funding in the table below**

Estimated Additional Project Resources	
Source of Funds	Dollar Amount
2017 Section 5310 Grant Request ( <i>Important!</i> )	\$102,830
Local Resources	\$
Federal Resources ODOT 5310	\$26,919
Other (provide description): STF Match	\$36,336
Project Grand Total	\$166,085

The award of this Section 5310 Grant will enable federal funds to be brought to the project.

## Coordinated Plan

Is project derived from the Cherriots *Coordinated Public Transit – Human Services Transportation Plan* dated August, 2016?  Yes  No If yes, what page?

p. 67

If no, explain why the project is not part of the Coordinated Plan.

*For example: Is the project part of another plan (please name)? Is the plan still being finalized?*

### 1. Project Description

#### a.) Describe services or capital investment to be provided by Section 5310 funding.

Include a description of the following:

- Who you will serve?
- What geographic area you will serve?
- What level of service will be provided to customers?
- Operational activities; how will customers request and receive rides, including scheduling and dispatching?
- Describe if volunteers will be utilized to provide service and how this will occur (will the volunteer program be supported with STF or other funds? Will you provide mileage reimbursement to volunteers using their own vehicles?).
- How will the service be marketed?

This project will fund the purchase of services of the RED Line operations. The RED Line provides shopper shuttle and dial-a-ride services to seniors and individuals with disabilities within the urban growth boundaries of Salem and Keizer. Customers call the Cherriots Call Center (formerly known as TripLink) up to two weeks in advance to reserve their spot on the shuttle.

RED Line operates shopping trips each day from various segments of the region. RED Line picks customers up at their home and travels to a pre-determined location. Shuttles provide service once in the morning and once in the afternoon from each region throughout the week. Stores have been selected with criteria for one-stop services (groceries, pharmacy, household supplies) along with customer requests. Each area or neighborhood is provided approximately 75 minutes at the store in their region before returning home. On the return trip, RED Line bus operators can assist customers with their groceries. Examples of destination locations are Winco, Fred Meyer and Wal-Mart.

Not only does this public service provide a necessary trip to the store, it also provides a social outlet to many who have limited means of transportation and are generally at home alone. This transportation is open to any senior 60+ or persons with disabilities without a qualifying interview. RED Line service is for seniors age 60+ and persons with disabilities whom may or may not be eligible for ADA paratransit services, which may include low-income populations and senior housing communities. Also available is a Dial-A-Ride service. These trips can be reserved up to two weeks in advance; however same day requests are taken if room is available. RED Line runs Monday through Friday from 7:00 AM to 6:30 PM, and observes the same holiday closures as Cherriots fixed-route services.

The RED Line transportation service is marketed through social media channels; the web; targeted geographic location mailers; advertisements in local newspapers, and the promotion of the RED Line transportation service at informational tables and community presentation opportunities.

**b.) Will your project activities preserve existing service and/or provide new service?**

*Describe how the project preserves existing service or provides new or expanded service, limit 200 words*

This project will preserve the existing RED Line service as well as encourage growth through the Cherriots Call Center referrals and access to information.

**c.) Will you coordinate between providers to avoid duplication? Describe what level of coordination between partners is done and how duplication is avoided, limit 200 words**

The Cherriots Call Center provides coordination of transportation services inside the Salem-Keizer Urban Growth Boundary (UGB) and by referring customers to a variety of transportation services that are available.

**d.) Is your project cost- effective?**

*Describe average cost per ride, cost per mile and cost per hour, limit 200 words*

The RED Line Shopper Shuttle and Dial-a-Ride provided approximately 7850 rides in 2016. The RED Line shopper service is delivered at a lower average total cost per trip than the more expensive ADA paratransit service. Redline cost includes shopper shuttle and on demand services. The average trip cost per ride is \$35.14; cost per mile is \$6.51; cost per hour is \$65.14. RED Line cost is lower than federally-mandated ADA Paratransit service.

**e.) Project Quality**

*Describe the **need** for this project. How was this need determined or assessed? Max 2,500 characters/approx. 400 words*

RED Line provides public transportation for individuals with disabilities and senior citizens who may or may not be eligible for ADA paratransit and/or may or may not be able to access fixed route services. Many riders appreciate direct rides to services and shopping as opposed to accessing traditional fixed route services.

**f.) Expected Outcomes**

*Describe the expected outcomes of this project on seniors and people with disabilities. Why is this project the best method to address the previously described need? Max 2,500 characters/approx. 400 words*

One expected outcome of the RED Line service is to provide mobility for those seniors and individuals with disabilities for who do not qualify for CherryLift and who cannot access Cherriots fixed-route buses. RED Line fills an unmet need for transportation for seniors and individuals with disabilities within the Salem-Keizer urbanized area.

**2. Project impact on four goas of transit**

**Describe the project's impact on access.**

*Access includes the ability of seniors and people with disabilities to travel to employment opportunities, community services, education, healthcare, etc., and to safely arrive at and depart their transit stop.*

RED Line provides the means for seniors and individuals with disabilities who cannot use fixed-route bus transportation to access jobs, education, shopping, medical facilities, and recreational opportunities throughout the region.

**a.) Describe the project's impact on availability.**

*Availability includes spatial availability (service close to me), time availability (service when I need it), and the size of the service area.*

RED Line is available 7:00 am to 6:30 pm Monday through Friday and allows customers to access community services, jobs, education, medical appointments, and shopping. RED Line, as with all CHERRIOTS transit services does not operate on weekends.

**b.) Describe the project's impact on connectivity.**

*Connectivity includes the integration of services (routes, schedules, fare structures, information systems, modal transfer facilities.*

Cherriots Call Center staff is trained to take cues from the caller and then connect them to the appropriate transportation option of which RED Line is one of many. This reduces duplication of services offered and increases reliability of existing services.

**c.) Describe this project's impact on economic development.**

*Economic development includes public transportation's contribution to providing connections for workers to employers, reducing congestion, influencing land use choice and land values, and providing employment opportunities.*

RED Line allows citizens to shop, access recreation, jobs, education, medical, and other community services. RED Line promotes spending within the local community by providing the means for seniors and individuals with disabilities to get to these important community resources.

### 3. Project Budget

Enter all costs involved in the **total** cost of the project.

Type	Amount
Labor (payroll)	\$
Contracted services Redline	169,500
Materials and supplies	\$
Operations	\$
Preventive maintenance	\$
Capital equipment	\$
Technology	\$
Other (describe)	\$
Other (describe)	\$
Other (describe)	\$
Other (describe)	\$
Project Total (press F9 to re-calculate)	\$169,500
Amount requested in this grant	\$102,830

**4. Provide the timeline of the project in the following table**

	<b>Step Description</b>	<b>Completion Date</b>
<b>1</b>	Contracted Service start	July 1, 2017
<b>2</b>	Contracted Service end	June 30, 2018
<b>3</b>		
<b>4</b>		
<b>5</b>		
<b>6</b>		

**5. Is your application for a replacement vehicle?**

Yes (continue to #7)     No (continue to page 10)

**6. If yes to question 5, please indicate whether this application is for matching funds for the vehicle, or for the total cost of the vehicle.**

**Enter the following information about each vehicle to be replaced if only matching funds for the Transit Capital Discretionary Program are being requested:**

<b>Year</b>	<b>Make</b>	<b>Model</b>	<b>Vehicle Category</b>
			Choose an item.
			Choose an item.
			Choose an item.
			Choose an item.

This application requests the total cost of a vehicle

**Enter the following information about each vehicle to be replaced if the total cost of the vehicle is being requested:**

Vehicle Category*	Qty (#)	Cost Each (\$)	Total (\$)	No. Seats w/ADA Deployed	No. of ADA Stations	Total Capacity	Fuel Type*	Estimated Order Date	Estimated Delivery Date*
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
<b>Totals:</b>	<b>0</b>	<b>Grand Total:</b>	<b>0</b>						

**\*Vehicle Category Descriptions:** <http://www.oregon.gov/ODOT/PT/resources/guidance-library/vehicle-descriptions-usefullife-standards.pdf>

**\*Fuel Type Options:** (G) Gas, (D) Diesel, (B) Biodiesel, (HG) Hybrid-gas, (HD) Hybrid-diesel, (CNG) Compressed Natural Gas, (OF) Other alternative Fuel.

**\*Estimated Delivery Date:** Minimum 160 days if ADA accessible.

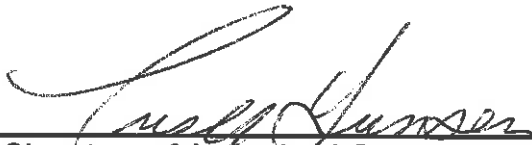



**2017-2019 Section 5310(ODOT) Grant Application  
for Projects Located Within Marion and Polk Counties**

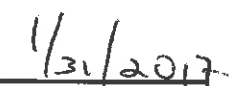
**C. ORGANIZATIONAL CERTIFICATION**

By submitting this document via email to Cherriots, I certify that the submitted materials and data included are complete, true and correct. Also, I certify that my organization is:

- Eligible to enter into agreements with Cherriots;
- Has the legal, managerial and operational capacity to do the work to be paid for by the Section 5310 Program;
- Not debarred or suspended from federal grants;
- In compliance with federal, state and local laws and regulations including, and not limited to, those pertaining to passenger transportation, civil rights, labor, insurance, safety and health, as applicable;
- Complies with the laws or rules of the Section 5310 Program;
- Properly uses and accounts for the Section 5310 Program's goals; and
- Will operate the project or service in a safe, prudent and timely manner.

  
Signature of Authorized Organization Officer

  
Title

  
Date

**2017-2019 Section 5310(ODOT)  
Grant Application  
for Projects Located Within  
Marion and Polk Counties**



# 2017-2019 Section 5310(ODOT) Grant Application for Projects Located Within Marion and Polk Counties

## INTRODUCTION

- Read the *2017-2019 Section 5310(ODOT) Grant Application Instructions* prior to completing this application.
- Each project submitted for funding consideration must have its own application.
- Selection criteria are detailed in the *Application Instructions*.
- This form must be filled out using Microsoft Word and submitted as a Word or Adobe .pdf document. Paper applications will NOT be accepted.
- Signature pages should be scanned and attached as separate pages to each application.

## Submittal Checklist

### *Make sure*

- ✓ Application is complete, signed, and dated

### *Submit*

- ✓ Proof of agency status (template included in application packet)
- ✓ Ethnic and Racial Impact Statement
- ✓ Maintenance Plan (if submitting an application for preventive maintenance)

## A. ORGANIZATION INFORMATION

**Name of Organization: Salem Area Mass Transit District**

**Contact Person: Trish Bunsen**

**Address: 555 Court Street NE Ste. 5230**

**Telephone: 503.361.7531**

**Email: trisha.bunsen@cherriots.org**

**2017-2019 Section 5310(ODOT) Grant Application  
for Projects Located Within Marion and Polk Counties**

**Type of Organization (check one)**

Government Agency	<input type="checkbox"/>
Private Not-for-Profit	<input type="checkbox"/>
Other Public Transit District	<input checked="" type="checkbox"/>

**Area of service (check one)**

Inside Marion and Polk Counties	<input type="checkbox"/>
Outside Marion and Polk Counties	<input type="checkbox"/>
Both inside and outside Marion and Polk Counties	<input checked="" type="checkbox"/>

**Organization Days and Hours of Operation**

Day	Hours
Sunday	N/A
Monday	5:00 am-12:20 am
Tuesday	5:00 am-12:20 am
Wednesday	5:00 am-12:20 am
Thursday	5:00 am-12:20 am
Friday	5:00 am-12:20 am
Saturday	10:00am –4:00pm call center only
Please list any planned periods of service closure greater than 3 days (i.e., closed the week between Christmas Day and New Year's Day)	

**Total transportation program costs by year**

FY16 (historical data, if applicable) 38,878,585	FY17 (projected, if applicable) 42,178,000	FY18 \$45,974,020
---	---	----------------------

**B. PROJECT INFORMATION**

**Project Title** *(will be used for reviewer reference and in public comment process. Example: Mobility Management for XYZ volunteer driver program)*

Preventative Maintenance
--------------------------

**Project service area to be served** *(indicate the geographic features that define your service area such as streets, rivers, or jurisdictional boundaries)*

North boundary	
West boundary	
South boundary	
East boundary	
Other general geographic area (i.e., within the City of Woodburn)	Inside the Salem-Keizer Urban Growth Boundary in addition to the counties of Marion, Polk, and Linn

*Optional: please provide a map of your service area as a separate single page 8.5"x11"*

**2017-2019 Section 5310(ODOT) Grant Application  
for Projects Located Within Marion and Polk Counties**

attachment.

**Total Section 5310(ODOT) funds requested**

359,055
---------

**Start date**

July 1, 2017
--------------

**Funding request type (check one)**

Continuation of existing service at same level of service	<input checked="" type="checkbox"/>
Expansion of existing service	<input type="checkbox"/>
New service	<input type="checkbox"/>
Capital request	<input type="checkbox"/>
Other	<input type="checkbox"/>

**Project Service Types (check all that apply)** *What type of service will be supported with the 5310(ODOT) grant?*

A. Open to the general public at all times	<input checked="" type="checkbox"/>
B. Open only to seniors and individuals with disabilities	<input type="checkbox"/>
C. Demand response	<input type="checkbox"/>
D. Open to the general public on a space-available basis	<input type="checkbox"/>
E. Limited to defined clientele (i.e., residential home)	<input type="checkbox"/>
F. Deviated route	<input checked="" type="checkbox"/>
G. Other (commuter):	<input checked="" type="checkbox"/>

**Project Types (check all that apply)** *Select the project types that you wish to include in your application.*

A. Purchased service	<input type="checkbox"/>
B. Mobility Management	<input type="checkbox"/>
C. Replacement Vehicle(s)	<input type="checkbox"/>
D. Service Expansion and Right-sizing Vehicles	<input type="checkbox"/>
E. Capitalized Vehicle Preventive Maintenance	<input checked="" type="checkbox"/>
F. Equipment	<input type="checkbox"/>
G. Signs and Other Amenities	<input type="checkbox"/>
H. Passenger Shelters	<input type="checkbox"/>
I. Facilities (Bus Barns and Other Buildings)	<input type="checkbox"/>

**Scalable Section 5310(ODOT) Grant Request**

*You are strongly encouraged to request the full amount of funding that is needed for each project, including funding for new projects; however, funding is limited. Describe the scalability of your 5310(ODOT) funding request, how you scaled down your request and what aspects of the*

**2017-2019 Section 5310(ODOT) Grant Application  
for Projects Located Within Marion and Polk Counties**

*program would not be funded under this funding scenario below. Then enter your scaled down request amounts.*

**Scalability Description:**  
*Scalability of this work would be difficult without utilizing general fund dollars, which have not been budgeted for this work. Therefore, Cherriots is requesting the full amount only*

		FY18	FY19
Scaled request:	\$	\$	\$

**Identify the project’s additional sources of funding in the table below**

<b>Estimated Additional Project Resources</b>	
<b>Source of Funds</b>	<b>Dollar Amount</b>
2017-2019 Section 5310(ODOT) Grant Request ( <i>Important!</i> )	\$359,054
Local Resources STF	
Federal Resources	\$
Other (provide description): STF match	\$41,096
<b>Project Grand Total</b>	<b>\$400,150</b>

**Coordinated Plan**

Is project derived from the *Cherriots Coordinated Public Transit – Human Services Transportation Plan* dated August, 2016?  Yes  No If yes, what page(s)? 59

If no, explain why the project is not part of the Coordinated Plan.

*For example: Is the project part of another plan (please name)? Is the plan still being finalized?*

**1. Project Description**

**a.) Describe services or capital investment to be provided by Section 5310(ODOT) funding.** Include a description of the following:

- Who you will serve?
- What geographic area you will serve?
- What level of service will be provided to customers?

**2017-2019 Section 5310(ODOT) Grant Application  
for Projects Located Within Marion and Polk Counties**

- Operational activities; how will customers request and receive rides, including scheduling and dispatching?
- Describe if volunteers will be utilized to provide service and how this will occur (will the volunteer program be supported with 5310(ODOT) or other funds? Will you provide mileage reimbursement to volunteers using their own vehicles?).
- How will the service be marketed?

This project will fund the preventative maintenance on approximately 15 CARTS buses. Maintenance is provided by SAMTD at the Del Webb maintenance facility. The budget reflects the total costs; administration, labor, parts, and replacement costs to maintain the buses. This project does not provide for maintenance on staff vehicles, or maintenance vehicles. This project also does not include repairs resulting from motor vehicle accidents covered by insurance, repairs on vehicles or components under warranty, or repairs which are paid for in other agreements or contracts. CARTS provides deviated fixed route, flex route and dial-a-ride services in the rural areas of Marion and Polk Counties. The service is operated Monday through Friday from 6:00 AM to 8:00 PM. CARTS serves seniors, individuals with disabilities, in addition to general population riders. Trips are reserved by calling the Cherriots Call Center, formerly known as TripLink.

CARTS is marketed through social media channels; the web; targeted geographic location mailers; advertisements in local newspapers, and the promotion of transportation services at informational tables and community presentation opportunities.

**b.) Will your project activities preserve existing service and/or provide new service?**

*Describe how the project preserves existing service or provides new or expanded service, limit 200 words*

Preserve existing service

**c.) Will you coordinate between providers to avoid duplication? Describe what level of coordination between partners is done and how duplication is avoided, limit 200 words**

The Cherriots Call Center provides coordination of transportation services inside the Cherriots service area and by referring customers to other providers and public transportation outside the Cherriots service area.

**2017-2019 Section 5310(ODOT) Grant Application  
for Projects Located Within Marion and Polk Counties**

**d.) Is your project cost- effective?**

*Describe average cost per ride, cost per mile and cost per hour, limit 200 words*

CARTS buses are owned by CHERRIOTS. Preventative Maintenance is performed in-house with a full service maintenance department which keeps costs down.

Cost per ride: CARTS \$13.21

Cost per mile: CARTS \$4.13

Cost per hour: CARTS \$76.52

**e.) Project Quality**

*Describe the **need** for this project. How was this need determined or assessed? Max 2,500 characters/approx. 400 words*

CARTS service connects seniors and people with disabilities to the necessary services in nearby cities that are not located in rural areas such as the Social Security office, DHS office, medical offices and rehabilitative job sites.

**f.) Expected Outcomes**

*Describe the expected outcomes of this project on seniors and people with disabilities. Why is this project the best method to address the previously described need? Max 2,500 characters/approx. 400 words*

The expected outcome is to maintain the CARTS fleet in good condition which ensures safe, reliable transportation for citizens. CARTS services provides mobility for those seniors and individuals with disabilities within and around the surrounding rural areas of Salem-Keizer. CARTS fills an unmet need for transportation for seniors and individuals with disabilities within and around the surrounding rural areas of Salem-Keizer.

**2. Project impact on four goals of transit**

**a.) Describe the project's impact on access.**

*Access includes the ability of seniors and people with disabilities to travel to employment opportunities, community services, education, healthcare, etc., and to*



**2017-2019 Section 5310(ODOT) Grant Application  
for Projects Located Within Marion and Polk Counties**

*safely arrive at and depart their transit stop.*

CARTS provides transportation for seniors and individuals with disabilities to access jobs, education, shopping, medical facilities, and recreational opportunities throughout the region.

**b.) Describe the project's impact on availability.**

*Availability includes spatial availability (service close to me), time availability (service when I need it), and the size of the service area.*

CARTS is available from approximately 6:00 am to 7:30 pm (depending on the route) Monday through Friday and allows customers to access community services, jobs, education, medical appointments, and shopping throughout the region. CARTS, as with all CHERRIOTS services, does not operate on weekends.

**c.) Describe the project's impact on connectivity.**

*Connectivity includes the integration of services (routes, schedules, fare structures, information systems, modal transfer facilities).*

CARTS service connects seniors, people with disabilities, low income, and the general public with 16 communities. Customers use CARTS to connect with employment, education, medical services, and social or recreational opportunities.

**d.) Describe this project's impact on economic development.**

*Economic development includes public transportation's contribution to providing connections for workers to employers, reducing congestion, influencing land use choice and land values, and providing employment opportunities.*

CARTS allows citizens to shop, access recreation, jobs, education, medical, and other community services, promotes spending within the local community and rural region.

**2017-2019 Section 5310(ODOT) Grant Application  
for Projects Located Within Marion and Polk Counties**

**3. Project Budget**

Enter all costs involved in the **total** cost of the project.

Type	Amount
Labor (payroll), parts labor and parts to maintain buses	
Contracted services	\$
Materials and supplies	\$
Operations	\$
CARTs Preventive maintenance	400,150
Capital equipment	\$
Technology	\$
Other (describe)	\$
Other (describe)	\$
Other (describe)	\$
Other (describe)	\$
<b>Project Total (right click and select "Update Field" to correct total)</b>	400,150
Amount requested in this grant	\$359,054

**2017-2019 Section 5310(ODOT) Grant Application  
for Projects Located Within Marion and Polk Counties**

4. Provide the timeline of the project in the following table

	<b>Step Description</b>	<b>Completion Date</b>
<b>1</b>	<b>Start service</b>	<b>July 1,2017</b>
<b>2</b>	<b>End Service</b>	<b>June 30, 2019</b>
<b>3</b>		
<b>4</b>		
<b>5</b>		
<b>6</b>		

5. Is your application for a replacement vehicle?

- Yes (continue to #6)     No (go on to Section C)

**2017-2019 Section 5310(ODOT) Grant Application  
for Projects Located Within Marion and Polk Counties**

**6. Enter the following information about each vehicle to be replaced if the total cost of the vehicle is being requested:**

<b>Vehicle Category*</b>	<b>Qty (#)</b>	<b>Cost Each (\$)</b>	<b>Total (\$)</b>	<b>No. Seats w/ADA Deployed</b>	<b>No. of ADA Stations</b>	<b>Total Capacity</b>	<b>Fuel Type*</b>	<b>Estimated Order Date</b>	<b>Estimated Delivery Date*</b>
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
<b>Totals:</b>	<b>0</b>	<b>Grand Total:</b>	<b>0</b>						

**\*Vehicle Category Descriptions:** <http://www.oregon.gov/ODOT/PT/resources/guidance-library/vehicle-descriptions-usefullife-standards.pdf>

**\*Fuel Type Options:** (G) Gas, (D) Diesel, (B) Biodiesel, (HG) Hybrid-gas, (HD) Hybrid-diesel, (CNG) Compressed Natural Gas, (OF) Other alternative Fuel.


**\*Estimated Delivery Date:** Minimum 160 days if ADA accessible.


**2017-2019 Section 5310(ODOT) Grant Application  
for Projects Located Within Marion and Polk Counties**

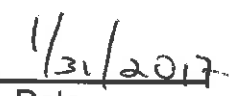
**C. ORGANIZATIONAL CERTIFICATION**

By submitting this document via email to Cherriots, I certify that the submitted materials and data included are complete, true and correct. Also, I certify that my organization is:

- Eligible to enter into agreements with Cherriots;
- Has the legal, managerial and operational capacity to do the work to be paid for by the Section 5310 Program;
- Not debarred or suspended from federal grants;
- In compliance with federal, state and local laws and regulations including, and not limited to, those pertaining to passenger transportation, civil rights, labor, insurance, safety and health, as applicable;
- Complies with the laws or rules of the Section 5310 Program;
- Properly uses and accounts for the Section 5310 Program's goals; and
- Will operate the project or service in a safe, prudent and timely manner.

  
Signature of Authorized Organization Officer

  
Title

  
Date

# **2017-2019 Section 5310(ODOT) Grant Application**

**for Projects Located Within  
Marion and Polk Counties**

Mobility Management



# 2017-2019 Section 5310(ODOT) Grant Application for Projects Located Within Marion and Polk Counties

## INTRODUCTION

- Read the *2017-2019 Section 5310(ODOT) Grant Application Instructions* prior to completing this application.
- Each project submitted for funding consideration must have its own application.
- Selection criteria are detailed in the *Application Instructions*.
- This form must be filled out using Microsoft Word and submitted as a Word or Adobe .pdf document. Paper applications will NOT be accepted.
- Signature pages should be scanned and attached as separate pages to each application.

## Submittal Checklist

### *Make sure*

- ✓ Application is complete, signed, and dated

### *Submit*

- ✓ Proof of agency status (template included in application packet)
- ✓ Ethnic and Racial Impact Statement
- ✓ Maintenance Plan (if submitting an application for preventive maintenance)

## A. ORGANIZATION INFORMATION

**Name of Organization: Salem Area Mass Transit District**

**Contact Person: Trish Bunsen**

**Address: 555 Court Street NE Ste. 5230**

**Telephone: 503.361.7531**

**Email: trisha.bunsen@cherriots.org**

**2017-2019 Section 5310(ODOT) Grant Application  
for Projects Located Within Marion and Polk Counties**

**Type of Organization (check one)**

Government Agency	<input type="checkbox"/>
Private Not-for-Profit	<input type="checkbox"/>
Other Public Transit District	<input checked="" type="checkbox"/>

**Area of service (check one)**

Inside Marion and Polk Counties	<input type="checkbox"/>
Outside Marion and Polk Counties	<input type="checkbox"/>
Both inside and outside Marion and Polk Counties	<input checked="" type="checkbox"/>

**Organization Days and Hours of Operation**

Day	Hours
Sunday	N/A
Monday	5:00 am-12:20 am
Tuesday	5:00 am-12:20 am
Wednesday	5:00 am-12:20 am
Thursday	5:00 am-12:20 am
Friday	5:00 am-12:20 am
Saturday	10:00am –4:00pm call center only
Please list any planned periods of service closure greater than 3 days (i.e., closed the week between Christmas Day and New Year's Day)	

**Total transportation program costs by year**

FY16 (historical data, if applicable) 38,878,585	FY17 (projected, if applicable) 42,178,000	FY18 \$45,974,020
---	---	----------------------

**B. PROJECT INFORMATION**

**Project Title** *(will be used for reviewer reference and in public comment process. Example: Mobility Management for XYZ volunteer driver program)*

Mobility Management
---------------------

**Project service area to be served** *(indicate the geographic features that define your service area such as streets, rivers, or jurisdictional boundaries)*

North boundary	
West boundary	
South boundary	
East boundary	
Other general geographic area (i.e., within the City of Woodburn)	Inside the Salem-Keizer Urban Growth Boundary in addition to the counties of Marion, Polk, and Linn

*Optional: please provide a map of your service area as a separate single page 8.5"x11"*



**2017-2019 Section 5310(ODOT) Grant Application  
for Projects Located Within Marion and Polk Counties**

attachment.

**Total Section 5310(ODOT) funds requested**

403,946
---------

**Start date**

July 1, 2017
--------------

**Funding request type (check one)**

Continuation of existing service at same level of service	<input checked="" type="checkbox"/>
Expansion of existing service	<input type="checkbox"/>
New service	<input type="checkbox"/>
Capital request	<input type="checkbox"/>
Other	<input type="checkbox"/>

**Project Service Types (check all that apply) What type of service will be supported with the 5310(ODOT) grant?**

A. Open to the general public at all times	<input checked="" type="checkbox"/>
B. Open only to seniors and individuals with disabilities	<input checked="" type="checkbox"/>
C. Demand response	<input type="checkbox"/>
D. Open to the general public on a space-available basis	<input type="checkbox"/>
E. Limited to defined clientele (i.e., residential home)	<input type="checkbox"/>
F. Deviated route	<input checked="" type="checkbox"/>
G. Other (commuter):	<input checked="" type="checkbox"/>

**Project Types (check all that apply) Select the project types that you wish to include in your application.**

A. Purchased service	<input type="checkbox"/>
B. Mobility Management	<input checked="" type="checkbox"/>
C. Replacement Vehicle(s)	<input type="checkbox"/>
D. Service Expansion and Right-sizing Vehicles	<input type="checkbox"/>
E. Capitalized Vehicle Preventive Maintenance	<input type="checkbox"/>
F. Equipment	<input type="checkbox"/>
G. Signs and Other Amenities	<input type="checkbox"/>
H. Passenger Shelters	<input type="checkbox"/>
I. Facilities (Bus Barns and Other Buildings)	<input type="checkbox"/>

**Scalable Section 5310(ODOT) Grant Request**

*You are strongly encouraged to request the full amount of funding that is needed for each project, including funding for new projects; however, funding is limited. Describe the scalability of your 5310(ODOT) funding request, how you scaled down your request and what aspects of the*

## 2017-2019 Section 5310(ODOT) Grant Application for Projects Located Within Marion and Polk Counties

*program would not be funded under this funding scenario below. Then enter your scaled down request amounts.*

**Scalability Description:**  
*Scalability of this work would be difficult without utilizing general fund dollars, which have not been budgeted for this work. Therefore, Salem-Keizer Transit is requesting the full amount only*

		FY18	FY19
Scaled request:	\$	\$	\$

**Identify the project’s additional sources of funding in the table below**

Estimated Additional Project Resources	
Source of Funds	Dollar Amount
2017-2019 Section 5310(ODOT) Grant Request ( <i>Important!</i> )	403,946
Local Resources	
Federal Resources	\$
Other (provide description): STF match funds	\$46,234
<b>Project Grand Total</b>	<b>\$450,180</b>

### Coordinated Plan

Is project derived from the *Cherriots Coordinated Public Transit – Human Services Transportation Plan* dated August, 2016?  Yes  No If yes, what page(s)? 68

If no, explain why the project is not part of the Coordinated Plan.

*For example: Is the project part of another plan (please name)? Is the plan still being finalized?*

### 1. Project Description

**a.) Describe services or capital investment to be provided by Section 5310(ODOT) funding.** Include a description of the following:

- Who you will serve?
- What geographic area you will serve?

## **2017-2019 Section 5310(ODOT) Grant Application for Projects Located Within Marion and Polk Counties**

- What level of service will be provided to customers?
- Operational activities; how will customers request and receive rides, including scheduling and dispatching?
- Describe if volunteers will be utilized to provide service and how this will occur (will the volunteer program be supported with 5310(ODOT) or other funds? Will you provide mileage reimbursement to volunteers using their own vehicles?).
- How will the service be marketed?

The purpose of this project is to coordinate and expand transportation services for seniors, people with disabilities and disadvantaged people within the Salem Keizer Urban Growth boundary and Marion and Polk counties. The project will facilitate and promote coordinated efforts to enhance the availability of, and access to, transportation services. This includes trip planning, management activities, researching best practices and developing programs to assist persons to overcome the barriers needed to utilize public transportation. Facilitating services includes evaluating customer needs and matching existing and potential riders with the services that are most appropriate to meet their transportation requirements. These services would go beyond the ADA requirements and be available to a much broader range of individuals. Training can be individualized for each person. Management activities include gathering and analyzing data to evaluate transportation service options for persons with disabilities and, to design the most efficient and cost effective option possible while supporting the “United we Ride” efforts.

Other programs may include “travel buddies” to mentor new riders, transit hosts to assist people on the transit mall ( current program operating through partnership with Garten Services) and on the spot training for those who learn best with one to one coaching.

Also included are the design, implementation, and coordination of educational programs to address community transportation needs and to inform the public of efficient ways to access existing transportation service. This includes outreach to senior centers, group training events for all populations, and digital outreach outlets of web, YouTube, and social media. This grant will provide funding to continue presentations on the benefits of mobility coordination. Activities will correspond with mobility management activities as described in Federal Transit Administration Section 5310 Circular 9070.1G or subsequent revisions.

Mobility Management is marketed through the promotion of transportation services and programs on social media channels; the web; targeted geographic location mailers; advertisements in local newspapers, and the promotion of transportation services and programs at informational tables and community presentation opportunities.

**b.) Will your project activities preserve existing service and/or provide new service?**

*Describe how the project preserves existing service or provides new or expanded service, limit 200 words*

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Preserve existing service

**c.) Will you coordinate between providers to avoid duplication?** *Describe what level of coordination between partners is done and how duplication is avoided, limit 200 words*

The Cherriots Call Center is a central clearinghouse for public transportation services within Marion and Polk Counties by booking requested trips on RED Line, CherryLift, and CARTS. The ability to book requested trips at one centralized location allows for easy coordination of services between providers, therefore eliminating duplication of services and provides a cost savings.

**d.) Is your project cost- effective?**

*Describe average cost per ride, cost per mile and cost per hour, limit 200 words*

Performance measures have been created for the ODOT Mobility Project. The Mobility Manager evaluates performance measures on a quarterly and annual basis. Measures are adjusted for quality and cost effectiveness.

The work plan includes four goals, eleven objectives, and fourteen outcomes. Costs associated with each activity were estimated to match the grant award. In addition, reporter roles were identified for each performance measure.

## 2017-2019 Section 5310(ODOT) Grant Application for Projects Located Within Marion and Polk Counties

### e.) Project Quality

Describe the **need** for this project. How was this need determined or assessed? Max 2,500 characters/approx. 400 words

The need for mobility management efforts is great due to seniors and individuals with disabilities gaining access to transportation services through travel training, transit hosts, which is included in Mobility Management efforts. Without these programs, there may be a barrier for seniors and individuals with disabilities to access transportation services.

### f.) Expected Outcomes

Describe the expected outcomes of this project on seniors and people with disabilities. Why is this project the best method to address the previously described need? Max 2,500 characters/approx. 400 words

Expected Outcomes:

- Greater awareness of availability and value of transit services in the community;
- public support for sustainable transportation and mobility management concepts;
- service offered to individuals is seamless;
- improved customer service;
- improvement in service effectiveness;
- increase in local investment in transit ridership;
- increase in ridership and productivity of existing services;
- increase in the numbers of stakeholders involved in regional coordinated public transportation planning for seniors and individuals with disabilities;
- increase in the number of public outreach events provided to engage stakeholders, our riders, and the general public;
- net increase in the numbers of people who have access to public transportation in order to gain access to jobs, school, medical facilities, shopping, and recreational locations;
- increases programs sustained by available grant programs;
- increases the number of service options available to seniors and individuals with disabilities in Marion and Polk Counties.

## 2. Project impact on four goals of transit

### a.) Describe the project's impact on access.

Access includes the ability of seniors and people with disabilities to travel to

**2017-2019 Section 5310(ODOT) Grant Application  
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*employment opportunities, community services, education, healthcare, etc., and to safely arrive at and depart their transit stop.*

Seniors and individuals with disabilities are provided access and mobility through transportation services and programs after they are informed and educated on public transportation options that they may or may not have known about previously through mobility management efforts such as presentations, hosted informational tables, and meetings attended. Seniors and individuals with disabilities are able to take the information on the transportation services and programs they learned and successfully access transportation to travel to employment opportunities, community services, education, and healthcare.

**b.) Describe the project's impact on availability.**

*Availability includes spatial availability (service close to me), time availability (service when I need it), and the size of the service area.*

Mobility Management efforts increases availability of projects by encouraging the development and implementation to enhance the availability of and access to transportation services and programs for seniors and individuals with disabilities.

**c.) Describe the project's impact on connectivity.**

*Connectivity includes the integration of services (routes, schedules, fare structures, information systems, modal transfer facilities.*

Mobility Management efforts impact connectivity by informing and educating seniors, individuals with disabilities, and supportive/advocates for these populations of transportation services and programs that provide access and mobility (connectivity) to routes, schedules, fare structures, travel training, and process to request trips.

**d.) Describe this project's impact on economic development.**

*Economic development includes public transportation's contribution to providing connections for workers to employers, reducing congestion, influencing land use choice and land values, and providing employment opportunities.*

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Mobility Management efforts are essential to providing mobility options for seniors and individuals with disabilities who need to access jobs, education, medical, shopping, and community events. These trips produce economic development for the region by providing mobility for seniors and individuals with disabilities who would otherwise just stay home and not spend money on goods and services in the region. Mobility Management provides education of the region's transportation services and programs to ensure mobility and access.

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**3. Project Budget**

Enter all costs involved in the **total** cost of the project.

Type	Amount
Labor (payroll), printing, office, marketing	429,600
Contracted services, travel ambassadors	37,000
Materials and supplies	\$
Operations	\$
Preventive maintenance	\$
Capital equipment	\$
Technology	\$
Other (describe)	\$
Other (describe)	\$
Other (describe)	\$
Other (describe)	\$
<b>Project Total</b> (right click and select "Update Field" to correct total)	\$466,600
Amount requested in this grant	\$403,946



**2017-2019 Section 5310(ODOT) Grant Application  
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4. Provide the timeline of the project in the following table

	<b>Step Description</b>	<b>Completion Date</b>
<b>1</b>	<b>Start service</b>	<b>July 1,2017</b>
<b>2</b>	<b>End Service</b>	<b>June 30, 2019</b>
<b>3</b>		
<b>4</b>		
<b>5</b>		
<b>6</b>		

5. Is your application for a replacement vehicle?

- Yes (continue to #6)     No (go on to Section C)

**2017-2019 Section 5310(ODOT) Grant Application  
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**6. Enter the following information about each vehicle to be replaced if the total cost of the vehicle is being requested:**

<b>Vehicle Category*</b>	<b>Qty (#)</b>	<b>Cost Each (\$)</b>	<b>Total (\$)</b>	<b>No. Seats w/ADA Deployed</b>	<b>No. of ADA Stations</b>	<b>Total Capacity</b>	<b>Fuel Type*</b>	<b>Estimated Order Date</b>	<b>Estimated Delivery Date*</b>
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
<b>Totals:</b>	<b>0</b>	<b>Grand Total:</b>	<b>0</b>						

**\*Vehicle Category Descriptions:** <http://www.oregon.gov/ODOT/PT/resources/guidance-library/vehicle-descriptions-usefullife-standards.pdf>

**\*Fuel Type Options:** (G) Gas, (D) Diesel, (B) Biodiesel, (HG) Hybrid-gas, (HD) Hybrid-diesel, (CNG) Compressed Natural Gas, (OF) Other alternative Fuel.


**\*Estimated Delivery Date:** Minimum 160 days if ADA accessible.


**2017-2019 Section 5310(ODOT) Grant Application  
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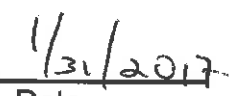
**C. ORGANIZATIONAL CERTIFICATION**

By submitting this document via email to Cherriots, I certify that the submitted materials and data included are complete, true and correct. Also, I certify that my organization is:

- Eligible to enter into agreements with Cherriots;
- Has the legal, managerial and operational capacity to do the work to be paid for by the Section 5310 Program;
- Not debarred or suspended from federal grants;
- In compliance with federal, state and local laws and regulations including, and not limited to, those pertaining to passenger transportation, civil rights, labor, insurance, safety and health, as applicable;
- Complies with the laws or rules of the Section 5310 Program;
- Properly uses and accounts for the Section 5310 Program's goals; and
- Will operate the project or service in a safe, prudent and timely manner.

  
Signature of Authorized Organization Officer

  
Title

  
Date

**2017-2019 Section 5310(ODOT)  
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Marion and Polk Counties**



# 2017-2019 Section 5310(ODOT) Grant Application for Projects Located Within Marion and Polk Counties

## INTRODUCTION

- Read the *2017-2019 Section 5310(ODOT) Grant Application Instructions* prior to completing this application.
- Each project submitted for funding consideration must have its own application.
- Selection criteria are detailed in the *Application Instructions*.
- This form must be filled out using Microsoft Word and submitted as a Word or Adobe .pdf document. Paper applications will NOT be accepted.
- Signature pages should be scanned and attached as separate pages to each application.

## Submittal Checklist

### *Make sure*

- ✓ Application is complete, signed, and dated

### *Submit*

- ✓ Proof of agency status (template included in application packet)
- ✓ Ethnic and Racial Impact Statement
- ✓ Maintenance Plan (if submitting an application for preventive maintenance)

## A. ORGANIZATION INFORMATION

**Name of Organization: Salem Area Mass Transit District**

**Contact Person: Trish Bunsen**

**Address: 555 Court Street NE Ste. 5230**

**Telephone: 503.361.7531**

**Email: trisha.bunsen@cherriots.org**

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**Type of Organization (check one)**

Government Agency	<input type="checkbox"/>
Private Not-for-Profit	<input type="checkbox"/>
Other Public Transit District	<input checked="" type="checkbox"/>

**Area of service (check one)**

Inside Marion and Polk Counties	<input type="checkbox"/>
Outside Marion and Polk Counties	<input type="checkbox"/>
Both inside and outside Marion and Polk Counties	<input checked="" type="checkbox"/>

**Organization Days and Hours of Operation**

Day	Hours
Sunday	N/A
Monday	5:00 am-12:20 am
Tuesday	5:00 am-12:20 am
Wednesday	5:00 am-12:20 am
Thursday	5:00 am-12:20 am
Friday	5:00 am-12:20 am
Saturday	10:00am –4:00pm call center only
Please list any planned periods of service closure greater than 3 days (i.e., closed the week between Christmas Day and New Year's Day)	

**Total transportation program costs by year**

FY16 (historical data, if applicable) 38,878,585	FY17 (projected, if applicable) 42,178,000	FY18 \$45,974,020
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**B. PROJECT INFORMATION**

**Project Title** *(will be used for reviewer reference and in public comment process. Example: Mobility Management for XYZ volunteer driver program)*

Purchased Service (CARTS, CherryLift, Red Line)
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**Project service area to be served** *(indicate the geographic features that define your service area such as streets, rivers, or jurisdictional boundaries)*

North boundary	
West boundary	
South boundary	
East boundary	
Other general geographic area (i.e., within the City of Woodburn)	Inside the Salem-Keizer Urban Growth Boundary in addition to the counties of Marion, Polk, and Linn

*Optional: please provide a map of your service area as a separate single page 8.5"x11"*

**2017-2019 Section 5310(ODOT) Grant Application  
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attachment.

**Total Section 5310(ODOT) funds requested**

1,184,256
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**Start date**

July 1, 2017
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**Funding request type (check one)**

Continuation of existing service at same level of service	<input checked="" type="checkbox"/>
Expansion of existing service	<input type="checkbox"/>
New service	<input type="checkbox"/>
Capital request	<input type="checkbox"/>
Other	<input type="checkbox"/>

**Project Service Types (check all that apply)** *What type of service will be supported with the 5310(ODOT) grant?*

A. Open to the general public at all times	<input checked="" type="checkbox"/>
B. Open only to seniors and individuals with disabilities	<input checked="" type="checkbox"/>
C. Demand response	<input checked="" type="checkbox"/>
D. Open to the general public on a space-available basis	<input type="checkbox"/>
E. Limited to defined clientele (i.e., residential home)	<input type="checkbox"/>
F. Deviated route	<input checked="" type="checkbox"/>
G. Other (commuter):	<input checked="" type="checkbox"/>

**Project Types (check all that apply)** *Select the project types that you wish to include in your application.*

A. Purchased service	<input checked="" type="checkbox"/>
B. Mobility Management	<input type="checkbox"/>
C. Replacement Vehicle(s)	<input type="checkbox"/>
D. Service Expansion and Right-sizing Vehicles	<input type="checkbox"/>
E. Capitalized Vehicle Preventive Maintenance	<input type="checkbox"/>
F. Equipment	<input type="checkbox"/>
G. Signs and Other Amenities	<input type="checkbox"/>
H. Passenger Shelters	<input type="checkbox"/>
I. Facilities (Bus Barns and Other Buildings)	<input type="checkbox"/>

**Scalable Section 5310(ODOT) Grant Request**

*You are strongly encouraged to request the full amount of funding that is needed for each project, including funding for new projects; however, funding is limited. Describe the scalability of your 5310(ODOT) funding request, how you scaled down your request and what aspects of the*

## 2017-2019 Section 5310(ODOT) Grant Application for Projects Located Within Marion and Polk Counties

*program would not be funded under this funding scenario below. Then enter your scaled down request amounts.*

**Scalability Description:**  
The funding supports only a portion of the CARTS, CherryLift, and RED Line services. Without funding services may be scaled back. The scaled request below reflects reduction of CherryLift services which has more funding support than the other transportation programs.

		FY18	FY19
Scaled request:	\$	\$590,782	\$590,782

**Identify the project’s additional sources of funding in the table below**

Estimated Additional Project Resources	
Source of Funds	Dollar Amount
2017-2019 Section 5310(ODOT) Grant Request ( <i>Important!</i> )	\$1,184,256
Local Resources STF	\$
Federal Resources FTA 5307 and 5310 for CherryLift and Red Line CS, ODOT 5311	\$1,313,684
Other (provide description): STF Match	\$800,924
<b>Project Grand Total</b>	<b>\$3,298,864</b>

### Coordinated Plan

Is project derived from the *Cherriots Coordinated Public Transit – Human Services Transportation Plan* dated August, 2016?  Yes  No If yes, what page(s)? 67

If no, explain why the project is not part of the Coordinated Plan.

*For example: Is the project part of another plan (please name)? Is the plan still being finalized?*

### 1. Project Description

**a.) Describe services or capital investment to be provided by Section 5310(ODOT) funding.** Include a description of the following:

- Who you will serve?
- What geographic area you will serve?



## **2017-2019 Section 5310(ODOT) Grant Application for Projects Located Within Marion and Polk Counties**

- What level of service will be provided to customers?
- Operational activities; how will customers request and receive rides, including scheduling and dispatching?
- Describe if volunteers will be utilized to provide service and how this will occur (will the volunteer program be supported with 5310(ODOT) or other funds? Will you provide mileage reimbursement to volunteers using their own vehicles?).
- How will the service be marketed?

## 2017-2019 Section 5310(ODOT) Grant Application for Projects Located Within Marion and Polk Counties

This project will fund a portion of contracted service costs for the CARTS, CherryLift, and Red Line. The purchased service will be provided by a contractor. The service, schedule, days, hours, and service type (demand responsive, fixed route or other) will be designed to meet the needs of seniors and individuals with disabilities. Budget includes a portion of contractor costs and administrative costs required to manage the service contract.

Chemeketa Area Regional Transportation Service (CARTS) provides deviated fixed route, flex route and dial-a-ride services in the rural areas of Marion and Polk Counties. The service is operated Monday through Friday from 6:00 AM to 8:00 PM. This service connects seniors, people with disabilities, low income, and the general public with 16 communities. Customers use CARTS to connect with employment, education, medical services, and social or recreational opportunities. CARTS operates five routes: Woodburn to Salem, Silverton to Salem, South Marion County to Salem, Polk County, and the Dallas Express to Salem. Additionally, two flex routes; one in Polk County and one in North Marion County. The routes are set up to spend 15 – 30 minutes in each community boarding and deboarding passengers and then travel to the next city, connecting rural communities along the way. Service is curb to curb and customers call the Cherriots Call Center formerly known as TripLink at least 24 hours prior to schedule a pick up. The South Marion dial-a-ride service connects four cities. The three dial-a-ride routes do not travel to Salem.

CherryLift is the complementary ADA paratransit service provided by Salem Area Mass Transit within the urban growth boundaries of Salem and Keizer. The funds will be used to support CherryLift Operations. Currently SAMTD contracts with MV Transportation to provide this service. CherryLift is an origin to destination service for people who are unable to use the Cherriots fixed-route bus service because of a disabling condition. An application process to determine eligibility is required. Service is provided Monday through Friday from 5:00 AM - 10:00 PM. The fare is \$3.20 for each ride. Reservations for a CherryLift ride can be made up to two weeks in advance and at least 24 hours before the needed ride. Reservations are made through the Cherriots Call Center which is also housed at SAMTD.

RED Line provides a shopper service and dial a ride service to seniors and people with disabilities within the urban growth boundaries of Salem and Keizer. RED Line operates shopping trips each day from various segments of the region. Customers call the Cherriots Call Center up to two weeks in advance to reserve their spot on the shuttle. RED Line picks customers up at their home and travels to a predetermined location. Shuttles provide service once in the morning and once in the afternoon from each region. Stores have been selected with criteria for one-stop services (groceries, pharmacy, household supplies) along with customer requests. Each area or neighborhood is provided approximately 75 minutes at the store in their region before returning home. On the return trip, RED Line bus operators will assist customers with their groceries. Examples of locations are Winco, Fred Meyer and Wal-Mart. Not only does this public service provide a necessary trip to the store, it also provides a social outlet to many who have limited means of transportation and are generally at home alone. This transportation is open to any senior or person with disability without a qualifying interview. RED Line service is for seniors age 60+ and persons with disabilities whom may or may not be eligible for ADA paratransit services, which may include low-income populations and senior housing communities. Also available is a Dial-A-Ride service. These trips can be reserved up to two weeks in advance; however same day requests are taken if room is available. RED Line is open Monday through Friday from 7:00 AM to 6:30 PM. RED Line observes the same holiday closures as Cherriots.

Transportation services are marketed through social media channels; the web; targeted geographic location mailers; advertisements in local newspapers, and the promotion of transportation services and programs at informational tables and community presentation opportunities.

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**b.) Will your project activities preserve existing service and/or provide new service?**

*Describe how the project preserves existing service or provides new or expanded service, limit 200 words*

Preserve existing service

**c.) Will you coordinate between providers to avoid duplication? Describe what level of coordination between partners is done and how duplication is avoided, limit 200 words**

The Cherriots Call Center provides coordination of transportation services inside the Cherriots service area for RED Line, CARTS, and CherryLift. The Call Center refers customers to other providers and public transportation outside the Cherriots service area.

Chemeketa Area Regional Transportation System (CARTS) provides public transportation service to rural Marion and Polk counties including the following communities: Salem, Woodburn, Gervais, Brooks, Mt. Angel, Silverton, Gates, Mill City, Lyons, Mehama, Stayton, Sublimity, Aumsville, Turner, Dallas, Monmouth, Independence, Dallas, and Rickreall. CARTS operates deviated fixed routes that travel to Salem and three regional dial-a-ride routes that remind in the region they serve.

**Cherrylift**

This service coordinates with Cherriots and CARTS. There are customers who are able to use Cherriots for some of their trips or portions of trip (classified as conditional eligibility) and then transfer to CherryLift. During incremental weather some customers may only be able to access CherryLift. Customers who qualify can ride CARTS from outside the area, then transfer to CherryLift while within the UBG.

**d.) Is your project cost-effective?**

*Describe average cost per ride, cost per mile and cost per hour, limit 200 words*

Cost per ride: CherryLift \$30.91, RED Line \$33.76, CARTS \$13.21

Cost per mile: CherryLift \$5.93, RED Line \$6.51, CARTS \$4.13

Cost per hour: CherryLift \$73.59, RED Line \$65.14, CARTS \$76.52

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**e.) Project Quality**

*Describe the **need** for this project. How was this need determined or assessed? Max 2,500 characters/approx. 400 words*

With CARTS services including deviated fixed route, flex route and dial-a-ride it provides a viable option for all demographic groups to connect with other communities and essential services. Other groups strongly served by CARTS are people traveling for school and work. The connections to the neighboring cities such as Salem and Woodburn afford rural community members opportunities to maintain employment and the ability to connect with necessary life enhancing services.

CherryLift provides public transit services to individuals who are unable to use the Cherriots fixed route system due to a disabling condition. An application process to determine eligibility is required. CherryLift connects customers with shopping, work and other activities. Cherriots collaborates with Marion County to provide CherryLift service for rehabilitation and work program for developmentally disabled individuals within the community.

RED Line provides public transportation for individuals with disabilities and senior citizens who may or may not be eligible for ADA paratransit and/or may or may not be able to access fixed route services. Many riders appreciate direct rides to services and shopping as opposed to accessing traditional fixed route services. The customer base often comments how RED Line gives them freedom to move within the community.

**f.) Expected Outcomes**

*Describe the expected outcomes of this project on seniors and people with disabilities. Why is this project the best method to address the previously described need? Max 2,500 characters/approx. 400 words*

## 2017-2019 Section 5310(ODOT) Grant Application for Projects Located Within Marion and Polk Counties

### CARTS

An expected outcome of the CARTS service is to provide access and mobility to seniors and individuals with disabilities that live and/or work outside of the Salem-Keizer Urban Growth Boundary. CARTS fills an unmet need for transportation services for seniors and individuals with disabilities in surrounding areas of Salem-Keizer. CARTS rural transportation is essential in connecting communities and people to work, school, shopping, medical appointments and other essential services

### CherryLift

An expected outcome of the CherryLift service is to provide access and mobility to seniors and individuals with disabilities that qualify for ADA paratransit services by completing a three step application process based on the individuals current functional ability to access fixed routes that may not otherwise have transportation options preventing them from accessing their community. CherryLift connects customers with shopping, work and other activities. Cherriots collaborates with Marion County to provide CherryLift service for rehabilitation and work program for developmentally disabled individuals within the community.

### RED Line

An expected outcome of the RED Line service is to provide mobility for those seniors and individuals with disabilities whom may or may not qualify for CherryLift and who cannot access Cherriots fixed-route buses. RED Line fills an unmet need for transportation for seniors and individuals with disabilities within the Salem-Keizer urbanized area.

## 2. Project impact on four goals of transit

### a.) Describe the project's impact on access.

*Access includes the ability of seniors and people with disabilities to travel to employment opportunities, community services, education, healthcare, etc., and to safely arrive at and depart their transit stop.*

CARTS, CherryLift, and RED Line transportation services provide transportation options for seniors and individuals with disabilities to access jobs, education, shopping, medical facilities, and recreational opportunities throughout the region.

### b.) Describe the project's impact on availability.

*Availability includes spatial availability (service close to me), time availability (service when I need it), and the size of the service area.*

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CARTS flex/dial-a-ride transportation services are available 8:00 am-5:00 pm Monday through Friday allowing riders access to community services, jobs, education, medical appointments, and shopping. CARTS, as with all Cherriots transit services does not operate on weekends.

CherryLift transportation service is available approximately 6:00 am to 10:30 pm Monday-Friday allowing qualifying riders access to community services, jobs, education, medical appointments, and shopping. CherryLift, as with all Cherriots transit services does not operate on weekends.

RED Line is available 7:00 am to 6:30 pm Monday through Friday and allows customers to access community services, jobs, education, medical appointments, and shopping. RED Line, as with all Cherriots transit services does not operate on weekends.

**c.) Describe the project's impact on connectivity.**

*Connectivity includes the integration of services (routes, schedules, fare structures, information systems, modal transfer facilities).*

Call Center staff is trained to take cues from the caller and then connect them to the appropriate transportation option of which CARTS, RED Line, and CherryLift transportation services are options. The connection to appropriate transportation options reduces duplication of services offered and increases reliability of existing services.

CARTS service coordinates with Cherriots fixed route service in Salem, the 1X service to Wilsonville, 2X service to Grand Ronde, Woodburn Transit, Canby Area Transit, Yamhill and the Silver Trolley in Silverton.

Cherriots collaborates with Marion County to provide CherryLift service for rehabilitation and work program for developmentally disabled individuals within the community.

**d.) Describe this project's impact on economic development.**

*Economic development includes public transportation's contribution to providing connections for workers to employers, reducing congestion, influencing land use choice and land values, and providing employment opportunities.*

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CARTS, CherryLift, and RED Line transportation services allows citizens to shop, access recreation, jobs, education, medical, and other community services in and around the Salem-Keizer areas. The transportation services promote spending within and around the local community by providing the means for seniors and individuals with disabilities to access these important community resources.

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**3. Project Budget**

Enter all costs involved in the **total** cost of the project.

Type	Amount
Labor (payroll)	\$
Purchased Service Carts, Redline, CherryLift	\$7,785,400
Materials and supplies	\$
Operations	\$
Preventive maintenance	\$
Capital equipment	\$
Technology	\$
Other (describe)	\$
Other (describe)	\$
Other (describe)	\$
Other (describe)	\$
<b>Project Total (right click and select "Update Field" to correct total)</b>	<b>\$7,785,400</b>
Amount requested in this grant	\$1,184,256



**2017-2019 Section 5310(ODOT) Grant Application  
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4. Provide the timeline of the project in the following table

	<b>Step Description</b>	<b>Completion Date</b>
<b>1</b>	<b>Start service</b>	<b>July 1, 2017</b>
<b>2</b>	<b>End Service</b>	<b>June 30, 2019</b>
<b>3</b>		
<b>4</b>		
<b>5</b>		
<b>6</b>		

5. Is your application for a replacement vehicle?

- Yes (continue to #6)     No (go on to Section C)

**2017-2019 Section 5310(ODOT) Grant Application  
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**6. Enter the following information about each vehicle to be replaced if the total cost of the vehicle is being requested:**

<b>Vehicle Category*</b>	<b>Qty (#)</b>	<b>Cost Each (\$)</b>	<b>Total (\$)</b>	<b>No. Seats w/ADA Deployed</b>	<b>No. of ADA Stations</b>	<b>Total Capacity</b>	<b>Fuel Type*</b>	<b>Estimated Order Date</b>	<b>Estimated Delivery Date*</b>
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
<b>Totals:</b>	<b>0</b>	<b>Grand Total:</b>	<b>0</b>						

**\*Vehicle Category Descriptions:** <http://www.oregon.gov/ODOT/PT/resources/guidance-library/vehicle-descriptions-usefullife-standards.pdf>

**\*Fuel Type Options:** (G) Gas, (D) Diesel, (B) Biodiesel, (HG) Hybrid-gas, (HD) Hybrid-diesel, (CNG) Compressed Natural Gas, (OF) Other alternative Fuel.

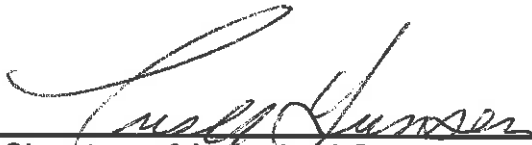
**\*Estimated Delivery Date:** Minimum 160 days if ADA accessible.


**2017-2019 Section 5310(ODOT) Grant Application  
for Projects Located Within Marion and Polk Counties**

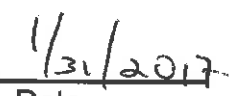
**C. ORGANIZATIONAL CERTIFICATION**

By submitting this document via email to Cherriots, I certify that the submitted materials and data included are complete, true and correct. Also, I certify that my organization is:

- Eligible to enter into agreements with Cherriots;
- Has the legal, managerial and operational capacity to do the work to be paid for by the Section 5310 Program;
- Not debarred or suspended from federal grants;
- In compliance with federal, state and local laws and regulations including, and not limited to, those pertaining to passenger transportation, civil rights, labor, insurance, safety and health, as applicable;
- Complies with the laws or rules of the Section 5310 Program;
- Properly uses and accounts for the Section 5310 Program's goals; and
- Will operate the project or service in a safe, prudent and timely manner.

  
Signature of Authorized Organization Officer

  
Title

  
Date

# **Vehicle and Equipment Maintenance Plan**

*Updated: April 2016*

The maintenance department of the Salem Area Mass Transit District is responsible for all aspects of maintaining, servicing, and cleaning of buses and support vehicles for transit services in the Salem Keizer, Oregon area. The department is also responsible for the upkeep and repair of district equipment and facilities, including bus stop signs and passenger shelters. The maintenance department strives to provide safe, reliable, and clean buses, using the most efficient and cost-effective maintenance practices, products, and personnel resources.

The primary elements of the maintenance department's function and the means by which it satisfies its responsibilities are described in the body of this report, as well as descriptions of specific methods and procedures. As can be seen, the department continually seeks to improve operations, equipment, employee performance, and cost savings; thereby, providing the best possible service to the public.

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## **Maintenance Goal**

To provide efficient and economical maintenance and housekeeping services to allow the fleet, facilities, and support equipment to be used for their intended purposes.

## **Maintenance Objectives**

Complete major vehicle repairs based upon most reliable life cycle at the lowest cost.

Identify, design and incorporate improvement projects to reduce and minimize total operating and maintenance costs.

Operate the facility utilities and fleet in the most economical manner while providing a high level of reliability.

Provide a method for easy and complete reporting and identification of necessary repairs and maintenance work.

Maintain the proper level of spare parts and supplies to support timely maintenance and repairs.

Accurately track the cost of all maintenance work.

Schedule all planned work in advance, and allocate and anticipate staff requirements to meet planned and unplanned events.

Monitor the progress of all maintenance work to successful completion.

Maintain complete historical data concerning the facilities in general and equipment and components in particular.

Continually seek workable engineering and technological solutions to maintenance problems.

Perform daily housekeeping and cleaning functions to maintain safe, efficient, and properly presentable facilities.

Promptly respond to and repair minor problems in the facilities.

Maintain bus stops and shelters in a manner that provides a clean, attractive, and safe area for customers.

## **Bus Stops & Shelters**

The District currently has 650 bus stop signs and 145 passenger shelters in place in our service area. Bus stops and shelters are located, installed, and maintained in consideration of the District's passengers' comfort and convenience.

Graffiti and vandalism to the District's bus stops and shelters is removed or repaired as soon as it is reported. Incidents of damage or vandalism are reported to the dispatch office by bus Operators, Operations Supervisors, other agencies, or the public. These reports generate a work order that is logged into a database to track repairs and costs; the report is given to the maintenance department for removal or repair within five working days. Repairs for damage to signs or shelters that may cause harm to the public are begun as soon as reported. The type and extent of the vandalism will determine the approach that is taken to remove or repair such vandalism. Paint and pen graffiti can be removed immediately by an Operations Supervisor, or by the maintenance division's shelter cleaning crew that is in the field daily performing scheduled cleaning and trash removal duties. Paint and pen graffiti can be removed with spray vandal mark remover. Etching of shelter panels may be removed by sanding. Broken or damaged panels are removed as soon as practicable to eliminate the possibility of public injury due to sharp or hazardous edges.

## Fleet Description

Salem Area Transit has a current active fleet size of 61 fixed route (Cherriots) buses, 45 para transit (Cherrylift) buses, 15 rural route (CARTS) buses, 5 REDLine vehicles and 12 support vehicles. It is projected that the District will provide an estimated 3.2 million miles of service in fiscal 2015/2016. The District's fleet has a current average age of 10.5 years.

The peak requirement for Cherriots is 51 buses, 37 Cherrylift buses, 11 CARTS buses and 4 REDLine vehicles. All fleet compositions allow for an FTA approved 20% spare ratio. 3 buses currently reside in the Inactive Reserve (Contingency) fleet for Cherriots.

Revenue Fleet Composition including Contingency fleet (as of April 11th, 2016):

### Fleet Composition w/ Mileage (Active & Contingency Fleets through April 11th, 2016)

Qty	Fleet Description	Bus No's	Average Mileage	Highest Mileage	Lowest Mileage
12	2003 Orion VII 35' CNG	101 - 112	449,575	455,029	445,055
9	2003 Orion VII 40' CNG	201-206, 210-212	432,986	404,385	444,201
2	2004 Orion VII Commuter	213 – 214	421,462	421,967	420,957
8	2005 Orion VII 40' CNG	215 – 222	377,314	389,362	348,389
10	2008 Gillig 35'	113 – 122	295,040	493,344	274,658
4	2008 Gillig 40'	223 – 226	260,666	262,046	258,526
8	2011 Gillig 40'	227 – 234	272,724	207,181	193,888
4	2011 Gillig 35'	123 – 126	196,441	200,766	190,43
4	2012 Gillig 35'	127 – 130	180,145	180,676	179,317
3	2003 Orion VII 40' CNG (CONT)	207-209	409,712	423,701	378,078
	<b>CherryLift</b>				
4	2007 Ford E-450	857-861	169,356	179,289	166,182
5	2008 Ford E-450	827-831	201,896	219,249	188,562
2	2009 Ford E-450	832-833	156,508	153,056	160,060
4	2010 Ford E-450	834-837	147,250	149,640	145,054
17	2011 Ford E-350	838-854	121,866	150,216	116,643
4	2013 Chevrolet Arboc	862-865	52,364	61,780	39,427



Salem-Keizer Transit Maintenance Plan  
 April 2016

7	2014 Ford MV-1	1401-1407	15,501	32,298	15,501
1	2008 Chevrolet Uplander	1502	65,247	65,247	65,247
	<b>REDLine</b>				
2	2012 Ford E-350	503-503	139,671	150,006	129,337
1	2013 Ford E-350	504	42,160	42,160	42,160
2	Dodge Caravan	550-551	15,432	17,091	13,773

**Budget**

The operating budget of the Maintenance Division is approximately 25% of the District's operating budget. The Maintenance Division budget is planned and supported with sound economic analysis. Changes in maintenance budget requirements for such items as diesel fuel, parts, and tires are fully illustrated in cost per mile and adjusted for anticipated price increases.

## **Software Programs**

The Maintenance Division currently operates using FleetNet for its fleet maintenance and parts inventory control. It also interfaces to our run cutting software Trapeze. The Maintenance Division also uses FleetNet to compile and generate reports to compute budgetary and expense information, track road call summaries and for tracking mileage data.

The District uses FuelForce for vehicle fueling which allows an authorized employee to use an assigned card or their employee number to complete a fueling transaction.

## **Labor Force**

The Maintenance Division currently has a staff of 31 persons that include: Division Manager, Vehicle Maintenance Supervisors, a Facilities Maintenance Supervisor, Journey Mechanics, Service Technicians, Service Workers, Facilities Maintenance Workers, a Procurement Assistant, a Parts and Supplies Clerk, and a Staff Assistant. Division personnel may work any of 4 shifts over a five-day period, performing varied tasks.

Specifically:

- (1) Maintenance Manager
- (1) Facilities Maintenance Supervisor
- (2) Vehicle Maintenance Supervisors
- (9) Journey Mechanics
- (5) Service Technicians
- (6) Service Workers
- (2) Facilities Maintenance Workers
- (1) Parts and Supplies Clerk
- (1) Purchasing Agent
- (1) Staff Assistant

## **Employee Performance**

The District has an annual performance appraisal program using forms that are periodically revised to better address performance criteria and to improve the quality of the appraisal. Training is also provided to the supervisors to assist them in the process and outcome. The District subscribes to a positive corrective action approach, as well as a progressive discipline program in addressing performance deficiencies. Employees are recognized and rewarded for system-improving suggestions and ideas.

Training is regarded as an essential element in our effort to improve maintenance productivity. Maintenance training is directed toward developing and upgrading skills necessary for proper vehicle maintenance, equipment modification, system procedures, and new equipment orientation. The program also focuses on management to enhance leadership skills and supervisory practices to increase productivity levels and maintain a responsible maintenance environment. In-house training consists of both classroom and on-the-job training. Equipment and product vendors periodically hold seminars and training sessions at SKT's facility.

## **Maintenance Procedures**

### ENGINES

- All engine maintenance is done in conformance with the manufacturer's recommendations or sooner based upon oil sampling.
- Oil and filter changes are done at 6,000 miles on Orion VII and Gillig buses.
- Major engine components are overhauled or replaced on an as needed basis.

## TRANSMISSIONS

- Transmissions:
  - Allison B400-R [Orion VII]
  - Voith DIWA .5
- Repair work is performed in conformance with the manufacturer's recommendations.
- Major overhaul is completed as needed with an average of 300,000 miles.
- Other repairs are completed as needed, or at manufacturer's suggestion.
- Preventative Maintenance Services are performed at the following intervals.
- Filter and fluid exchange at 72,000. Fluid samples are taken every 18,000 miles.

## BRAKES

- Preventative Maintenance Inspections are performed on brakes every 6,000 miles.
- Brake efficiency is checked with an electronic brake de-accelerometer after any brake repair work and for driver complaints. There must be a 50% efficiency rate at 20> MPH.
- Application valve, parking brake valve, and relay valves are checked for leaks and performance at 6,000 mile intervals and rebuilt or replaced as needed.
- Moisture ejector valve is rebuilt and desiccant cartridge is changed as needed.
- Major brake overhaul intervals occur at an average of every 100,000 miles because buses are equipped with retarders. Overhauls include the following:
  - Relining
  - Drums turned
  - All seals replaced
  - Worn and damaged components checked and replaced
  - S-Cam and bushings inspected and replaced as necessary
  - Wheel bearings cleaned and repacked and new seals installed
  - Bus is test driven and checked with brake meter.
  - Non-asbestos lining is used on all relining.

### DIFFERENTIALS

- Done in conformance with manufacturer's suggested service intervals.
- Gear oil changed at 72,000 PM.
- Life expectancy at 350,000 miles.

### SERVICING AND CLEANING COACHES

- Oil and anti-freeze levels checked nightly.
- Fueling done nightly.
- Coach swept out while fueling.
- Interior/exterior lights checked.
- Tires checked for under-inflation by thump method nightly.
- Buses are highlighted approximately every other night. Highlighting consists of wiping down dash, handrails, seats, and dust from windows.
- Buses are thoroughly cleaned on a 15-30 day cycle.

### PREVENTATIVE MAINTENANCE INSPECTIONS

A preventative maintenance program has been developed that incorporates a cycle of A, B, C and D inspections at 6,000 (A), 18,000 (B), 36,000 (C) and 72,000 (D) miles. The majority of the inspections are performed at night so as not to affect daily service. 3,000 mile intervals are adhered to for all non-revenue service vehicles.

Oil samples are taken at each oil change. In addition, brakes are checked, lubrication is performed, and defects are referred to the shift supervisor or lead person for repairs.

The department's performance in terms of inspections completed on time verses inspections scheduled is monitored on a daily, weekly, and monthly basis. A 10% tolerance is applied to the mileage intervals between inspections for consideration as being performed "On Time."

### MOBILITY DEVICES.

All vehicle wheelchair lifts and ramps are inspected during every PM inspection. Roll stops, interlocks, pivot points and fasteners, hoses, fittings, connections and warning systems are checked for defects. The entire system is tested and cycled to ensure proper operation.

### RESTRAINTS

All vehicles are equipped with a Q-Straint 4 point wheelchair restraint system.

### COOLING SYSTEM

Cooling systems are maintained by providing a source of anti-freeze and water in the bus wash for topping up as needed.

The coolant is changed on a 2 year cycle assuring the coolant is at the proper protection level using both anti-freeze and an additive package. Coolant filters permeated with Nalcool are utilized.

Repairs to the systems are on an as-needed basis. Adding to the cooling systems is monitored by the fueling sheets, which indicate coolant usage by coach on a daily basis.

### OIL SAMPLING

Oil samples are taken at each oil change. In addition to determining oil and filter service intervals, sampling provides specific data on the levels of contamination present, such as coolant, soot, or high metal content.

Transmission and differential samples are taken if problems are suspected.

The most recent result of sampling is studied by management and placed in a file for each engine. Appropriate preventative steps are taken, and repairs are performed as necessary.

Sampling of bulk supplies at the time of delivery is taken periodically to ensure quality and consistency.

### ELECTRICAL COMPONENT REBUILD

Electrical components are rebuilt on an as needed basis or as bench work, time permitting. Starters, motors, relay boards--are checked to determine what is needed. P.C. boards are repaired or replaced as needed. Typically, alternators and starters are sent out for rebuild. Armatures are turned and cleaned, brushes are replaced, coils are repaired or replaced, and new bearings and seals are installed.

### FAREBOX MAINTENANCE

Electronic registering fareboxes are regularly maintained and repaired as needed. A designated area is equipped with the necessary electronic repair equipment to do all repairs and adjustments in-house. Fareboxes are probed each night and cashboxes emptied twice a week. Maintenance reports are monitored for problems.

### COMMUNICATONS, ELECTRONICS & SECURITY EQUIPMENT

All buses in the fleet are equipped with Digital Recorder (DRI) Voice Announcement Systems, an automatic announcement system, triggered by GPS technology.

All buses except are equipped with surveillance cameras to record activity within the coach. The system has an 'event' button which preserves a recorded period, as well as an impact sensor.

Setup and troubleshooting is performed as the new buses arrive. Subsequent repairs are performed on an as-needed basis, with the aid of Original Equipment Manufacturers (OEM) and by qualified in-house staff.

### UPHOLSTERY REPAIR

Seat coverings are repaired on an as needed basis. Graffiti is removed immediately upon discovery. The Maintenance Department performs all repairs and re-upholsters in-house.

### BUS TOWING

Emergency repairs are made at the site of failure if the responding mechanic determines it can be done safely and efficiently.

All towing is done by an outside towing service.



### Daily Vehicle Inspections (DVI)

DVI books are supplied on all buses. There are 2 books on each bus. 1 book reflects the prior 30 day pre and post trips along with defects that have repairs signed by maintenance staff. The 2<sup>nd</sup> book is the current book that contains the most recent defects and repairs.

DVIs are delivered to the maintenance facility nightly after the runs are completed. All write ups are checked out before the bus is returned to service. Depending upon the severity some may be repaired immediately while others may be deferred to a later date or determined unjustified.

DVIs are filed for reference and retained in accordance with the archive retention schedule.

A process has been developed that allows Maintenance to correspond to the operators on all repairs completed.

### TIRES

The District currently has a tire lease agreement with Michelin. These agreements include tires for the Cherriots and CherryLift service.

The Maintenance Division personnel perform all mounting, dismounting, and minor repairs to the tires. The tires are branded with an identifying number that is used to track the tire throughout its life using the FleetNet tire module. Air pressure and tread wear checks are performed weekly on the fleet.

#### Front

Tires are removed at 8/32" to use at a rear tire position.

4/32" tread depth minimum on any major tread groove on front axle.

A front end alignment is performed whenever abnormal tire wear exists.

Toe in is checked every 36,000 miles.

These tire casings are recapped once and used on the rear.

#### Rear

2/32" tread depth minimum on any major tread groove on the rear axle.

Sidewalls are monitored for curb scuffing.

## TIRES – Cont'd

Tire pressure, Wear, and Tread depth

Each week every tire is checked.

Minimum tire pressure is maintained for maximum tire life as recommended by tire manufacturer.

### Wheels

Checked for cracks during mounting and painting.

Sandblasted, inspected, and repainted when a new tire is installed.

## INVENTORY AND PARTS

The parts inventory consists of approximately 2,700 different line items.

Inventory is stocked in five locations:

- Parts room for smaller, fast moving items
- Receiving area for large, bulky items
- Tire room for tires and wheels
- Mezzanine area for body panels, glass, and slow moving items
- Maintenance shop and Fuel Island for oil and anti-freeze barrels

Parts are recorded in inventory and the computerized inventory system by:

- Major component classification
- Part number
- Location
- Bin location

Physical inventory is taken at the end of each fiscal year. Physical inventory counts are hand written on computer-generated count sheets by location. A transit employee who is not a member of the counting team then enters the counts into the computer. Upon completion of the physical inventory, a computer printout is made of the total parts inventory valuation. This inventory valuation, together with the original count sheets and "issued/receipts" location sheets, are turned into the Business Services Division. The Business Services Division, which has kept a separate inventory count during the year, then reconciles and makes the necessary adjustments. This process is done in June of each year, and is monitored by an auditor who ensures the validity and accuracy of the inventory process and its resulting figures.

### Parts Issues

All parts issues are entered into the computerized inventory system. The Repair Order form provides the data for entering parts issues as well as labor associated with the vehicle repairs. The parts inventory is automatically adjusted by charging out the part from the inventory to the repair order. This is done by data entry in the Fleetmate computer program. The labor hour portion of the repair order records all labor segments for each repair performed, thereby completing the total repair cost on that repair order.

### Parts Receipts

The District purchase order with the vendor packing slip, or invoice, provides the necessary data for the parts receipt transaction. Information included on these documents includes:

- Vendor name
- Date of Order
- Date received
- Part number
- Quantity
- Unit cost
- Total cost

The date parts are received is noted on the packing slip, as well as the receiving clerk's signature.

### Shop Purchasing

A District purchase order is issued to procure shop parts, goods and services. The purchase order is coded with an appropriate divisional budget number for each item procured. All procurement action is initiated by a requisition, which is reviewed and approved by the Maintenance Manager.

For individual parts, goods and/or services in excess of \$2,000.00, at least three supplier quotations must be solicited and submitted with an approved requisition prior to approval of a purchase order. The criteria used in soliciting quotes for maintenance shop parts and supplies are: best quality, best cost, timely delivery. Prior to any purchase, all applicable supplier catalogs are consulted.

Diesel and gasoline fuel is purchased via spot pricing using 4 different fuel vendors. Diesel and gasoline purchases are made on an as needed basis.

## Warranty Procedures

Warranty claims vary by supplier and the nature of the product. Claims are processed in a variety of ways: warranty service orders, phone calls, faxes, and meetings with supplier representatives, until a satisfactory settlement has been received. Warranty claims are recorded prior to submission to the manufacturer.

While most repairs are performed by the manufacturer's staff or by other qualified representatives, SAMTD's maintenance staff tracks labor hours for work they perform on warranty items. The manufacturer typically supplies replacement parts.

Typical warranties include:

- Propulsion Systems
  - Engines
  - Transmissions
  
- Major Subsystems
  - Wheelchair Ramps, Dryers, and Door Systems
  - Axles, Brake Systems, Heating, Ventilation & Air Conditioning,
  - Air Compressors & Starters/Alternators
  - Destination Signs, Digital Recorders, Radios
  - Surveillance Cameras

**2017-2019 Section 5310(ODOT)  
Grant Application  
for Projects Located Within  
Marion and Polk Counties**



**2017-2019 Section 5310(ODOT) Grant Application  
for Projects Located Within Marion and Polk Counties**

**INTRODUCTION**

- Read the *2017-2019 Section 5310(ODOT) Grant Application Instructions* prior to completing this application.
- Each project submitted for funding consideration must have its own application.
- Selection criteria are detailed in the *Application Instructions*.
- This form must be filled out using Microsoft Word and submitted as a Word or Adobe .pdf document. Paper applications will NOT be accepted.
- Signature pages should be scanned and attached as separate pages to each application.

**Submittal Checklist**

***Make sure***

- ✓ Application is complete, signed, and dated

***Submit***

- ✓ Proof of agency status (template included in application packet)
- ✓ Ethnic and Racial Impact Statement
- ✓ Maintenance Plan (if submitting an application for preventive maintenance)

**A. ORGANIZATION INFORMATION**

**Name of Organization: City of Silverton**

**Contact Person: Jason Gottgetreu**

**Address: 306 South Water Street, Silverton OR 97381**

**Telephone: 503-874-2212**

**Email: Jgottgetreu@silverton.or.us**

**2017-2019 Section 5310(ODOT) Grant Application  
for Projects Located Within Marion and Polk Counties**

**Type of Organization (check one)**

Government Agency	<input checked="" type="checkbox"/>
Private Not-for-Profit	<input type="checkbox"/>
Other	<input type="checkbox"/>

**Area of service (check one)**

Inside Marion and Polk Counties	<input checked="" type="checkbox"/>
Outside Marion and Polk Counties	<input type="checkbox"/>
Both inside and outside Marion and Polk Counties	<input type="checkbox"/>

**Organization Days and Hours of Operation**

Day	Hours
Sunday	
Monday	9:00 am to 5 pm
Tuesday	9:00 am to 5 pm
Wednesday	9:00 am to 5 pm
Thursday	9:00 am to 5 pm
Friday	9:00 am to 5 pm
Saturday	9:00 am to 3:30 pm
Please list any planned periods of service closure greater than 3 days (i.e., closed the week between Christmas Day and New Year's Day)	

**Total transportation program costs by year**

FY16 (historical data, if applicable)	FY17 (projected, if applicable)	FY18
130,650	\$130,647	\$130,648

**B. PROJECT INFORMATION**

**Project Title** (will be used for reviewer reference and in public comment process. Example: *Mobility Management for XYZ volunteer driver program*)

Silver Trolley Preventive Maintenance
---------------------------------------

**Project service area to be served** (indicate the geographic features that define your service area such as streets, rivers, or jurisdictional boundaries)

North boundary	Hobart Road
West boundary	Westfield Street
South boundary	Pioneer Drive
East boundary	Monitor Road
Other general geographic area (i.e., within the City of Woodburn)	Within the Urban Growth Boundary of Silverton

*Optional: please provide a map of your service area as a separate single page 8.5"x11"*

**2017-2019 Section 5310(ODOT) Grant Application  
for Projects Located Within Marion and Polk Counties**

attachment.

**Total Section 5310(ODOT) funds requested**

\$11,500

**Start date**

July 1, 2017

**Funding request type (check one)**

Continuation of existing service at same level of service	<input checked="" type="checkbox"/>
Expansion of existing service	<input type="checkbox"/>
New service	<input type="checkbox"/>
Capital request	<input type="checkbox"/>
Other	<input type="checkbox"/>

**Project Service Types (check all that apply) *What type of service will be supported with the 5310(ODOT) grant?***

A. Open to the general public at all times	<input type="checkbox"/>
B. Open only to seniors and individuals with disabilities	<input type="checkbox"/>
C. Demand response	<input checked="" type="checkbox"/>
D. Open to the general public on a space-available basis	<input type="checkbox"/>
E. Limited to defined clientele (i.e., residential home)	<input type="checkbox"/>
F. Deviated route	<input type="checkbox"/>
G. Other (define):	<input type="checkbox"/>

**Project Types (check all that apply) *Select the project types that you wish to include in your application.***

A. Purchased service	<input type="checkbox"/>
B. Mobility Management	<input type="checkbox"/>
C. Replacement Vehicle(s)	<input type="checkbox"/>
D. Service Expansion and Right-sizing Vehicles	<input type="checkbox"/>
E. Capitalized Vehicle Preventive Maintenance	<input checked="" type="checkbox"/>
F. Equipment	<input type="checkbox"/>
G. Signs and Other Amenities	<input type="checkbox"/>
H. Passenger Shelters	<input type="checkbox"/>
I. Facilities (Bus Barns and Other Buildings)	<input type="checkbox"/>

**Scalable Section 5310(ODOT) Grant Request**

*You are strongly encouraged to request the full amount of funding that is needed for each project, including funding for new projects; however, funding is limited. Describe the scalability of your 5310(ODOT) funding request, how you scaled down your request and what aspects of the*



**2017-2019 Section 5310(ODOT) Grant Application  
for Projects Located Within Marion and Polk Counties**

program would not be funded under this funding scenario below. Then enter your scaled down request amounts.

*Scalability Description: The request is for preventive maintenance for the three vehicles that operate the Silver Trolley. Scaling down maintenance is somewhat problematic as forgoing maintenance such as oil changes and replacing the brakes and tires on a public transit vehicle is not in the public interest.*

	FY17	FY18	FY19
Scaled request:	\$	\$5,000	\$5,000

**Identify the project's additional sources of funding in the table below**

<b>Estimated Additional Project Resources</b>	
<b>Source of Funds</b>	<b>Dollar Amount</b>
2017-2019 Section 5310(ODOT) Grant Request ( <i>Important!</i> )	\$11,500
Local Resources	\$69,500
Federal Resources	\$140,295
Other (provide description): STF	\$40,000
<b>Project Grand Total</b>	<b>\$261,295</b>

**Coordinated Plan**

Is project derived from the *Cherriots Coordinated Public Transit – Human Services Transportation Plan* dated August, 2016?  Yes  No If yes, what page(s)?

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If no, explain why the project is not part of the Coordinated Plan.

*For example: Is the project part of another plan (please name)? Is the plan still being finalized?*

**1. Project Description**

**a.) Describe services or capital investment to be provided by Section 5310(ODOT) funding.** Include a description of the following:

- Who you will serve? The Silver Trolley is operated by the City of Silverton's Community Development Department and provides demand responsive (dial-a-ride) curb-to-curb service for the senior, disabled, special needs, youth, economically disadvantaged, and the general public.

**2017-2019 Section 5310(ODOT) Grant Application  
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- What geographic area you will serve? The Silver Trolley operates in the City of Silverton's city limits and associated urban growth boundary with a few exceptions on a case by case basis.
- What level of service will be provided to customers? The Silver Trolley provides free curb-to-curb service; drivers wait for an individual at the curb of a public street, in front or close to the rider's house, building, or other designated pick-up location as possible. For passenger drop offs, the driver drops the rider off at the sidewalk, or another safe waiting area next to the curb of a public street, in front or as close to the designated drop off location as possible.
- Operational activities; how will customers request and receive rides, including scheduling and dispatching? Dispatch is available for ride scheduling Monday through Friday from 8:00 AM to 5:00 PM (Dispatchers will not be available to answer phones on Saturdays so all trips need to be made by Friday). There is 24 hour voicemail service available for after hour calls or if the line is busy. Dispatchers shall route and schedule each trip request at the time the reservation is made. Ride confirmation and "ready times" will be given to the rider. When at capacity, alternative times and/or days can be arranged, or the trip may be denied. Riders should expect the Trolley vehicle within 30 minutes of the arranged time (15 minutes before and 15 minutes after the scheduled time).
- Describe if volunteers will be utilized to provide service and how this will occur (will the volunteer program be supported with 5310(ODOT) or other funds? Will you provide mileage reimbursement to volunteers using their own vehicles?). Volunteers are not utilized.
  - How will the service be marketed? Silver Trolley brochures (available in English and Spanish) to educate citizens about the Silver Trolley services.

**b.) Will your project activities preserve existing service and/or provide new service?**

*Describe how the project preserves existing service or provides new or expanded service, limit 200 words*

The project is to preserve existing services. Preventative Maintenance assures the Trolleys are continuously in safe work order. The activity preserves the existing service by ensuring the City has safe vehicles in which to operate the demand response service.

**c.) Will you coordinate between providers to avoid duplication? Describe what level of coordination between partners is done and how duplication is avoided, limit 200 words**

**2017-2019 Section 5310(ODOT) Grant Application  
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Riders of the Silver Trolley can coordinate their ride with CARTS (Chemeketa Area Regional Transportation System) to connect Silverton to the communities of Salem, Woodburn, Mt. Angel, Hubbard, Gervais, and other neighboring communities in between.

**d.) Is your project cost-effective?**

*Describe average cost per ride, cost per mile and cost per hour, limit 200 words*

The City recently switched to a certified mechanic to handle the implementation of the Silver Trolley Vehicle Maintenance Plan. This was in response to a compliance review conducted by ODOT. While this has increased the cost of maintenance, it has ensured a higher level of maintenance and accountability. The average cost per ride is \$13.75 with the average cost per mile being \$7.50, and the average cost per hour being \$49.40.

**e.) Project Quality**

*Describe the **need** for this project. How was this need determined or assessed? Max 2,500 characters/approx. 400 words*

Preventative maintenance is a required element of operating transit system both for practice reasons and to be in compliance with federal grant requirements.

**f.) Expected Outcomes**

*Describe the expected outcomes of this project on seniors and people with disabilities. Why is this project the best method to address the previously described need? Max 2,500 characters/approx. 400 words*

The expected outcome is to be able to continue to operate the Silver Trolley in a safe and effective manner.

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**2. Project impact on four goals of transit**

**a.) Describe the project's impact on access.**

*Access includes the ability of seniors and people with disabilities to travel to employment opportunities, community services, education, healthcare, etc., and to safely arrive at and depart their transit stop.*

The project is necessary to ensure the safety and operational effectiveness of the Silver Trolley fleet which provides service to seniors and people with disabilities to travel to employment opportunities, community services, education, healthcare, etc., and to safely arrive at and depart their transit stop. Safe and functional vehicles are a primary component to provide access.

**b.) Describe the project's impact on availability.**

*Availability includes spatial availability (service close to me), time availability (service when I need it), and the size of the service area.*

Ensuring the Silver Trolley vehicles are up and running provides time availability security.

**c.) Describe the project's impact on connectivity.**

*Connectivity includes the integration of services (routes, schedules, fare structures, information systems, modal transfer facilities).*

The Trolley does not have routes nor does it require a fare. Having all three vehicles constantly ready for service ensures full schedule coverage.

**d.) Describe this project's impact on economic development.**

*Economic development includes public transportation's contribution to providing connections for workers to employers, reducing congestion, influencing land use choice and land values, and providing employment opportunities.*

Having a functional transit service allows employees to utilize the service to travel to work and also allows residents with limited mobility access to local businesses to utilize the services provided.

**2017-2019 Section 5310(ODOT) Grant Application  
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**3. Project Budget**

Enter all costs involved in the **total** cost of the project.

Type	Amount
Labor (payroll)	\$219,795
Contracted services	\$
Materials and supplies	\$30,000
Operations	\$
Preventive maintenance	\$11,500
Capital equipment	\$
Technology	\$
Other (describe)	\$
Other (describe)	\$
Other (describe)	\$
Other (describe)	\$
<b>Project Total (right click and select "Update Field" to correct total)</b>	\$261,295.00
Amount requested in this grant	\$11,500

**2017-2019 Section 5310(ODOT) Grant Application  
for Projects Located Within Marion and Polk Counties**

**4. Provide the timeline of the project in the following table**

	<b>Step Description</b>	<b>Completion Date</b>
<b>1</b>	<b>Silver Trolley Operations</b>	<b>On Going</b>
<b>2</b>		
<b>3</b>		
<b>4</b>		
<b>5</b>		
<b>6</b>		

**5. Is your application for a replacement vehicle?**

Yes (continue to #6)     No (go on to Section C)

**2017-2019 Section 5310(ODOT) Grant Application  
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**6. Enter the following information about each vehicle to be replaced if the total cost of the vehicle is being requested:**

<b>Vehicle Category*</b>	<b>Qty (#)</b>	<b>Cost Each (\$)</b>	<b>Total (\$)</b>	<b>No. Seats w/ADA Deployed</b>	<b>No. of ADA Stations</b>	<b>Total Capacity</b>	<b>Fuel Type*</b>	<b>Estimated Order Date</b>	<b>Estimated Delivery Date*</b>
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
<b>Totals:</b>	<b>0</b>	<b>Grand Total:</b>	<b>0</b>						

**\*Vehicle Category Descriptions:** <http://www.oregon.gov/ODOT/PT/resources/guidance-library/vehicle-descriptions-usefullife-standards.pdf>

**\*Fuel Type Options:** (G) Gas, (D) Diesel, (B) Biodiesel, (HG) Hybrid-gas, (HD) Hybrid-diesel, (CNG) Compressed Natural Gas, (OF) Other alternative Fuel.

**\*Estimated Delivery Date:** Minimum 160 days if ADA accessible.

**2017-2019 Section 5310(ODOT) Grant Application  
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**C. ORGANIZATIONAL CERTIFICATION**

By submitting this document via email to Cherriots, I certify that the submitted materials and data included are complete, true and correct. Also, I certify that my organization is:

- Eligible to enter into agreements with Cherriots;
- Has the legal, managerial and operational capacity to do the work to be paid for by the Section 5310 Program;
- Not debarred or suspended from federal grants;
- In compliance with federal, state and local laws and regulations including, and not limited to, those pertaining to passenger transportation, civil rights, labor, insurance, safety and health, as applicable;
- Complies with the laws or rules of the Section 5310 Program;
- Properly uses and accounts for the Section 5310 Program's goals; and
- Will operate the project or service in a safe, prudent and timely manner.

Jason T. [Signature]                      Community Development Director                      1-27-2017  
Signature of Authorized Organization Officer                      Title                      Date



**2017-2019 Section 5310(ODOT) Grant Application  
for Projects Located Within Marion and Polk Counties**

**Private Nonprofit Agency – Corporation Status Inquiry and Certification**

If your agency or organization is claiming eligibility as a Section 5310 or STF Program applicant based on its status as a private nonprofit organization, you must obtain verification of its incorporation number and current legal standing from the Oregon Secretary of State Information Retrieval/ Certification & Records Unit (IRC Unit). The "Status Inquiry" document must be attached as an appendix to the application. To assist your agency or organization in obtaining this information, use one of these two methods:

To obtain Corporate Records Information over the Internet, go to:  
<http://sos.oregon.gov/business/Pages/find.aspx> Enter the name of your agency or organization. If its status is active, print the page and submit it as proof.

**Private Non-profits**

Legal Name of Non-profit Applicant:

State of Oregon Articles of Incorporation Number:

Date of Incorporation:

**Certifying Representative**

Name (print):	
Title (print):	
Signature:	Date:

**2017-2019 Section 5310(ODOT) Grant Application  
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**RACIAL AND ETHNIC IMPACT STATEMENT**

**This form is used for informational purposes only and must be included with the grant application.**

Chapter 600 of the 2013 Oregon Laws require applicants to include with each grant application a racial and ethnic impact statement. The statement provides information as to the disproportionate or unique impact the proposed policies or programs may have on minority persons in the State of Oregon if the grant is awarded to a corporation or other legal entity other than natural persons.

1. The proposed grant project policies or programs could have a disproportionate or unique positive impact on the following minority persons:

Indicate all that apply:

- Women
- Persons with Disabilities
- African-Americans
- Hispanics
- Asians or Pacific Islanders
- American Indians
- Alaskan Natives

2. The proposed grant project policies or programs could have a disproportionate or unique negative impact on the following minority persons:

Indicate all that apply:

- Women
- Persons with Disabilities
- African-Americans
- Hispanics
- Asians or Pacific Islanders
- American Indians
- Alaskan Natives

3.  The proposed grant project policies or programs will have no disproportionate or unique impact on minority persons.

If you checked numbers 1 or 2 above, on a separate sheet of paper, provide the rationale for the existence of policies or programs having a disproportionate or unique impact on minority persons in this state. Further provide evidence of consultation with representative(s) of the affected minority persons.

I HEREBY CERTIFY on this 27 day of January, 2017, the information contained on this form and any attachment is complete and accurate to the best of my knowledge.

Signature: Jason Go Hgetra  
Printed Name: Jason Go Hgetra Title: Community Development Director

1 "Minority persons" are defined in SB 463 (2013 Regular Session) as women, persons with disabilities (as defined in ORS 174.107), African-Americans, Hispanics, Asians or Pacific islanders, American Indians, and Alaskan Natives.



# SILVER TROLLEY

## Vehicle Maintenance Plan

The goals of the vehicle maintenance plan of the Silver Trolley is to support safe, reliable, and high quality service to our citizens and visitors to our community while making maximum use of financial resources. An effective maintenance plan ensures safe transit vehicles on the road and maximizes transit vehicle life.

The Silver Trolley utilizes a certified mechanic as the primary provider for vehicle maintenance needs. Responsibilities include scheduled preventative maintenance checklists and oil change inspections. Les Swab Tire Center or another responsible vendor will be responsible for scheduled break inspections and tire rotations. Approved vendors will provide additional work and major engine repairs, including warranty service.

### Vehicle List:

1FD4E45S29DA92842: 2009 Ford/Startrans Senator Cutaway Bus

2D4NRN4DE7AR164555: 2010 Dodge/Braun Entervan

1FTNE2EL3DDA15046: 2013 Ford E250 Conversion Van

### Daily Vehicle Inspections

Specific procedures are outlined and monitored to ensure that all vehicles are inspected prior to the transit vehicle going into service each day and a post-trip inspection at the end of the service day. Drivers will perform a comprehensive checklist of essential maintenance elements and record the result on the pre-trip inspection form. The inspection form includes inspection of wheelchair lifts. If a defect identified will cause further damage or presents a safety hazard, the vehicle will not be put into operation. Any defects identified will be reviewed by a certified mechanic and discussed with the drivers, dispatch, and Community Development Director.

### Preventative Maintenance Schedule

The following are minimum preventative maintenance inspections:

- Change engine oil, air filter, check coolant level, windshield washer fluid, brake fluid level (3,000-5,000)
- Replace/Repair Tires (As needed)
- Check Tire Pressure/check for nails or damage
- Visually check suspension for damage or wear
- Replace brakes if needed
- Check wheelchair lift and replace worn components, clean and adjust as needed
- Check wheelchair securements and other accessible features
- All vehicles shall be subject to an annual safety inspection (form attached).

- All vehicles shall be maintained per manufacture's guidelines.

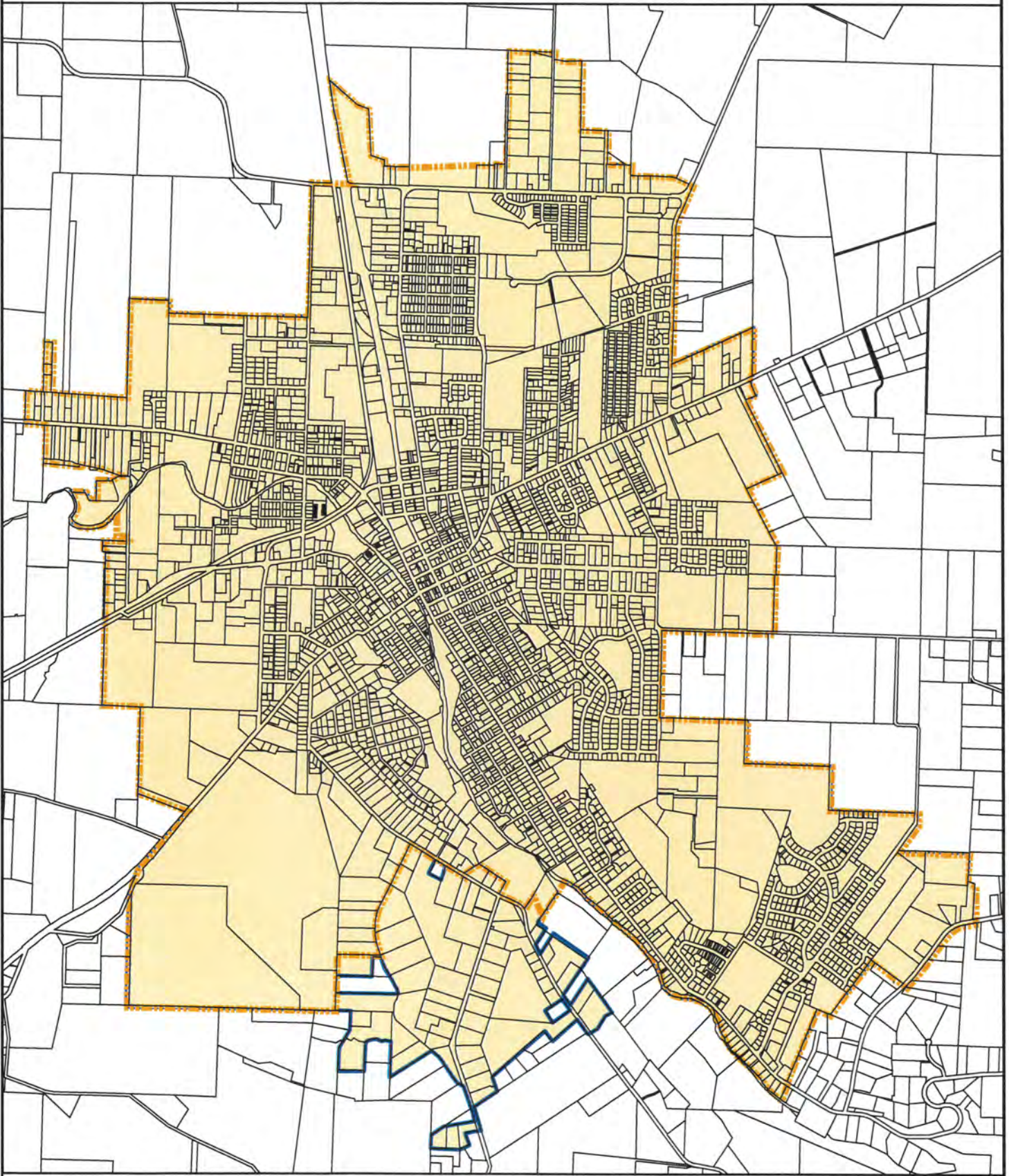
#### Vehicle Breakdown

In the event of transit vehicle breakdown, a spare unit will be used for the remainder of the trips until the vehicle can be repaired. The transit vehicle involved with the breakdown will be taken out of service, scheduled for repair and a record maintained to prevent future incidents. Only after the repairs have been made to the transit vehicle will it be returned to service. Prior to any repairs, staff will check to see if repairs are covered by the vehicle warranty and pursue warranty claims diligently.

#### Records

The City will maintain vehicle maintenance records for each of the vehicles for at least 3 years.

# City of Silverton - Silver Trolley Service Area



## Legend



Silverton Urban Growth Boundary - Area of Service



[163]



Disclaimer:  
This map was published by the City of Silverton Community Development Department as a general planning tool. Due to the differing quality of source data, the Department cannot accept responsibility for errors or omissions, and therefore, there are no warranties which accompany this material.

**2017-2019 Section 5310(ODOT)  
Grant Application  
for Projects Located Within  
Marion and Polk Counties**



**2017-2019 Section 5310(ODOT) Grant Application  
for Projects Located Within Marion and Polk Counties**

**INTRODUCTION**

- Read the *2017-2019 Section 5310(ODOT) Grant Application Instructions* prior to completing this application.
- Each project submitted for funding consideration must have its own application.
- Selection criteria are detailed in the *Application Instructions*.
- This form must be filled out using Microsoft Word and submitted as a Word or Adobe .pdf document. Paper applications will NOT be accepted.
- Signature pages should be scanned and attached as separate pages to each application.

**Submittal Checklist**

***Make sure***

- ✓ Application is complete, signed, and dated

***Submit***

- ✓ Proof of agency status (template included in application packet)
- ✓ Ethnic and Racial Impact Statement
- ✓ Maintenance Plan (if submitting an application for preventive maintenance)

**A. ORGANIZATION INFORMATION**

**Name of Organization: City of Woodburn**

**Contact Person: Kathleen McClaskey**

**Address: 270 Montgomery St. Woodburn, Oregon 97071**

**Telephone: (503) 982-5245**

**Email: Kathleen.mcclaskey@ci.woodburn.or.us**

**2017-2019 Section 5310(ODOT) Grant Application  
for Projects Located Within Marion and Polk Counties**

**Type of Organization (check one)**

Government Agency	<input checked="" type="checkbox"/>
Private Not-for-Profit	<input type="checkbox"/>
Other	<input type="checkbox"/>

**Area of service (check one)**

Inside Marion and Polk Counties	<input checked="" type="checkbox"/>
Outside Marion and Polk Counties	<input type="checkbox"/>
Both inside and outside Marion and Polk Counties	<input type="checkbox"/>

**Organization Days and Hours of Operation**

Day	Hours
Sunday	
Monday	7:00 AM – 7:00 PM
Tuesday	7:00 AM – 7:00 PM
Wednesday	7:00 AM – 7:00 PM
Thursday	7:00 AM – 7:00 PM
Friday	7:00 AM – 7:00 PM
Saturday	
Please list any planned periods of service closure greater than 3 days (i.e., closed the week between Christmas Day and New Year's Day)	

**Total transportation program costs by year**

FY16 (historical data, if applicable)	FY17 (projected, if applicable)	FY18
	\$41,500	\$42,846

**B. PROJECT INFORMATION**

**Project Title** (will be used for reviewer reference and in public comment process. Example: *Mobility Management for XYZ volunteer driver program*)

Woodburn Mobility Management Program
--------------------------------------

**Project service area to be served** (indicate the geographic features that define your service area such as streets, rivers, or jurisdictional boundaries)

North boundary	Woodburn City Limits
West boundary	Woodburn City Limits
South boundary	Woodburn City Limits
East boundary	Woodburn City Limits
Other general geographic area (i.e., within the City of Woodburn)	Within the Woodburn City Limits



**2017-2019 Section 5310(ODOT) Grant Application  
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*Optional: please provide a map of your service area as a separate single page 8.5"x11" attachment.*

**Total Section 5310(ODOT) funds requested**

\$84,346

**Start date**

July 1, 2017

**Funding request type (check one)**

Continuation of existing service at same level of service	<input checked="" type="checkbox"/>
Expansion of existing service	<input type="checkbox"/>
New service	<input type="checkbox"/>
Capital request	<input type="checkbox"/>
Other	<input type="checkbox"/>

**Project Service Types (check all that apply) *What type of service will be supported with the 5310(ODOT) grant?***

A. Open to the general public at all times	<input checked="" type="checkbox"/>
B. Open only to seniors and individuals with disabilities	<input checked="" type="checkbox"/>
C. Demand response	<input checked="" type="checkbox"/>
D. Open to the general public on a space-available basis	<input type="checkbox"/>
E. Limited to defined clientele (i.e., residential home)	<input type="checkbox"/>
F. Deviated route	<input type="checkbox"/>
G. Other (define):	<input type="checkbox"/>

**Project Types (check all that apply) *Select the project types that you wish to include in your application.***

A. Purchased service	<input type="checkbox"/>
B. Mobility Management	<input checked="" type="checkbox"/>
C. Replacement Vehicle(s)	<input type="checkbox"/>
D. Service Expansion and Right-sizing Vehicles	<input type="checkbox"/>
E. Capitalized Vehicle Preventive Maintenance	<input type="checkbox"/>
F. Equipment	<input type="checkbox"/>
G. Signs and Other Amenities	<input type="checkbox"/>
H. Passenger Shelters	<input type="checkbox"/>
I. Facilities (Bus Barns and Other Buildings)	<input type="checkbox"/>

**Scalable Section 5310(ODOT) Grant Request**

*You are strongly encouraged to request the full amount of funding that is needed for each project, including funding for new projects; however, funding is limited. Describe the scalability of your*

## 2017-2019 Section 5310(ODOT) Grant Application for Projects Located Within Marion and Polk Counties

5310(ODOT) funding request, how you scaled down your request and what aspects of the program would not be funded under this funding scenario below. Then enter your scaled down request amounts.

*Scalability Description: by reducing our mobility management funding by 5%, WTS would have the time available to assist 5-10 fewer clients with in-person and telephone trip planning, service provider coordination, and coordination with health care providers for our mobility challenged clients.*

	FY17	FY18	FY19
Scaled request:	\$	\$39,425	\$40,704

Identify the project's additional sources of funding in the table below

Estimated Additional Project Resources	
Source of Funds	Dollar Amount
2017-2019 Section 5310(ODOT) Grant Request ( <i>Important!</i> )	\$84,346
Local Resources	\$9,654
Federal Resources	\$
Other (provide description):	\$
<b>Project Grand Total</b>	<b>\$94,000</b>

### Coordinated Plan

Is project derived from the *Cherriots Coordinated Public Transit – Human Services Transportation Plan* dated August, 2016?  Yes  No If yes, what page(s)? p.67

If no, explain why the project is not part of the Coordinated Plan.

*For example: Is the project part of another plan (please name)? Is the plan still being finalized?*

### 1. Project Description

a.) Describe services or capital investment to be provided by Section 5310(ODOT) funding. Include a description of the following:

- Who you will serve?

## 2017-2019 Section 5310(ODOT) Grant Application for Projects Located Within Marion and Polk Counties

- What geographic area you will serve?
- What level of service will be provided to customers?
- Operational activities; how will customers request and receive rides, including scheduling and dispatching?
- Describe if volunteers will be utilized to provide service and how this will occur (will the volunteer program be supported with 5310(ODOT) or other funds? Will you provide mileage reimbursement to volunteers using their own vehicles?).
- How will the service be marketed?

Woodburn Transit takes an active role in providing customized transportation services. With features such as computerized dispatching and real time GPS vehicle tracking, the City's new AVL Tablet system enables us to provide efficient and highly customized trip coordination. We have also trained an employee to provide travel training to Woodburn Transit clients.

Woodburn Transit also provide individualized telephone and in-person trip planning assistance, which involves coordinating with services provided by other regional providers, such as CARTS, CAT and SMART. We regularly coordinate the transportation needs of clients from area social service agencies, such as AFS, Salud Clinic, Senior & Disability Services, etc. Transportation coordination for mobility challenged clients frequently involves trips to the home to better determine their accessibility needs and our strategies for providing services.

Woodburn Transit partners with the Woodburn Senior Volunteer Program to provide individualized trips to out of town medical appointments anywhere between Salem and Portland. Volunteers are reimbursed for mileage when using their own vehicles to provide this medical transportation. Our recently purchase MV-1 wheelchair vehicle provides an enhanced mobility experience for disabled residents needing medically related transportation outside of Woodburn.

We market using Google Transit, webpage, email newsletters, public meeting, flyers, and signs. Schedules and brochures are available from the bus driver, City Hall, Public Library, Medical facilities, shopping mall, and grocery stores and can be mailed to clients who call and request information. The City adopted an LEP program, which provides strategies for communicating with LEP populations about the City's transit services. As Spanish is the first language for thousands of Woodburn residents, a priority is placed on communicating in both English and Spanish. Bus Schedules are printed in English and Spanish, our office clerk is fluent in Spanish, and all signs are in English and Spanish. When phone inquiries are made by non-English speakers, the transit system is fully described to the client in Spanish and assistance with trip planning is offered. The transit website can also be translated into more than 50 different languages with the click of a button

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**b.) Will your project activities preserve existing service and/or provide new service?**

*Describe how the project preserves existing service or provides new or expanded service, limit 200 words*

This funding will allow WTS to preserve existing services.

**c.) Will you coordinate between providers to avoid duplication? Describe what level of coordination between partners is done and how duplication is avoided, limit 200 words**

WTS coordinates with other service providers and does not duplicate services. Staff help customers plan their trips on WTS to connect with other transit entities that make stops in Woodburn (CAT, CARTS, Cascades Point). WTS employees explain how our system works and helps local residents plan their trip on the fixed route bus, the Dial-A-Ride and Out of town Volunteer Medical services.

**d.) Is your project cost- effective?**

*Describe average cost per ride, cost per mile and cost per hour, limit 200 words*

When accounting for the fixed route, demand response, and out of town medical programs, the cost per ride is \$14.64, cost per mile is \$4.41, and cost per hour is \$61.05. These costs were calculated to include the entire program's expenses, including administration and operations.

**2017-2019 Section 5310(ODOT) Grant Application  
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**e.) Project Quality**

*Describe the **need** for this project. How was this need determined or assessed? Max 2,500 characters/approx. 400 words*

The City of Woodburn is committed to adequately serving the needs of its residents, a large proportion of whom are transportation challenged. Woodburn has an exceptionally large population of minorities, seniors, and people living below the poverty line. Woodburn Transit effectively serves the needs of low income and minority populations who need access to shopping, medical, and employment service locations. Major populated areas of the city are within walking distance to a bus stop. However, many of our clients need a much more hands on, customized transportation planning and delivery service. 5310 funding provides resources that are necessary to provide this level of service.

The need for this service was determined through the process of developing the 2010 Transit Plan Update, which has guided service improvements over the past six years. The public provided significant input into the development of the Plan, and onboard surveys are occasionally conducted and ridership input is considered when making changes to services. In the past fiscal year, 105 new clients have applied for eligibility to use the WTS programs after staff have explained how the programs work and the cost and availability of the programs.

**f.) Expected Outcomes**

*Describe the expected outcomes of this project on seniors and people with disabilities. Why is this project the best method to address the previously described need? Max 2,500 characters/approx. 400 words*

This project will enhance local mobility for Woodburn residents who are transportation challenged. WTS strives to provide a clean, safe, reliable, efficient, sustainable and affordable public transportation service for people traveling within Woodburn with a focus on those who do not have other transportation options; and to strive to provide residents, visitors, and workers traveling to or from Woodburn with efficient and convenient regional connections. Woodburn offers Dial-A-Ride door to door service to enhance local mobility for seniors and persons with disabilities. These services enhance the quality of life for Woodburn residents who depend on the local transit system to access needed services.

**2. Project impact on four goals of transit**

**a.) Describe the project's impact on access.**

*Access includes the ability of seniors and people with disabilities to travel to employment opportunities, community services, education, healthcare, etc., and to safely arrive at and depart their transit stop.*

## 2017-2019 Section 5310(ODOT) Grant Application for Projects Located Within Marion and Polk Counties

Woodburn Transit takes an active role in providing customized transportation services. With features such as computerized dispatching and real time GPS vehicle tracking, the City's new AVL Tablet system enables us to provide efficient and highly customized trip coordination. We are also going to train an employee to provide travel training to Woodburn Transit clients.

As needed, WTS employees visit the homes of older adults and people with disabilities to help plan trips and determine accessibility needs and the best mode of transportation for them. If clients are unsure of how to use the fixed route or Paratransit (Dial-A-Ride), staff will offer to ride with them on a trip to help learn to maneuver the transit system. Woodburn Transit also provides individualized telephone and in-person trip planning assistance, which involves coordinating with services provided by other regional providers, such as CARTS, CAT and SMART. We regularly coordinate the transportation needs of clients from area social service agencies, such as AFS, Salud Clinic, Senior & Disability Services, etc.

**b.) Describe the project's impact on availability.**

*Availability includes spatial availability (service close to me), time availability (service when I need it), and the size of the service area.*

Woodburn Transit is available Monday thru Friday 7am- 7pm. Woodburn Transit operates within the City limits of Woodburn. 5310 funding will help preserve the availability of service that is provided to Woodburn residents.

**c.) Describe the project's impact on connectivity.**

*Connectivity includes the integration of services (routes, schedules, fare structures, information systems, modal transfer facilities).*

Woodburn's Fixed Route service was developed to enhance its connectivity with regional transit providers, such as CAT, CARTS, and the Cascades Point. WTS regularly engages in coordination discussions with these providers to enhance the ability of riders to efficiently connect with others services. A group of providers recently began meeting to discuss the need for and ability to expand commuter services between Salem, Woodburn, Wilsonville, and the greater Portland area. Woodburn's fixed route fare is \$1.25. The Dial-A-Ride fare is \$2.50 per trip.

**d.) Describe this project's impact on economic development.**

*Economic development includes public transportation's contribution to providing connections for workers to employers, reducing congestion, influencing land use choice and land values, and providing employment opportunities.*

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WTS provides transportation services in a manner which reduces local traffic congestion and pollution. The service enhances economic development by providing users with access to locations facilitating commerce. Employers are more likely to develop in communities with a local/ regional transit service. Additionally, ODOT and the City recently completed the Woodburn Memorial Transit Facility, which is conveniently located at the I-5 Interchange. Plans are being made to provide regional commuter service, which will utilize this facility as a park and ride location – further enhancing economic opportunities.

**3. Project Budget**

Enter all costs involved in the **total** cost of the project.

Type	Amount
Labor (payroll)	\$94,000
Contracted services	\$
Materials and supplies	\$
Operations	\$
Preventive maintenance	\$
Capital equipment	\$
Technology	\$
Other (describe)	\$
Other (describe)	\$
Other (describe)	\$
Other (describe)	\$
<b>Project Total (right click and select "Update Field" to correct total)</b>	\$94,000
Amount requested in this grant	\$84,346

**2017-2019 Section 5310(ODOT) Grant Application  
for Projects Located Within Marion and Polk Counties**

**4. Provide the timeline of the project in the following table**

	<b>Step Description</b>	<b>Completion Date</b>
<b>1</b>	<b>Existing Service Begins</b>	<b>7/1/2017</b>
<b>2</b>	<b>Completion of Service</b>	<b>6/30/2019</b>
<b>3</b>		
<b>4</b>		
<b>5</b>		
<b>6</b>		

**5. Is your application for a replacement vehicle?**

Yes (continue to #6)     No (go on to Section C)



**2017-2019 Section 5310(ODOT) Grant Application  
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**6. Enter the following information about each vehicle to be replaced if the total cost of the vehicle is being requested:**

<b>Vehicle Category*</b>	<b>Qty (#)</b>	<b>Cost Each (\$)</b>	<b>Total (\$)</b>	<b>No. Seats w/ADA Deployed</b>	<b>No. of ADA Stations</b>	<b>Total Capacity</b>	<b>Fuel Type*</b>	<b>Estimated Order Date</b>	<b>Estimated Delivery Date*</b>
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
<b>Totals:</b>	<b>0</b>	<b>Grand Total:</b>	<b>0</b>						

**\*Vehicle Category Descriptions:** <http://www.oregon.gov/ODOT/PT/resources/guidance-library/vehicle-descriptions-usefullife-standards.pdf>

**\*Fuel Type Options:** (G) Gas, (D) Diesel, (B) Biodiesel, (HG) Hybrid-gas, (HD) Hybrid-diesel, (CNG) Compressed Natural Gas, (OF) Other alternative Fuel.

**\*Estimated Delivery Date:** Minimum 160 days if ADA accessible.

**2017-2019 Section 5310(ODOT) Grant Application  
for Projects Located Within Marion and Polk Counties**

**C. ORGANIZATIONAL CERTIFICATION**

By submitting this document via email to Cherriots, I certify that the submitted materials and data included are complete, true and correct. Also, I certify that my organization is:

- Eligible to enter into agreements with Cherriots;
- Has the legal, managerial and operational capacity to do the work to be paid for by the Section 5310 Program;
- Not debarred or suspended from federal grants;
- In compliance with federal, state and local laws and regulations including, and not limited to, those pertaining to passenger transportation, civil rights, labor, insurance, safety and health, as applicable;
- Complies with the laws or rules of the Section 5310 Program;
- Properly uses and accounts for the Section 5310 Program's goals; and
- Will operate the project or service in a safe, prudent and timely manner.



Signature of Authorized Organization Officer

*Assistant City Administrator* 1/27/17

Title

Date

**2017-2019 Section 5310(ODOT) Grant Application  
for Projects Located Within Marion and Polk Counties**

**Private Nonprofit Agency – Corporation Status Inquiry and Certification**

If your agency or organization is claiming eligibility as a Section 5310 or STF Program applicant based on its status as a private nonprofit organization, you must obtain verification of its incorporation number and current legal standing from the Oregon Secretary of State Information Retrieval/ Certification & Records Unit (IRC Unit). The "Status Inquiry" document must be attached as an appendix to the application. To assist your agency or organization in obtaining this information, use one of these two methods:

To obtain Corporate Records Information over the Internet, go to:  
<http://sos.oregon.gov/business/Pages/find.aspx> Enter the name of your agency or organization. If its status is active, print the page and submit it as proof.

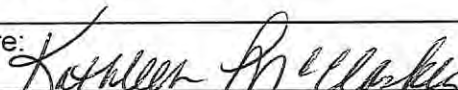
**Private Non-profits**

Legal Name of Non-profit Applicant:

State of Oregon Articles of Incorporation Number:

Date of Incorporation:

**Certifying Representative**

Name (print): Kathleen McClaskey	
Title (print): Transit Manager	
Signature: 	Date: 1/30/2017

# 2017-2019 Section 5310(ODOT) Grant Application for Projects Located Within Marion and Polk Counties

## RACIAL AND ETHNIC IMPACT STATEMENT

This form is used for informational purposes only and must be included with the grant application.

Chapter 600 of the 2013 Oregon Laws require applicants to include with each grant application a racial and ethnic impact statement. The statement provides information as to the disproportionate or unique impact the proposed policies or programs may have on minority persons in the State of Oregon if the grant is awarded to a corporation or other legal entity other than natural persons.

1. The proposed grant project policies or programs could have a disproportionate or unique positive impact on the following minority persons:

Indicate all that apply:

- Women
- Persons with Disabilities
- African-Americans
- Hispanics
- Asians or Pacific Islanders
- American Indians
- Alaskan Natives

2. The proposed grant project policies or programs could have a disproportionate or unique negative impact on the following minority persons:

Indicate all that apply:

- Women
- Persons with Disabilities
- African-Americans
- Hispanics
- Asians or Pacific Islanders
- American Indians
- Alaskan Natives

3. The proposed grant project policies or programs will have no disproportionate or unique impact on minority persons.

If you checked numbers 1 or 2 above, on a separate sheet of paper, provide the rationale for the existence of policies or programs having a disproportionate or unique impact on minority persons in this state. Further provide evidence of consultation with representative(s) of the affected minority persons.

I HEREBY CERTIFY on this 27 day of January, 2017, the information contained on this form and any attachment is complete and accurate to the best of my knowledge.

Signature



Printed Name: Kathleen McClaskey

Title: Transit Manager

1 "Minority persons" are defined in SB 463 (2013 Regular Session) as women, persons with disabilities (as defined

in ORS 174.107), African-Americans, Hispanics, Asians or Pacific islanders, American Indians, and Alaskan Natives.

**2017-2019 Section 5310(ODOT)  
Grant Application  
for Projects Located Within  
Marion and Polk Counties**



# 2017-2019 Section 5310(ODOT) Grant Application for Projects Located Within Marion and Polk Counties

## INTRODUCTION

- Read the *2017-2019 Section 5310(ODOT) Grant Application Instructions* prior to completing this application.
- Each project submitted for funding consideration must have its own application.
- Selection criteria are detailed in the *Application Instructions*.
- This form must be filled out using Microsoft Word and submitted as a Word or Adobe .pdf document. Paper applications will NOT be accepted.
- Signature pages should be scanned and attached as separate pages to each application.

## Submittal Checklist

### *Make sure*

- ✓ Application is complete, signed, and dated

### *Submit*

- ✓ Proof of agency status (template included in application packet)
- ✓ Ethnic and Racial Impact Statement
- ✓ Maintenance Plan (if submitting an application for preventive maintenance)

## A. ORGANIZATION INFORMATION

**Name of Organization: City of Woodburn**

**Contact Person: Kathleen McClaskey**

**Address: 270 Montgomery St. Woodburn, OR 97071**

**Telephone (503) 982-5245**

**Email: Kathleen.mcclaskey@ci.woodburn.or.us**

**2017-2019 Section 5310(ODOT) Grant Application  
for Projects Located Within Marion and Polk Counties**

**Type of Organization (check one)**

Government Agency	<input checked="" type="checkbox"/>
Private Not-for-Profit	<input type="checkbox"/>
Other	<input type="checkbox"/>

**Area of service (check one)**

Inside Marion and Polk Counties	<input checked="" type="checkbox"/>
Outside Marion and Polk Counties	<input type="checkbox"/>
Both inside and outside Marion and Polk Counties	<input type="checkbox"/>

**Organization Days and Hours of Operation**

Day	Hours
Sunday	
Monday	7:00 AM - 7:00 PM
Tuesday	7:00 AM - 7:00 PM
Wednesday	7:00 AM - 7:00 PM
Thursday	7:00 AM - 7:00 PM
Friday	7:00 AM - 7:00 PM
Saturday	
Please list any planned periods of service closure greater than 3 days (i.e., closed the week between Christmas Day and New Year's Day)	

**Total transportation program costs by year**

FY16 (historical data, if applicable)	FY17 (projected, if applicable)	FY18
\$	\$54,000	\$56,000

**B. PROJECT INFORMATION**

**Project Title** (will be used for reviewer reference and in public comment process. Example: *Mobility Management for XYZ volunteer driver program*)

Woodburn Preventive Maintenance Program
---

**Project service area to be served** (indicate the geographic features that define your service area such as streets, rivers, or jurisdictional boundaries)

North boundary	Woodburn City Limits
West boundary	Woodburn City Limits
South boundary	Woodburn City Limits
East boundary	Woodburn City Limits
Other general geographic area (i.e., within the City of Woodburn)	Within the Woodburn City Limits

**2017-2019 Section 5310(ODOT) Grant Application  
for Projects Located Within Marion and Polk Counties**

*Optional:* please provide a map of your service area as a separate single page 8.5"x11" attachment.

**Total Section 5310(ODOT) funds requested**

\$98,000

**Start date**

July 1, 2017

**Funding request type (check one)**

Continuation of existing service at same level of service	<input checked="" type="checkbox"/>
Expansion of existing service	<input type="checkbox"/>
New service	<input type="checkbox"/>
Capital request	<input type="checkbox"/>
Other	<input type="checkbox"/>

**Project Service Types (check all that apply)** *What type of service will be supported with the 5310(ODOT) grant?*

A. Open to the general public at all times	<input checked="" type="checkbox"/>
B. Open only to seniors and individuals with disabilities	<input checked="" type="checkbox"/>
C. Demand response	<input checked="" type="checkbox"/>
D. Open to the general public on a space-available basis	<input type="checkbox"/>
E. Limited to defined clientele (i.e., residential home)	<input type="checkbox"/>
F. Deviated route	<input type="checkbox"/>
G. Other (define): Preventive Maintenance	<input checked="" type="checkbox"/>

**Project Types (check all that apply)** *Select the project types that you wish to include in your application.*

A. Purchased service	<input type="checkbox"/>
B. Mobility Management	<input type="checkbox"/>
C. Replacement Vehicle(s)	<input type="checkbox"/>
D. Service Expansion and Right-sizing Vehicles	<input type="checkbox"/>
E. Capitalized Vehicle Preventive Maintenance	<input checked="" type="checkbox"/>
F. Equipment	<input type="checkbox"/>
G. Signs and Other Amenities	<input type="checkbox"/>
H. Passenger Shelters	<input type="checkbox"/>
I. Facilities (Bus Barns and Other Buildings)	<input type="checkbox"/>

**Scalable Section 5310(ODOT) Grant Request**

*You are strongly encouraged to request the full amount of funding that is needed for each project, including funding for new projects; however, funding is limited. Describe the scalability of your*



## 2017-2019 Section 5310(ODOT) Grant Application for Projects Located Within Marion and Polk Counties

5310(ODOT) funding request, how you scaled down your request and what aspects of the program would not be funded under this funding scenario below. Then enter your scaled down request amounts.

*Scalability Description: Our scaled request is reduced by 5% from our original request. Funding at this level would require deferring maintenance on many of our vehicles, including getting more life out of or tires.*

	FY17	FY18	FY19
Scaled request:		\$45,600	\$47,500

**Identify the project’s additional sources of funding in the table below**

Estimated Additional Project Resources	
Source of Funds	Dollar Amount
2017-2019 Section 5310(ODOT) Grant Request <i>(Important!)</i>	\$98,000
Local Resources	\$12,000
Federal Resources	\$
Other (provide description):	\$
<b>Project Grand Total</b>	<b>\$110,000</b>

### Coordinated Plan

Is project derived from the *Cherriots Coordinated Public Transit – Human Services Transportation Plan* dated August, 2016?  Yes  No If yes, what page(s)? p.67

If no, explain why the project is not part of the Coordinated Plan.

*For example: Is the project part of another plan (please name)? Is the plan still being finalized?*

### 1. Project Description

a.) Describe services or capital investment to be provided by Section 5310(ODOT) funding. Include a description of the following:

- Who you will serve?
- What geographic area you will serve?

**2017-2019 Section 5310(ODOT) Grant Application  
for Projects Located Within Marion and Polk Counties**

- What level of service will be provided to customers?
- Operational activities; how will customers request and receive rides, including scheduling and dispatching?
- Describe if volunteers will be utilized to provide service and how this will occur (will the volunteer program be supported with 5310(ODOT) or other funds? Will you provide mileage reimbursement to volunteers using their own vehicles?).
- How will the service be marketed?

This program funds the maintenance of Woodburn's fleet of 3 full sized buses, 3 cutaways, and 4 minivans. Effective preventive maintenance is provided to each vehicle to manage risk and improve safety, reduce operational cost, manage asset life cycle cost, and maximize equipment availability. Preventive maintenance services were contracted to a commercial provider in July 2013, which resulted in significantly more efficient and cost effective service. Woodburn's preventive maintenance contractor employs ASE Certified mechanics.

Woodburn Transit Service (WTS) provides transportation services to the general public, with the vast majority being seniors and persons with disabilities. Woodburn's Fixed Route and complementary paratransit programs operate within the city limits of Woodburn. The volunteer medical program transports clients to medical appointments outside of Woodburn to areas between Salem to Portland.

WTS provides a high level of service to the public through its Fixed Route, Dial-A- Ride, and Demand Response programs by ensuring that they have access to grocery, medical and other resources. WTS also provide individualized telephone and in-person trip planning assistance, which involves coordinating with services provided by other regional providers, such as CARTS, CAT and SMART. WTS regularly coordinates the transportation needs of clients from area social service agencies, such as AFS, Salud Clinic, Senior & Disability Services, etc. Transportation coordination for mobility challenged clients frequently involves trips to the home to better determine their accessibility needs and our strategies for providing services. As needed, WTS employees provide home visits to help determine the best transportation options for persons with disabilities. Employees also provide hands on assistance to help clients learn how to use the system.

**b.) Will your project activities preserve existing service and/or provide new service?**

*Describe how the project preserves existing service or provides new or expanded service, limit 200 words*

Woodburn will be preserving existing service with the award of this funding.

**2017-2019 Section 5310(ODOT) Grant Application  
for Projects Located Within Marion and Polk Counties**

**c.) Will you coordinate between providers to avoid duplication?** *Describe what level of coordination between partners is done and how duplication is avoided, limit 200 words*

WTS coordinates with other service providers and does not duplicate services. Staff help customers plan their trips on WTS to connect with other transit entities that make stops in Woodburn (CAT, CARTS, Cascades Point). WTS employees explain how our system works and helps local residents plan their trip on the fixed route bus, the Dial-A-Ride and Out of town Volunteer Medical services.

**d.) Is your project cost-effective?**

*Describe average cost per ride, cost per mile and cost per hour, limit 200 words*

This project is very cost effective. WTS began contracting out preventive maintenance services in July 2013. In FY 13/14, preventive maintenance costs decreased by 25% and another 44% in FY 14/15. Costs continue to trend lower than they were running prior to FY 13/14.

**e.) Project Quality**

*Describe the **need** for this project. How was this need determined or assessed? Max 2,500 characters/approx. 400 words*

This program funds the maintenance of Woodburn's fleet of 3 full sized buses, 3 cutaways, and 4 minivans. Effective preventive maintenance is provided to each vehicle to manage risk and improve safety, reduce operational cost, manage asset life cycle cost, and maximize equipment availability. Preventive maintenance services were contracted to a commercial provider in July 2013, which resulted in significantly more efficient and cost effective service. Woodburn's preventive maintenance contractor employs ASE Certified mechanics.

Woodburn's Preventive Maintenance program is an essential component of our ability to provide necessary transportation services to our residents. The City of Woodburn is committed to adequately serving the needs of its residents, a large proportion of whom are transportation challenged. Woodburn has an exceptionally large population of minorities, seniors, and people living below the poverty line. Woodburn Transit effectively serves the needs of low income and minority populations who need access to shopping, medical, and employment service locations. Major populated areas of the city are within walking distance to a bus stop.

**f.) Expected Outcomes**

*Describe the expected outcomes of this project on seniors and people with disabilities. Why is this project the best method to address the previously described need? Max 2,500 characters/approx. 400 words*

## 2017-2019 Section 5310(ODOT) Grant Application for Projects Located Within Marion and Polk Counties

Woodburn's Preventive Maintenance program is an essential component of our ability to provide necessary transportation services to our residents. Quality preventive maintenance is an essential component of our ability to provide clean, safe, reliable, efficient, sustainable and affordable public transportation service for people traveling within Woodburn with a focus on those who do not have other transportation options; and to strive to provide residents, visitors, and workers traveling to or from Woodburn with efficient and convenient regional connections.

Woodburn offers Dial-A-Ride door to door service to enhance local mobility for seniors and persons with disabilities. These services enhance the quality of life for Woodburn residents who depend on the local transit system to access needed services.

### 2. Project impact on four goals of transit

#### a.) Describe the project's impact on access.

*Access includes the ability of seniors and people with disabilities to travel to employment opportunities, community services, education, healthcare, etc., and to safely arrive at and depart their transit stop.*

Woodburn Transit takes an active role in providing customized transportation services. With features such as computerized dispatching and real time GPS vehicle tracking, the City's new AVL Tablet system enables us to provide efficient and highly customized trip coordination. We are also going to train an employee to provide travel training to Woodburn Transit clients.

As needed, WTS employees visit the homes of older adults and people with disabilities to help plan trips and determine accessibility needs and the best mode of transportation for them. If clients are unsure of how to use the fixed route or Paratransit (Dial-A-Ride), staff will offer to ride with them on a trip to help learn to maneuver the transit system. Woodburn Transit also provides individualized telephone and in-person trip planning assistance, which involves coordinating with services provided by other regional providers, such as CARTS, CAT and SMART. We regularly coordinate the transportation needs of clients from area social service agencies, such as AFS, Salud Clinic, Senior & Disability Services, etc.

#### b.) Describe the project's impact on availability.

*Availability includes spatial availability (service close to me), time availability (service when I need it), and the size of the service area.*

**2017-2019 Section 5310(ODOT) Grant Application  
for Projects Located Within Marion and Polk Counties**

Woodburn Transit is available Monday thru Friday 7am- 7pm. Woodburn Transit operates within the City limits of Woodburn. 5310 funding will preserve the availability of service that is provided to Woodburn residents.

**c.) Describe the project's impact on connectivity.**

*Connectivity includes the integration of services (routes, schedules, fare structures, information systems, modal transfer facilities.*

Woodburn's Fixed Route service was developed to enhance its connectivity with regional transit providers, such as CAT, CARTS, and the Cascades Point. WTS regularly engages in coordination discussions with these providers to enhance the ability of riders to efficiently connect with others services. A group of providers recently began meeting to discuss the need for and ability to expand commuter services between Salem, Woodburn, Wilsonville, and the greater Portland area. Woodburn's fixed route fare is \$1.25. The Dial-A-Ride fare is \$2.50 per trip.

**d.) Describe this project's impact on economic development.**

*Economic development includes public transportation's contribution to providing connections for workers to employers, reducing congestion, influencing land use choice and land values, and providing employment opportunities.*

WTS provides transportation services in a manner which reduces local traffic congestion and pollution. The service enhances economic development by providing users with access to locations facilitating commerce. Employers are more likely to develop in communities with a local/ regional transit service. Additionally, ODOT and the City recently completed the Woodburn Memorial Transit Facility, which is conveniently located at the I-5 Interchange. Plans are being made to provide regional commuter service, which will utilize this facility as a park and ride location – further enhancing economic opportunities. Woodburn's contract with a local vehicle maintenance contractor enhances the local economy and enhances job opportunities for local residents.

**2017-2019 Section 5310(ODOT) Grant Application  
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**3. Project Budget**

Enter all costs involved in the **total** cost of the project.

Type	Amount
Labor (payroll)	\$
Contracted services	\$110,000
Materials and supplies	\$
Operations	\$
Preventive maintenance	\$
Capital equipment	\$
Technology	\$
Other (describe)	\$
Other (describe)	\$
Other (describe)	\$
Other (describe)	\$
<b>Project Total (right click and select "Update Field" to correct total)</b>	\$110,000
Amount requested in this grant	\$98,000

**2017-2019 Section 5310(ODOT) Grant Application  
for Projects Located Within Marion and Polk Counties**

4. Provide the timeline of the project in the following table

	<b>Step Description</b>	<b>Completion Date</b>
<b>1</b>	<b>Project Begins</b>	<b>July 1, 2017</b>
<b>2</b>	<b>Project Concludes</b>	<b>June 30, 2019</b>
<b>3</b>		
<b>4</b>		
<b>5</b>		
<b>6</b>		

5. Is your application for a replacement vehicle?

- Yes (continue to #6)     No (go on to Section C)

**2017-2019 Section 5310(ODOT) Grant Application  
for Projects Located Within Marion and Polk Counties**

**6. Enter the following information about each vehicle to be replaced if the total cost of the vehicle is being requested:**

<b>Vehicle Category*</b>	<b>Qty (#)</b>	<b>Cost Each (\$)</b>	<b>Total (\$)</b>	<b>No. Seats w/ADA Deployed</b>	<b>No. of ADA Stations</b>	<b>Total Capacity</b>	<b>Fuel Type*</b>	<b>Estimated Order Date</b>	<b>Estimated Delivery Date*</b>
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
<b>Totals:</b>	<b>0</b>	<b>Grand Total:</b>	<b>0</b>						

**\*Vehicle Category Descriptions:** <http://www.oregon.gov/ODOT/PT/resources/guidance-library/vehicle-descriptions-usefullife-standards.pdf>

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- Complies with the laws or rules of the Section 5310 Program;
- Properly uses and accounts for the Section 5310 Program's goals; and
- Will operate the project or service in a safe, prudent and timely manner.



Signature of Authorized Organization Officer

*Assistant City Administrator* 1/27/17

Title

Date

**2017-2019 Section 5310(ODOT) Grant Application  
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**Private Nonprofit Agency – Corporation Status Inquiry and Certification**

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<http://sos.oregon.gov/business/Pages/find.aspx> Enter the name of your agency or organization. If its status is active, print the page and submit it as proof.

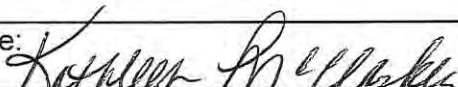
**Private Non-profits**

Legal Name of Non-profit Applicant:

State of Oregon Articles of Incorporation Number:

Date of Incorporation:

**Certifying Representative**

Name (print): Kathleen McClaskey	
Title (print): Transit Manager	
Signature: 	Date: 1/30/2017

# 2017-2019 Section 5310(ODOT) Grant Application for Projects Located Within Marion and Polk Counties

## RACIAL AND ETHNIC IMPACT STATEMENT

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1. The proposed grant project policies or programs could have a disproportionate or unique positive impact on the following minority persons:

Indicate all that apply:

- Women
- Persons with Disabilities
- African-Americans
- Hispanics
- Asians or Pacific Islanders
- American Indians
- Alaskan Natives

2. The proposed grant project policies or programs could have a disproportionate or unique negative impact on the following minority persons:

Indicate all that apply:

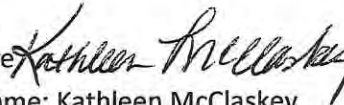
- Women
- Persons with Disabilities
- African-Americans
- Hispanics
- Asians or Pacific Islanders
- American Indians
- Alaskan Natives

3. The proposed grant project policies or programs will have no disproportionate or unique impact on minority persons.

If you checked numbers 1 or 2 above, on a separate sheet of paper, provide the rationale for the existence of policies or programs having a disproportionate or unique impact on minority persons in this state. Further provide evidence of consultation with representative(s) of the affected minority persons.

I HEREBY CERTIFY on this 30 day of January, 2017, the information contained on this form and any attachment is complete and accurate to the best of my knowledge.

Signature



Printed Name: Kathleen McClaskey

Title: Transit Manager

"Minority persons" are defined in SB 463 (2013 Regular Session)  
as women, persons with disabilities (as defined

in ORS 174.107), African-Americans, Hispanics, Asians or Pacific islanders, American Indians, and Alaskan Natives.

## Goals and objectives

It is the objective of the City of Woodburn's Transit System to comply with the rules set forth by the Federal Transit Administration (FTA), and Oregon Department of Transportation's Rail and Public Transit Division (RPTD), to qualify for the associated grant funding and provide the Woodburn community with safe and cost effective transportation.

The Woodburn Transit System will establish an inventory of its transit vehicle assets included in the program, and a schedule and process for periodically updating the inventory.

A narrative of maintenance responsibilities will be established together with management Supervision, drivers, mechanics and other maintenance staff to assure that all stake holders are dedicated to provide quality service for the community. A preventive maintenance plan with the following components will be established:

1. Preventive maintenance servicing schedule for each program vehicle in the fleet.
2. A process for managing and monitoring vehicle warranties and service agreements.
3. A vehicle daily servicing plan is combined with the pre & post-trip inspections.
4. Driver's daily pre-trip inspections and post-trip inspections reports.
5. Mechanic's mileage & time based service and inspections.
6. Procedure for follow-up repairs arising from pre-trip and post-trip inspections.
7. Documentation regarding any vehicle being pulled from service until required repairs are made.
8. An annual vehicle safety inspection by an ASA certified mechanic. (This inspection includes all safety components and all ADA-related equipment).
9. New driver vehicle orientation, including proper and safe use of the vehicle and installed equipment including safety and emergency procedures.
10. A consumables re-stocking procedure assigning responsibility and date intervals for restocking fuel, oil, parts, and supplies and items eligible as operating expenses, in ODOT PTD grant programs which fund operating expenses
11. A vehicle repair policy for unplanned mechanical breakdowns, whether repairs are performed in-house or are contracted out
12. Vehicle storage procedures that ensure safety and security for vehicles while not in use.
13. Woodburn's vehicle management information system (VMIS) documents vehicle inspections, maintenance and repair activities. The system tracks dates, services performed, parts used, costs incurred, and when the next service/inspection is due (miles and/or date).



## (1) INDIVIDUAL VEHICLE PREVENTIVE MAINTENANCE SCHEDULE AND RECORDS

A preventive maintenance schedule has been prepared for every grant-funded vehicle Woodburn has been awarded. The vehicle preventive maintenance schedules are based on manufacturer's recommendations for each specific vehicle.

**Vehicle Condition Definitions:** PTD has established vehicle condition definitions that comply with FTA guidelines, and are used by Woodburn Transit for assessing and documenting the status of the vehicles in the fleet. The condition definitions are as follows;

### VEHICLE CONDITION DEFINITIONS

#### New

Vehicle has fewer than 2,500 miles, delivered over road from factory, or fewer than 250 miles, delivered by truck/rail. In new condition. Should appear on no more than 2 quarterly reports.

#### Excellent

Vehicle has low mileage in relation to age and no visible or evident mechanical or cosmetic flaws.

#### Good

Vehicle has average mileage in relation to age and only minor mechanical or cosmetic flaws.

#### Fair

Vehicle has high mileage in relation to age and/or noticeable mechanical or cosmetic flaws. Repairs are beginning to exceed normal maintenance schedules.

#### Poor

Vehicle has high mileage in relation to age and major mechanical or cosmetic flaws. Non-maintenance repairs are happening frequently and are becoming more costly. Major repairs such as engine or transmission overhaul are needed to keep the vehicle in service.

#### Out of Service

Vehicle is unreliable or is completely inoperable. Vehicle has been pulled from service due to mechanical or body/chassis flaws which create unsafe operating conditions. Vehicle is not ADA compliant.

**Records Retention Requirement:** Individual vehicle records, including; procurement, maintenance and repair records will be retained for three years beyond disposal of the vehicle.

**Scheduled Service Intervals:** The preventive maintenance schedule includes service triggers for maintenance to be performed. These are based on miles elapsed that are expressed by the various vehicle manufacturers. Certain lubrication products used by Woodburn's fleet maintenance provider extend the manufactures suggested service Intervals but do not change the fact that they are based on multiples of elapsed mileage and lab analysis done on the spent lubricants at the time of the service interval. This minimizes the frequency of preventive maintenance servicing, and allows the maintenance staff time to perform other required service.



All service intervals meet or exceed manufacturers' recommendations. The scheduled service addresses every component included in the manufacturer's warranty requirements schedule, including all safety equipment and ADA-accessibility equipment, including wheelchair lifts. Some Service Intervals are superseded taking into consideration seasonal and environmental factors.

**Wheelchair Lift Maintenance:** Preventive maintenance for powered lifts are scheduled based on time-intervals rather than on lift cycles due to the relatively low use rates. Cycle counters are installed on all Woodburn vehicle lifts and are checked during routine PM schedule. During the PM inspection, the wheelchair lift is cycled to observe operational and safety features. Any worn parts will be noted and replaced at that time.

**Vehicle Maintenance Schedule Chart:** A tracking chart will be maintained in each of the vehicle files documenting both the maintenance service schedule and the next service due for each vehicle component. This chart will be maintained for as long as the vehicle is used to provide public transportation. The Vehicle Maintenance Schedule Chart includes:

1. Vehicle manufacturer, year, make, model, size, and type;
2. Vehicle chassis VIN number, license plate number, and a Woodburn asset and vehicle number;
3. A checklist of major vehicle components requiring scheduled maintenance or service—component list must include ADA equipment;
4. Annual safety inspections—either as a separate line item or identified in a line item with an interval that meets the requirement of annual inspection (the safety components inspected should be identified in the checklist);
5. Scheduled maintenance activities to be performed, identified by either date (time period), odometer reading (elapsed mileage), or number of lift cycles;
6. Dates the scheduled maintenance or service was actually completed, including any repairs made, depending on software used;
7. Vehicle odometer mileage at time of each maintenance or service;
8. Warranty maintenance service performed, whether noted as part of the regular scheduled maintenance, or performed separately;
9. Name, initials or unique employee identifier (e.g., ID Badge number) of person who performed the maintenance, if agency has in-house maintenance shop;
10. Initial of agency staff member responsible for vehicle maintenance (per Vehicle Maintenance Plan), if service is contracted to another facility;
11. For contracted work, vendor invoices and associated documents in the vehicle file confirming that work was done on date noted in chart.

**Vehicle Preventive Maintenance Records:** Vehicle maintenance records, including the Vehicle Maintenance Chart described above, is maintained for each vehicle, to show whether or not maintenance has in fact been performed according to vehicle manufacturers' established preventive maintenance schedule. The maintenance records will also show that recommended repairs have been made on a timely basis. Vehicle maintenance and repair documentation is an FTA requirement for all federally funded assets. All vehicle maintenance records will be made available when requested by PTD staff or its representatives. Vehicle maintenance records for each vehicle are kept in separate files, and include:

**Individual files for each program vehicle will include:**

1. A Vehicle Maintenance Schedule for each vehicle
2. Documentation of annual safety inspections, including ADA components, performed by a certified technician

- with manufacturer- training for the vehicle and for specialized, on-board ADA components;
3. Completed daily pre-trip and post-trip driver checklists documenting that all safety features are functioning.
  4. The driver's pre-trip checklist must include deploying any wheelchair lift equipment and interlock features. The post-trip checklist must include indications of service or repairs required, action taken to do the work, and whether or not the vehicle must be taken out of service until repair or service is done, based on agency maintenance policies and safe operation standards;
  5. Chart of periodic maintenance performed according to maintenance schedule (see below);
  6. Copies of all parts or services invoices, or internal repair orders, documenting that the maintenance and repairs were performed.

### **VEHICLE REPAIRS AS PART OF PREVENTIVE MAINTENANCE**

Vehicle repairs include planned major parts replacements (one instance per vehicle per biennium may be reimbursed in a Capital Preventive Maintenance Grant)

Repairs arising out of pre-trip, post-trip, or mileage/time-based inspections (including annual safety inspections) and wear and tear repairs or replacements (e.g., nicks and minor windshield chips, cracked light covers, individual seat tears, tires, planned brake jobs, lift repairs, bus washing and detailing, etc.) Although defined as maintenance repairs, warranty/recall servicing, warranty/recall parts replacement, and repairs resulting from accidents, are not eligible expenses in PTD capitalized preventive maintenance grants.

Any warranty work not covered that must be paid for by Woodburn should be reimbursed as an operating expense, not in the capitalized preventive maintenance grant.

Warranty work will be performed in a timely manner, and Woodburn will access the manufacturer's warranty via the vendor if assistance is needed to determine what is covered.

Accident repairs will be covered by insurance. Any deductibles or charges resulting from an accident that Woodburn must pay are also considered operating expenses that cannot be reimbursed from a capital preventive maintenance grant.

#### **A Vehicle Repair Work Order form to record the repair activities will include:**

1. The start and end date of repairs
2. The reason for the repair (for example, bus wouldn't start, check engine light came on, inspection finding, or accident)
3. What repairs were made
4. Labor hours
5. Parts used
6. Who did the work

A Work Order will be used whenever a contracted repair facility or the City's "Garage" performs repair services. Woodburn Transit will require work orders or invoices from the company performing the maintenance or repair that, at a minimum:

1. State the issue
2. Parts installed

### 3. Separate labor charges

Once the work is completed, the repairs will be documented on the Vehicle Maintenance Chart. The Work Order will be kept in the individual vehicle maintenance file, where it becomes part of the historical record for that vehicle. These documents are also provided either as required reimbursement documents, or as the basis for completing the vehicle Preventive Maintenance Reimbursement Request attachment form (the Excel spreadsheet for use in lieu of providing copies of vendor receipts).

## **VEHICLE CLEANING**

Transit vehicles are regularly cleaned inside and out. Woodburn Transit's preventive maintenance plan includes vehicle cleaning weekly or as needed. Washing includes periodic washing or steam-cleaning the vehicle engine and undercarriage, and application of a protective coating to the painted surfaces, if recommended, and as specified by the manufacturer. An interior and exterior cleaning schedule was developed, which specifies cleaning activities to be performed at specified intervals. The cleaning standards include the activities noted below.

### **Bus Clean-up – Daily**

- Squeegee window exteriors, dry off mirrors
- Clean spots off windows, interior
- Clean driver area (dash, consoles, seat, fare box, windshield)
- Sweep or mop floors
- Replace trash bag

### **Bus Clean-up – Weekly or as Needed**

- Same as daily, plus:
- Clean all interior windows
- Vacuum seats, wipe down stanchions & railings
- Clean seats with disinfectant (fabric or vinyl cleaner)

### **Bus Clean-up – Service Interval (4-6 weeks)**

- Same as daily and weekly plus:
- Clean all interior bulkhead and ceiling surfaces
- Scrub floors
- Apply dressing to dash, console and driver area (such as a product that cleans, shines and protects surfaces)
- Clean water spots off mirrors
- Apply exterior protectant (per manufacturers' specifications)

## **VEHICLE STORAGE AND SAFETY**

1. **A secured vehicle parking area.** Woodburn Transit vehicles are stored within a gated and locked fenced area at the Maintenance and Transit Facilities

2. **Security surveillance.** Woodburn Transit vehicles utilize a security camera monitoring system 24 Hrs per day.

3. **Safety procedures.** Woodburn Transit has a no exception brake setting and transmission-in-park requirement of drivers. The Parking area is set up with white lined spaces and bumper blocks. The Busses are backed in to the space





to maximize space and to be ready for forward driving and avoid operating vehicles in reverse. Backing up is used for storage to minimize backing into unknown circumstances.

4. **Key Control.** Keys are removed from all vehicles and vehicles are locked at shift-end. The keys are returned to the Transit Office where they are kept in a lock box.

5. **Suspicious Package Checks.** The FTA, in conjunction with the Office of Homeland Security, strongly encourage transit providers to adopt safety guidelines related to bomb threats and suspicious circumstances. Agencies should have a procedure for employees to appropriately and safely respond to the discovery of a suspicious package or device, which may include incidents at a vehicle storage facility.

## **PART II: VEHICLE FLEET MANAGEMENT - BEST PRACTICES**

Woodburn Transit has utilized the following sources to facilitate The Vehicle Fleet Management - Best Practices Program. FTA, Community Transportation Association of America (CTAA), Small Urban & Rural Transit Center (SURTC), and other state transit agencies. It utilizes CarteGraph Maintenance Management Program to track Vehicle Maintenance and calculate vehicle efficiency. CarteGraph is the heart of Woodburn Transit's - Vehicle Information Management Systems (VMIS); in combination with paper checklists, forms, written procedures, and supervisory oversight responsibilities. Woodburn is developing best management practices to provide a value based program. The 3 primary components of our VMIS: 1) vehicle data-gathering; 2) vehicle data tracking and analysis; and 3) management oversight and maintenance decision-making support. Effective use of VMIS information by Woodburn Transit management will allow for informed decision making regarding vehicles and maintenance functions, which will in turn improve overall efficiency. The table below provides an overview of the data elements, outcomes, and functions in each of these areas.

### **VEHICLE DATA GATHERING ELEMENTS VEHICLE DATA TRACKING AND ANALYSIS OUTCOMES MANAGEMENT OVERSIGHT AND MAINTENANCE DECISION SUPPORT**

- Vehicle PM schedule
- Daily/monthly vehicle mileage log
- Daily/monthly vehicle in-service hours log
- Vehicle maintenance file
- Vehicle maintenance chart
- Pre-trip inspection reports
- Post-trip inspection reports
- Mileage or time-based inspection reports
- Repair work orders
- Accident reports
- Parts inventory/use report
- Annual and monthly maintenance cost per vehicle
- Annual and monthly average maintenance cost per vehicle type/category
- "Fully loaded" maintenance labor cost per hour
- Maintenance cost per vehicle mile, by vehicle
- Average maintenance cost per vehicle in-service hour
- Effectiveness of PM program in reducing breakdowns
- Adjusting interval schedule for PM (increase or decrease)
- Adequacy and appropriate skills mix of vehicle maintenance staffing



- Trends in consumable usage for budget adjustment (parts, fuel, oil, tires)
- Effectiveness of vehicle repair program (time between incidents; re-repair rate)
- Loss control evaluation and prevention (pilferage)
- Average productivity of mechanics and maintenance
- Consumables purchase records (fuel/oil/fluids/tires/etc.)
- Agency vehicle maintenance budget
- Agency vehicle maintenance actual costs by month
- Maintenance payroll and labor cost allocation records
- Maintenance vendor invoices
- Staff training costs/invoices
- Vehicle and equipment purchase orders
- Shop equipment purchases and maintenance records
- Contract invoices and reports (if maintenance is contracted out) vehicle type/category
- Parts inventory trend analysis
- Parts usage by month/staff-person/ vehicle
- Fuel use per vehicle/mile
- Average repair costs per vehicle/per vehicle type/category
- Comparative maintenance costs and trends by vehicle year
- Average vehicle down-time for maintenance and repairs
- Maintenance shop productivity (vehicles maintained per month, vehicle repairs per month, etc.)
- Determine need for additional (or less) maintenance staff
- Risk management: accident rates by vehicle and/or driver
- Comparative maintenance data to support vehicle purchase decisions (best make/model; most appropriate vehicle categories; etc.)**
- Fuel efficiency of present fleet
- Useful life threshold to replace vehicles (high maintenance costs)
- Review of driver and maintenance staff training needs

\* Source: ODOT Public Transit Division, 2010

## **VEHICLE FLEET REVIEW**

Using VMIS data, as well as other ridership information, route information, passenger surveys, and driver and maintenance staff input, Woodburn will periodically review their existing vehicle fleet. Among the questions to consider are:

1. Is the fleet size adequate for the current agency mission? Does the agency need more vehicles, or possibly fewer vehicles?
2. Is the agency using the appropriate type/category of vehicle for its present fixed route and/or demand response activities? Is the present fleet sized properly for ridership levels, route lengths/traffic, and vehicle wear-and-tear?
3. Is vehicle downtime for service within acceptable limits, and not causing service disruptions? Should spare/back-up vehicle capacity be expanded? (see below)

## **SPARE VEHICLE / BACK-UP CAPACITY**



In order to maintain scheduled routes and services without disruption when regularly assigned vehicles are down for maintenance servicing or repair, agencies need to maintain an appropriate number of back-up/spare vehicles. One published rule-of-thumb suggests that 85% of an agency's total fleet should be available for active revenue service (passengers on board), with 15% assigned as back-up vehicles for maintenance service and accident downtime.

More specific guidelines have been published for assisting agencies to determine the appropriate ratio of back-up vehicles for their fleet. Agencies should note these are general guidelines, not hard-and-fast rules. Some other factors the agency should consider in determining appropriate back-up vehicle capacity include geography, type of terrain traveled, road conditions, harsh weather conditions, length of routes, and condition of the current fleet.

<b>SIZE OF AGENCY'S REGULAR SCHEDULED FLEET</b>	<b>MINIMUM NO. OF BACKUP VEHICLES REQUIRED</b>
1 – 7 vehicles	1
8 – 13 vehicles	2
14 – 20 vehicles	3
21 – 29 vehicles	4
30 – 39 vehicles	5

### **VEHICLE MAINTENANCE EMPLOYEE TRAINING**

Maintaining vehicles in good working condition requires well-trained and well-supervised maintenance staff. Maintenance training for vehicle mechanics and vehicle service technicians should include, at a minimum:

1. Shop and overall facility familiarization, including training on all equipment for which they have responsibility
2. Facility safety training including hazard identification, location of fire and life safety equipment, shop power emergency disconnect location, safety exits, and emergency incident procedures;
3. Vehicle maintenance program scope and objectives training;
4. Transit agency's policy training, including safety and maintenance policies;
5. Applicable vehicle maintenance standards and regulations training, and instruction on how they are enforced;
6. Training on forms and procedures used in the agency's Vehicle Management Information System, including all inspection checklists;
7. Instruction on the safe operation and maintenance of all bus on-board safety equipment, and ADA equipment;
8. Specialized certification training as may be required by state, federal, or municipal regulations, and/or as a condition of employment (example ASE Certification) Maintenance training attempts to cover all vehicles and equipment operated by the transit agency. Training manuals, maintenance manuals, and all updates/revisions will be provided. The locations will be in the Transit Office or at the Fleet Shop location, for each type of vehicle and equipment being used by Woodburn Transit and repair technicians.
9. All vehicle manufacturers or component companies that manufacture the engine, transmission, or heating and air conditioning that offer specialized maintenance training will be utilized by the repair technicians.
10. All drivers will be given a complete familiarization of the vehicle, including engine compartment, driver



controls and passenger safety devices. Drivers will be trained to recognize unusual noises and to communicate basic mechanical problems to the repair technician.

11. Ongoing training will be provided to repair technicians to ensure that their skills are kept up-to-date. All training will be documented, and the effectiveness of the training program evaluated periodically. Supervisory training for shop supervisors is equally important, and should include not only technical training and updates, but also, at minimum, training in basic and advanced supervision; employee communication and effective listening; and problem-resolution skills.

**IN-HOUSE VERSUS CONTRACTED VEHICLE MAINTENANCE**

PTD will accept both in-house and contracted preventive maintenance programs that meet state and federal requirements. The same eligibility for capital reimbursements in grant programs apply to in-house and contracted or vendor-performed maintenance. The grant recipient agency also has the same responsibility to monitor and manage its vehicle maintenance program, whether the maintenance is performed at the agency’s facilities, is out-sourced to a single contractor, or is performed by local vendors.

Vehicle maintenance is one of the most significant expenses for the Transit Division. Woodburn Transit Division conducted a thorough evaluation of vehicle maintenance alternatives in 2013 and determined that it would be more economical to outsource vehicle maintenance to a commercial provider. Factors that were evaluated, included:

1. Significantly expanding, or considering a significant expansion of transportation services or vehicle fleet.
2. Experiencing significant and/or sustained cost increases in your maintenance function which are out-pacing growth in the agency’s financial resources.
3. Experiencing significant and/or sustained quality-control problems with vehicle maintenance, resulting in regular route delays, vehicle breakdowns, and/or service cancellations;
4. Regularly having difficulty recruiting and retaining qualified mechanics, due to pay differentials or geographic location;
5. Agency financial resources and available maintenance budget;
6. Size and condition of the vehicle fleet;
7. Cost and availability of vehicle maintenance facilities and equipment;
8. Ability to hire, train, pay, and retain qualified mechanics and maintenance staff;
9. Ability to effectively supervise an in-house vehicle maintenance operation;
10. Proximity and ability of qualified vehicle maintenance facilities/vendors to service the fleet in a timely and cost-effective manner

An agency’s VMIS can provide valuable data to perform an analysis of maintenance costs and alternatives. General guidelines have also been published indicating the average number of vehicles that one full-time mechanic can keep maintained, by category of vehicle:

<b>VEHICLE DESCRIPTION</b>	<b>ODOT – PTD VEHICLE CATEGORY</b>	<b>NO. OF VEHICLES MAINTAINED BY ONE FULL-TIME MECHANIC</b>
Passenger Sedan	E5, E6, E7	20 - 30
Van or Modified Van	E1, E2, E3, E4	15-30



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Light-to-Medium-Duty Bus Or Chassis Cutaway	C, D	5 - 20
Larger Transit Buses	A, B	3 - 10

\* Source: Management Toolkit for Small Urban and Rural Transit Operators, TCRP Report No. 54, U.S. Transportation Research Board, Washington DC

If considering contracting for maintenance service, grant recipients must follow their agencies established procurement policies and procedures, which may include seeking competitive bids or proposals. A written contract should be carefully negotiated to clearly define a schedule of charges for specific maintenance activities and should be reviewed by ODOT PTD staff prior to awarding if PTD grants fund the activity. The contract and/or bid should include a preventive maintenance schedule to be followed; vehicle turnaround timelines; quality control standards; and a process to mutually resolve problems or issues.

## RESOURCES

### Federal Publications

*Code of Federal Regulations (CFR) 49*

- Part 37, Transportation Services for Individuals with Disabilities (ADA) [49CFR37](#)
- Part 38, ADA Accessibility Specifications for Transportation Vehicles [49CFR38](#)
- Part 393, Parts and Accessories Necessary for Safe Operation [49CFR393](#)
- Part 396, Inspection, Repair, and Maintenance [49CFR396](#)
- Part 571, Federal Motor Vehicle Safety Standards (FMVSS) [49CFR571](#)

*Other Useful National Organization Publications*

- Federal Transit Agency – Bus Safety and Security Program – Resource Library [FTABusSafety](#)
- Community Transportation Association of America (CTAA) – ADA Resources [CTAA-ADA](#)

### State Publications

- ODOT – PTD State Management Plan [SMP](#)
- OARS Sections 732-005-0000 through 732-030-0035 [OARS732](#)
- Oregon Administrative Rules regarding Procurement (OAR Division 55) [OARDiv55](#)
- ODOT Department of Motor Vehicles Vehicle Code [DMVCode](#)

## FORMS & DOCUMENTS

Can be found on the [PTD website](#) under *Reporting and Forms*:

The **STF Quarterly Report** is a new, simple form that is designed to report just the distribution and uses of Special Transportation Fund Formula and Special Transportation Operating funds. The STF Agencies will be responsible for completing and submitting this report to PTD.

## Report Schedule



**Preventive Maintenance Plan  
2017-2019**

The quarterly schedule for reporting was adopted by Public Transit Division because quarterly reporting is perceived to be less intrusive for grantees (four reports per year instead of twelve) and because vehicle usage and certain other grants are required by FTA to be monitored at least every 90 days. Reports are required to be submitted on a quarterly basis, unless the grant agreement establishes another schedule. Reports are due at the Public Transit Division 45 days after the end of each quarter:

November 15, for July-September;

February 15, for October-December;

May 15, for January-March; and

August 15, for April-June.

Reports are required throughout the life of the grant agreement and in some cases, a longer period. See the following general guidelines for reporting periods:

For operating projects, including purchased services, reports are required throughout the fiscal period of the grant agreement even if the funds are spent prior to the end of the grant period.

For preventive maintenance, mobility management and planning projects, reports are required throughout the project period until the funds are depleted and all deliverables (as defined by the grant agreement) are submitted.

For a capital item, reports are required throughout the project period until the item is purchased and further throughout the “useful life” of the item. Useful life is defined by the State Management Plan, and is established for each item at the time the item is entered into Public Transit Division’s asset register. Vehicles and facilities will be reported every quarter while in active use, even if past the useful life.

Vehicle #: \_\_\_\_\_ Equipment #: \_\_\_\_\_ Asset #: \_\_\_\_\_ VIN #: \_\_\_\_\_  
 License #: \_\_\_\_\_ Year: \_\_\_\_\_  
 Make: \_\_\_\_\_ Model: \_\_\_\_\_ Mileage: \_\_\_\_\_  
 PM: \_\_\_\_\_ Last PM: \_\_\_\_\_ Next PM Due On: \_\_\_\_\_ Mechanic: \_\_\_\_\_  
 Date: \_\_\_\_\_

**Instructions: Write Initial in Appropriate Boxes Below**

TASKS TO BE PERFORMED	Inspected Okay	Repaired & Adjusted	Greased & Lubed	Comments & Parts List
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**A. Engine**

1. Hoses and Clamps
2. Mounting Brackets
3. Engine Cooling Fan
4. Drive Belts
5. Drive Pulleys
6. Engine Exhaust Manifold Bolts



- 7. Engine Idle Speed
- 8. Front Engine Mounts and Support Brackets
- 9. Rear Engine Mounts
- 10. Start Cables
- 11. Starting Motor
- 12. Fuel Lines
- 13. Fuel Tank

**B. Lubrication**

- 1. Change Oil
- 2. Oil Filter
- 3. Change Oil Filter
- 4. Change Fuel Filter – Primary
- 5. Change Fuel Filter – Water Separator
- 6. Change Air Cleaner
- 7. Power Steering Fluid Level
- 8. Power Steering Reservoir Filter
- 9. Transmission Level
- 10. Change Transmission Fluid
- 11. Change Transmission Filters
- 12. Check for Fluid Leaks
- 13. Air Conditioning Compressor
- 14. Battery Terminals
- 15. Engine Crankcase Breather
- 16. Front Wheel Bearing
- 17. Propeller Shaft
- 18. Suspension
- 19. Rear Axle Differential x 2
- 20. Real Wheel Bearings
- 21. Steering Column U-Joints
- 22. Steering Drag Link
- 23. Steering Gear Box
- 24. Steering Kin Pins
- 25. Steering Tie Rod Ends
- 26. Door Mechanism and Drive Assembly

- 27. Steering Column Gear Box
- 28. Wheel Chair Lift

**C. Cooling Systems**

**TASKS TO BE PERFORMED**

Inspected  
Okay

Repaired  
&  
Adjusted

Greased &  
Lubed

Comments &  
Parts List

- 1. Air Recirculation Baffles and Seals



2. Coolant
3. Drain and Flush
4. Hoses and Pipes
5. Coolant Filter
6. Radiator
7. Clean Radiator Core
8. Surge Tank
9. Pressure

**D. Transmission**

TASKS TO BE PERFORMED

Inspected  
Okay

Repaired  
&  
Adjusted

Greased &  
Lubed

Comments &  
Parts List

1. Lines and Fittings
2. Shift Linkage
3. Transmission Fluid Cooler

**E. Exhaust System**

1. Exhaust
2. Hangers
3. Mounting Brackets
4. Muffler
5. Tailpipe

**F. Wheels and Tires**

1. Wheel Mounting Studs
2. Wheel Stud Nuts

**G. Brakes**

TASKS TO BE PERFORMED

Inspected  
Okay

Repaired &  
Adjusted

Greased &  
Lubed

Comments &  
Parts List

1. Brake Assemblies and Linings
2. Brake Adjustment

**H. Drive Shaft**

1. Driver Shaft
2. U-Joints

**I. Rear Axle and Suspension**

1. Axle Shaft Flange
2. Axle and Suspension Mounting
3. Rear Axle Flange Nuts
4. Rear Shock Absorbers
5. Stabilizer Bar Link Assembly
6. U-Bolt

**J. Front Axle and Suspension**

1. Axle Assembly





2. Front Shock Absorbers

3. Front Suspension

**K. Chassis Electrical**

1. Battery

2. Battery Cables

3. Battery Mounting

**L. Heating and Air Conditioning**

1. Heater Controls - Front

2. Defroster Switch

3. Heater and Air Conditioner Controls Rear

4. Air Conditioning System - General

5. Refrigerant Pressure Switches

6. Water Circulation Pump and Motor

7. Air Circulation System

8. Condenser

9. Condenser Fan Drive Motors

10. Evaporator Fins

11. Evaporator Blower Mower

12. Heater

13. Refrigerant Valves

14. Filter – Inside Air

15. Louver – Inside Air

16. Evaporator Coil

17. Heater Core

18. Heater Lines

19. Refrigerant System

20. Air Conditioning Compressor - Assembly

21. Air Conditioning Compressor Clutch Assembly Armature

**M. Coach Interior**

**TASKS TO BE PERFORMED**

Inspected Okay	Repaired & Adjusted	Greased & Lubed	Comments & Parts List
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1. Driver's Seat

2. Driver's Seat Belt

3. Driver's Window

4. Entrance and Exit Door Step Threads

5. Fire Extinguisher

6. First Aid Kit

7. Flare Kit



- 8. Floor Covering
- 9. Front Destination Sign
- 10. Glass
- 11. Interior
- 12. Interior Cleanliness
- 13. Luggage Rack
- 14. Message Display Sign
- 15. Mirrors
- 16. Passenger Seats
- 17. Rattles and Squeaks
- 18. Roof Escape Hatch
- 19. Side Windows
- 20. Steering Column
- 21. Sun Visor
- 22. Windshield Washer Reservoir

**N. Coach Exterior**

**TASKS TO BE PERFORMED**

<b>Inspected Okay</b>	<b>Repaired &amp; Adjusted</b>	<b>Greased &amp; Lubed</b>	<b>Comments &amp; Parts List</b>
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- 1. Body Cleanliness
- 2. Bumpers
- 3. Closure Doors
- 4. Paint
- 5. Reflectors
- 6. Rub Rails
- 7. Skirt Panels
- 8. Tires
- 9. Walk Around Inspection
- 10. Windshield Wipers
- 11. Wheels
- 12. Wheel Chair Lift
- 13. First Aid Kit Sticker
- 14. Fire Extinguisher Sticker
- 15. Vehicle Number

**O. Body**

**TASKS TO BE PERFORMED**

<b>Inspected Okay</b>	<b>Repaired &amp; Adjusted</b>	<b>Greased &amp; Lubed</b>	<b>Comments &amp; Parts List</b>
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- 1. Bumper Mounting Bolts and Brackets
- 2. Compartment Access Doors
- 3. Door Emergency Release



4. Door Engine and Base Plate
5. Door Opening and Closing Speed
6. Door Panel Alignment
7. Door Seals
8. Exit Door Lower Pins
9. Fenders and Mud Flaps
10. Grab Rails and Stanchions
11. Interior Trim

**P. Operating Controls**

1. Accelerator and Brake Interlock
2. Air Conditioning Control System
3. Back-Up Alarm Horn
4. Brakes
5. Clearance, Marker and I.D.
6. Curb Lights
7. Defroster and Front Heater Blowers
8. Directional Lights
9. Door Exterior – Door Switch
10. Door Master Switch
11. Door Dump Valve
12. Doors and Controls
13. Exit Door Brake Interlock
14. Exit Door Sensitive Edges
15. Front Heater
16. Hazard Warning Lights
17. Headlights
18. Horn
19. Interior Lights
20. Power Steering
21. Rear Heater
22. Rear Ventilation
23. Stepwell Lights
24. Steering
25. Telltale Dash Lamps

TASKS TO BE PERFORMED

Inspected Okay	Repaired & Adjusted	Greased & Lubed	Comments & Parts List
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Preventive Maintenance Plan

2017-2019

Vehicle #		PM Maintenance Schedule		15,000 Miles	30,000 Miles	45,000 Miles	60,000	75,000	90,000	105,000
0		(MANUFAC) Engine *		6 Months	1 Year	1.5 Years	2 Years	2.5	3 Years	4 Years
0		Daily	7,500 Miles	Replace / Inspect	Replace / Inspect	Replace / Inspect	Replace / Inspect	Replace / Inspect	Replace / Inspect	Replace / Inspect
Transit	0	Or at Fueling	3 Months	Replace	Replace	Replace	Replace	Replace	Replace	Replace
Vehicle Description	0	Check	Replace / Inspect	Cabin Air Filter	AirFilter Element	Cabin Air Filter	AirFilter Element	Cabin Air Filter	AirFilter Element	Cabin Air Filter
Model Year	0	Oil Level	Replace	Engine Oil Analysis	Cabin Air Filter	Engine Oil Analysis	Cabin Air Filter	Engine Oil Analysis	Cabin Air Filter	Coolant
Chassis	0	Coolant Levels	Replace Engine Oil w/ Synthetic	Change Oil	Engine Oil Analysis	Change Oil	Engine Oil Analysis	Change Oil	Engine Oil Analysis	Engine Oil Analysis
Chassis VIN#	0	Tires	Replace Oil Filter	Oil Filter	Change Oil	Oil Filter	Change Oil	A/T Fluid / Filter	Fuel Filter	Change Oil
Body	0	Vehicle Inspection	Replace Differential Fluid							Differential Oil
Body VIN#	0									
Engine	0									
Transmission	0									
Lift	0									
In Service Date	01/00/00		Rotate Tires	Rotate Tires	Rotate Tires	Rotate Tires	Rotate Tires	Rotate Tires	Rotate Tires	Rotate Tires
Vehicle ID Number	0		Lube - Steering & Suspension	Lube - Steering & Suspension	Lube - Steering & Suspension	Lube - Steering & Suspension	Lube - Steering & Suspension	Lube - Steering & Suspension	Lube - Steering & Suspension	Lube - Steering & Suspension
Fuel Type	0		Inspect	Inspect	Inspect	Inspect	Inspect	Inspect	Inspect	Inspect
GVW	0		Brakes & Traction Control	Brakes & Traction Control	Brakes & Traction Control	Brakes & Traction Control	Brakes & Traction Control	Brakes & Traction Control	Brakes & Traction Control	AirFilter Element
Capacity	0									
Model	0									
Licence Plate	0		Coolant	Coolant	Coolant	Coolant	Coolant	Coolant	Coolant	Coolant
Engine Oil Type			Cooling System	Cooling System	Cooling System	Cooling System	Cooling System	Cooling System	Cooling System	Cooling System
Oil Filter #			Lube - Doors	Lube - Doors	Lube - Doors	Lube - Doors	Lube - Doors	Lube - Doors	Lube - Doors	Lube - Doors
Fuel Filter #			A/T Fluid Analysis	Exhaust System	Exhaust System	Exhaust System	Exhaust System	Exhaust System	Exhaust System	Exhaust System
Transmission Filter #			Inspect - Restraint Systems	A/T Fluid Analysis	A/T Fluid Analysis	A/T Fluid Analysis	A/T Fluid Analysis	A/T Fluid Analysis	A/T Fluid Analysis	A/T Fluid Analysis
Transmission Fluid Type			Fuel Supply Line	Fuel Supply Line	Fuel Supply Line	Fuel Supply Line	Fuel Supply Line	Fuel Supply Line	Fuel Supply Line	Fuel Supply Line
Air Cleaner #			Inspect - Restraint Systems	Inspect - Restraint Systems	Inspect - Restraint Systems	Inspect - Restraint Systems	Inspect - Restraint Systems	Inspect - Restraint Systems	Inspect - Restraint Systems	Inspect - Restraint Systems
			Inspect - Suspension	Inspect - Suspension	Inspect - Suspension	Inspect - Suspension	Inspect - Suspension	Inspect - Suspension	Inspect - Suspension	Inspect - Suspension
			Inspect - Throttle Cable/Linkage	Inspect - Throttle Cable/Linkage	Inspect - Throttle Cable/Linkage	Inspect - Throttle Cable/Linkage	Inspect - Throttle Cable/Linkage	Inspect - Throttle Cable/Linkage	Inspect - Throttle Cable/Linkage	Inspect - Throttle Cable/Linkage
			Vehicle Inspection	Vehicle Inspection	Vehicle Inspection	Vehicle Inspection	Vehicle Inspection	Vehicle Inspection	Vehicle Inspection	Vehicle Inspection
			Inspect Washer Fluid	Inspect Washer Fluid	Inspect Washer Fluid	Inspect Washer Fluid	Inspect Washer Fluid	Inspect Washer Fluid	Inspect Washer Fluid	Inspect Washer Fluid
			Inspect Wiper Blades	Inspect Wiper Blades	Inspect Wiper Blades	Inspect Wiper Blades	Inspect Wiper Blades	Inspect Wiper Blades	Inspect Wiper Blades	Inspect Wiper Blades

Service Record

Date	Miles Interval	Actual Miles	Maintenance Performed	Performed By	Comments

**2017-2019 Special Transportation  
Fund (STF) Grant Application  
for Projects Located Within Marion and  
Polk Counties**



# 2017-2019 STF Grant Application for Projects Located Within Marion and Polk Counties

## INTRODUCTION

- Read page 4 of the *Special Transportation Fund Instructions* for project and agency eligibility. The instructions are available on the ODOT Rail and Public Transit website: (<http://www.oregon.gov/ODOT/PT/Pages/news.aspx>).
- Use the instructions as a reference while filling out the application form.
- Each project submitted for funding consideration must have its own application.
- Selection criteria are detailed in Section 5 of the *Application Instructions*.
- This form must be filled out using Microsoft Word and submitted as a Word or Adobe .pdf document. Paper applications will NOT be accepted.
- Signature pages should be scanned and attached as separate pages to each application.

## Submittal Checklist

### ***Make sure***

- ✓ Application is complete, signed, and dated

### ***Submit***

- ✓ Proof of agency status (template included in application packet)
- ✓ Ethnic and Racial Impact Statement
- ✓ Maintenance Plan (if submitting an application for preventive maintenance)

## A. ORGANIZATION INFORMATION

**Name of Organization: Partnerships in Community Living, Inc.**

**Contact Person: Shawn McCammon**

**Address: 480 Main St. E. Monmouth, OR 97361**

**Telephone: 503-838-2403**

**Email: [smccammon@pclpartnership.org](mailto:smccammon@pclpartnership.org)**

**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

**Type of Organization (check one)**

Government Agency	<input type="checkbox"/>
Private Not-for-Profit	<input checked="" type="checkbox"/>
Other	<input type="checkbox"/>

**Area of service (check one)**

Inside Marion and Polk Counties	<input checked="" type="checkbox"/>
Outside Marion and Polk Counties	<input type="checkbox"/>
Both inside and outside Marion and Polk Counties	<input type="checkbox"/>

**Organization Days and Hours of Operation**

<b>Day</b>	<b>Hours</b>
Sunday	Services are 24 hours
Monday	Services are 24 hours; office 8am-5pm
Tuesday	Services are 24 hours; office 8am-5pm
Wednesday	Services are 24 hours; office 8am-5pm
Thursday	Services are 24 hours; office 8am-5pm
Friday	Services are 24 hours; office 8am-5pm
Saturday	Services are 24 hours
Please list any planned periods of service closure greater than 3 days (i.e., closed the week between Christmas Day and New Year's Day)	Not applicable

**Total transportation program costs by year**

FY16 (historical data, if applicable)	FY17 (projected, if applicable)	FY18 (projected)	FY19 (projected)
\$787,676.49	\$845,000	\$800,000	\$800,000

**B. PROJECT INFORMATION**

**Project Title** (will be used for reviewer reference and in public comment process. Example: *Mobility Management for The Confederated Tribes of Grand Ronde*)

New Vehicle Purchase for Disability Supports and Services
---

**Project service area to be served** (indicate the geographic features that define your service area such as streets, rivers, or jurisdictional boundaries)

North boundary	Yamhill County
West boundary	Lane County
South boundary	Jackson County
East boundary	Lane County
Other general geographic area (i.e., within the City of Woodburn)	PCL provides services in portions of Yamhill, Polk, Marion, Linn, Benton, Douglas, Lane, Josephine and Jackson Counties in Oregon.

*Optional:* please provide a map of your service area as a separate single page 8.5"x11"

**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

attachment.

**Total STF funds requested**

\$54,216.00
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**Start date**

Upon receipt of granted funds
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**Funding request type (check one)**

Continuation of existing service at same level of service	<input type="checkbox"/>
Expansion of existing service	<input type="checkbox"/>
New service	<input type="checkbox"/>
Capital request	<input checked="" type="checkbox"/>
Other	<input type="checkbox"/>

**Total Grant fund needs by year**

	FY17	FY18	FY19
STF project	\$54,216.00	\$0.00	\$0.00

**Scalable STF Grant Request by Year**

*You are strongly encouraged to request the full amount of funding that is needed for each project, including funding for new projects; however, funding is limited. Describe the scalability of your STF funding request, how you scaled down your request and what aspects of the program would not be funded under this funding scenario below. Then enter your scaled down request amounts.*

<i>Scalability Description: The closely estimated grant request need is \$. However, from a scalability standpoint, PCL is able to succeed in purchasing the new vehicle if the scaled request of \$50,000 was still granted.</i>
---

	FY17	FY18	FY19	Total
Scaled request:	\$50,000	\$0.00	\$0.00	\$50,000.00



**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

**Identify the project’s additional sources of funding in the table below:**

<b>Estimated Additional Project Resources</b>	
<b>Source of Funds</b>	<b>Dollar Amount</b>
2017-2019 STF Program Request ( <i>Important!</i> )	\$54,216.00
Local Resources	\$0.00
Federal Resources	\$0.00
Other (provide description):	\$0.00
<b>Project Grand Total</b>	<b>\$54,216.00</b>

The award of this STF Grant will enable federal funds to be brought to the project.

**Coordinated Plan**

Is project derived from the *Cherriots Coordinated Public Transit – Human Services Transportation Plan* dated August, 2016?  Yes  No If yes, what page(s)?

If no, explain why the project is not part of the Coordinated Plan.

*For example: Is the project part of another plan (please name)? Is the plan still being finalized?*

The effort/project to replace one of the aging vehicles in PCL’s fleet is specific to the organization and its programs. It is not part of the Human Services Transportation Plan. The vehicle would be utilized in the same manner as most of PCL’s fleet by providing various services. However, the vehicle would also be utilized to include other agencies similar to PCL through invitations to events and trips planned by PCL that focus on community involvement and accomplishing PCL’s mission.

**1. Project Description**

**a.) Describe services or capital investment to be provided by STF funding.** Include a description of the following:

- Who you will serve?
- What geographic area you will serve?
- What level of service will be provided to customers?
- Operational activities; how will customers request and receive rides, including scheduling and dispatching?
- Describe if volunteers will be utilized to provide service and how this will occur (will the volunteer program be supported with STF or other funds? Will you provide mileage reimbursement to volunteers using their own vehicles?).
- How will the service be marketed?

## 2017-2019 STF Grant Application for Projects Located Within Marion and Polk Counties

- Partnerships in Community Living, Inc. (PCL) provides support services for people with developmental and intellectual disabilities. PCL utilizes its vehicles to provide safe and reliable transportation for the people supported for a myriad of appointments, necessities including recreational outings and trips.
- PCL currently serves seven counties (Polk, Marion, Josephine, Jackson, Linn, Benton and Lane) in Oregon. Activities are sometimes outside of this geographical region, however, all services and activities focus on people living within this area. However, the majority of services provided are located in Polk and Marion Counties.
- The primary service provided will be transportation for people supported by PCL to and from activities that range from everyday necessities such as medical appointments and grocery shopping to social outings and trips to community events. With certain events or outings, people with disabilities from other local organizations are invited to attend and will be utilizing the vehicle as well.
- Activities that allow for other agencies to have people attend are directly contacted and invited by PCL team members involved with each particular outing or event.
- Volunteers are welcome and gladly utilized for events. However, volunteers are not typically reimbursed for mileage costs even with the unlikely event that personal vehicles are being used. If volunteers are involved with any event they participate in a support role to help with the logistics of the event.
- PCL operates a program within the organization called Day Trippers that schedules outings to events, etc for people supported to attend. Other local agencies are then contacted and invited to attend. This will, of course, continue and to be expanded as we continue to grow.

**b.) Will your project activities preserve existing service and/or provide new service?**

*Describe how the project preserves existing service or provides new or expanded service, limit 200 words*

The project will enable PCL to continue to provide the safest and best day to day supports available and to meet the varying level of support needs. A new wheelchair van will expand the ability to include other members of the community. They will benefit from PCL's efforts to ensure all people with disabilities lead more productive and fulfilling lives.

**c.) Will you coordinate between providers to avoid duplication? Describe what level of coordination between partners is done and how duplication is avoided, limit 200 words**

## 2017-2019 STF Grant Application for Projects Located Within Marion and Polk Counties

The project to replace an aging PCL vehicle will maintain the level of activity coordinated between PCL and other local agencies that provide supports to people with intellectual and developmental disabilities. The vehicle will be used as an integral part of PCL's vehicle fleet to maintain the level of care and support that we are dedicated to providing. In addition, PCL will continue to coordinate with other local agencies to include them in its effort to help provide a better quality of life for all people with disabilities. Cherriots and Salem-Keizer Transit services are utilized whenever possible to create independence and community integration for the people receiving supports.

### **d.) Is your project cost- effective?**

*Describe average cost per ride, cost per mile and cost per hour, limit 200 words*

PCL absorbs the operating costs of the vehicles used for events or activities that include other agencies, community members and family members. Because the new vehicle would also be used in many day to day operations and services where PCL would, obviously, be responsible for any and all operating costs.

### **e.) Project Quality**

*Describe the **need** for this project. How was this need determined or assessed? Max 2,500 characters/approx. 400 words*

This project is needed to increase the reliability, safety and security of PCL's vehicle fleet that consists of over 100 vehicles. The constant operating and maintenance costs of each vehicle increases as it ages and is a financial obligation that can, and has, exceeded projected budgets for fleet costs. Each vehicle sees much more usage and exceeds their typical life expectancy much sooner than privately owned vehicles due to the number of people that utilize them on a daily basis. PCL makes a specific effort to maintain and repair every vehicle in order to reduce costs through monthly car care maintenance schedules and is facilitated by PCL's own Fleet Manager. However, these efforts can only prevent the loss of a vehicle to a certain extent before it must be replaced. This project to acquire a new vehicle will help to reduce costs not only for the immediate future, but also over time as it will require less repair and maintenance for some time as compared to many of the older vehicles currently in use. Ultimately, this will allow PCL to provide safer and more reliable transportation for all of the activities, both internal and community based, that require use of vehicles in PCL's fleet.

### **f.) Expected Outcomes**

*Describe the expected outcomes of this project on seniors and people with disabilities. Why is this project the best method to address the previously described need? Max 2,500 characters/approx. 400 words*

## **2017-2019 STF Grant Application for Projects Located Within Marion and Polk Counties**

PCL expects to see a decrease in vehicle costs which will directly translate to more funding to fulfill PCL's mission of enhancing the quality of life for those we support. This includes people with disabilities in the community outside of PCL's services. An opportunity to provide better services, due to the lessening need of committed funds to an aging vehicle fleet, and creating the opportunity for more people to benefit from PCL's programs within the local communities would be a direct result of receiving the requested grant funding. Due to certain levels of disabilities the use of public transportation can be limited. Public transportation schedules do not always meet the need of the person supported due to appointments that do not coincide with public transportation schedules. The use of private transportation allows for experienced assistance to better serve the person with a disability. Finally, in order for this population to be contributing members of their community they need to have access to transportation that will allow this goal to be realized.

**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

**2. Project impact on four goals of transit**

**a.) Describe the project's impact on access.**

*Access includes the ability of seniors and people with disabilities to travel to employment opportunities, community services, education, healthcare, etc., and to safely arrive at and depart their transit stop.*

PCL uses its fleet of vehicles for a variety of travel needs for the people supported that may have. The ability to utilize a new vehicle for these purposes would allow for consistent responses to the needs of the people receiving supports (i.e. if the vehicle is in need of repair and is out of service, it cannot be used to meet these needs). It would give more capabilities and options for the various programs/residences within PCL to be able to accomplish professional, personal goals and necessary travel needs more easily.

**b.) Describe the project's impact on availability.**

*Availability includes spatial availability (service close to me), time availability (service when I need it), and the size of the service area.*

The impact from being able to replace a vehicle would only improve the ability to increase both spatial and time availabilities by way of allowing more appointments, outings, various meetings, etc. to be scheduled and completed. The area in which PCL provides services would not be increased on this factor alone. However, the successful granting of this project would allow for more opportunities for people to attend more functions, go on longer trips and increase the amount of trips able to be taken thus increasing the amount of people that would benefit from the new vehicle.

**c.) Describe the project's impact on connectivity.**

*Connectivity includes the integration of services (routes, schedules, fare structures, information systems, modal transfer facilities).*

The impact this project would have is to help grow the relationship between PCL and other local organizations that provides services to people with developmental and intellectual disabilities and, of course, the people themselves. PCL would continue to include other people with activities and opportunities to be involved with their local communities. Due to the nature of the operations of the PCL fleet there are no routes, fees or systems that would be impacted by the granting of funds to purchase a new vehicle.

**d.) Describe this project's impact on economic development.**

*Economic development includes public transportation's contribution to providing connections for workers to employers, reducing congestion, influencing land use choice and land values, and providing employment opportunities.*

**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

Because this would not be considered part of any public transportation system the only real legitimate impact to economic development would be in the area of employment opportunities. The vehicle, in some cases, would be used as a shuttle to provide transportation for the people PCL directly supports by transporting to and from jobs, meetings with local and state agencies that PCL works with to realize success around efforts to find employment and transportation to meet with potential employers.

**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

**3. Project Budget**

Enter all costs involved in the **total** cost of the project.

Type	Amount
Labor (payroll)	\$0.00
Contracted services	\$0.00
Materials and supplies	\$0.00
Operations	\$0.00
Preventive maintenance	\$0.00
Capital equipment	\$41,078.00
Technology (conversion price)	\$17,225.00
Other (Oregon GPC discount)	-\$6,100.00
Other (additional equipment)	\$900.00
Other (shipping)	\$750.00
Other (fees)	\$363.00
<b>Project Total</b> (right click and select "Update Field" to correct total)	\$54,216.00
Amount requested in this grant	\$54,216.00

**4. Provide the timeline of the project in the following table**

	Step Description	Completion Date
1	Order Vehicle	July, 2017
2	Conversion Process Completed	August, 2017
3	Take Possession of Vehicle	October, 2017
4	Internal PCL Vehicle Preparation	October, 2017
5	Operational Timing	October, 2017
6	Placement of Vehicle	October, 2017

**5. Is your application for a replacement vehicle?**

X Yes (continue to #6)     No (go on to Section C)

**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

6. Enter the following information about each vehicle to be replaced if the total cost of the vehicle is being requested:

Vehicle Category*	Qty (#)	Cost Each (\$)	Total (\$)	No. Seats w/ADA Deployed	No. of ADA Stations	Total Capacity	Fuel Type*	Estimated Order Date	Estimated Delivery Date*
E-2	1	\$54,216	\$54,216	6	3	7	G	July, 2017	October, 2017
4T									
4T									
4T									
4T									
<b>Totals:</b>	<b>1</b>	<b>Grand Total:</b>	<b>\$54,216</b>						

\***Vehicle Category Descriptions:** <http://www.oregon.gov/ODOT/PT/resources/guidance-library/vehicle-descriptions-usefullife-standards.pdf>

\***Fuel Type Options:** (G) Gas, (D) Diesel, (B) Biodiesel, (HG) Hybrid-gas, (HD) Hybrid-diesel, (CNG) Compressed Natural Gas, (OF) Other alternative Fuel.

\***Estimated Delivery Date:** Minimum 160 days if ADA accessible.



**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

**C. ORGANIZATIONAL CERTIFICATION**

By submitting this document via email to Cherriots, I certify that the submitted materials and data included are complete, true and correct. Also, I certify that my organization is:

- Eligible to enter into agreements with Cherriots;
- Has the legal, managerial and operational capacity to do the work to be paid for by the STF;
- Not debarred or suspended from federal grants;
- In compliance with federal, state and local laws and regulations including, and not limited to, those pertaining to passenger transportation, civil rights, labor, insurance, safety and health, as applicable;
- Complies with the laws or rules of the STF Program;
- Properly uses and accounts for the STF; and
- Will operate the project or service in a safe, prudent and timely manner.

Director of Employment, Business and Community Development

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Signature of Authorized Organization Officer

Title

Date

**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

**Private Nonprofit Agency – Corporation Status Inquiry and Certification**

If your agency or organization is claiming eligibility as a Section 5310 or STF Program applicant based on its status as a private nonprofit organization, you must obtain verification of its incorporation number and current legal standing from the Oregon Secretary of State Information Retrieval/ Certification & Records Unit (IRC Unit). The “Status Inquiry” document must be attached as an appendix to the application. To assist your agency or organization in obtaining this information, use one of these two methods:

To obtain Corporate Records Information over the Internet, go to: <http://sos.oregon.gov/business/Pages/find.aspx> Enter the name of your agency or organization. If its status is active, print the page and submit it as proof.

**Private Non-profits**

Legal Name of Non-profit Applicant: Partnerships in Community Living, Inc.

State of Oregon Articles of Incorporation Number: 062773-88

Date of Incorporation: 02/03/1987

**Certifying Representative**

Name (print): Gary Zenzen	
Title (print): Director of Employment, Business and Community Development	
Signature:	Date:

# 2017-2019 STF Grant Application for Projects Located Within Marion and Polk Counties

## RACIAL AND ETHNIC IMPACT STATEMENT

**This form is used for informational purposes only and must be included with the grant application.**

Chapter 600 of the 2013 Oregon Laws require applicants to include with each grant application a racial and ethnic impact statement. The statement provides information as to the disproportionate or unique impact the proposed policies or programs may have on minority persons in the State of Oregon if the grant is awarded to a corporation or other legal entity other than natural persons.

1. The proposed grant project policies or programs could have a disproportionate or unique positive impact on the following minority persons:

Indicate all that apply:

- Women
- Persons with Disabilities
- African-Americans
- Hispanics
- Asians or Pacific Islanders
- American Indians
- Alaskan Natives

2. The proposed grant project policies or programs could have a disproportionate or unique negative impact on the following minority persons:

Indicate all that apply:

- Women
- Persons with Disabilities
- African-Americans
- Hispanics
- Asians or Pacific Islanders
- American Indians
- Alaskan Natives

3. The proposed grant project policies or programs will have no disproportionate or unique impact on minority persons.

If you checked numbers 1 or 2 above, on a separate sheet of paper, provide the rationale for the existence of policies or programs having a disproportionate or unique impact on minority persons in this state. Further provide evidence of consultation with representative(s) of the affected minority persons.

I HEREBY CERTIFY on this \_\_\_ day of \_\_\_\_\_, 20\_\_\_, the information contained on this form and any attachment is complete and accurate to the best of my knowledge.

Signature:

Printed Name: Gary Zenzen

Title: Director of Employment, Business and Community Development

1 "Minority persons" are defined in SB 463 (2013 Regular Session) as women, persons with disabilities (as defined in ORS 174.107), African-Americans, Hispanics, Asians or Pacific islanders, American Indians, and Alaskan Natives.

## Marion and Polk Counties STF Discretionary Program Grant Application

The rationale behind providing policies or programs that have a disproportionate or unique impact on minority persons, in this case specifically for persons with disabilities, is to create situations where people have opportunities and assistance in achieving their goals and growing into the person they wish to be. This is viewed by PCL as being a right for every person regardless of race, ethnicity, social status or any sort of disability.

Supplying a support system that fosters the dignity and independence for a diverse and vulnerable population is of the utmost importance to meet the needs of people with varying disabilities while still enabling them to live independently with minimal supports. The proposed project is a direct result of this ideal.

Interviews of people supported by PCL, family members and community members have been done to measure the effectiveness of the support services provided. Here a few of the responses:

“People have been very receptive, capable and realistic. I appreciate their willingness to work with us on visits. Working with us on transportation to visits and understanding and flexibility to understand that he is safe with us and getting to have normal family interaction.” – family member

“I like the way PCL is a community and I like the way they integrate into the community.” – family member

“I really feel they care. I like the quality of staff. I like that PCL is big enough to offer a lot of things, but not so big that they forget about the people. I like that they have a van available.” – family member

Internal Revenue Service

Department of the Treasury

P. O. Box 2508  
Cincinnati, OH 45201

Date: September 10, 2001

Person to Contact:  
Cheryl Skaggs 31-04010  
Customer Service Representative  
Toll Free Telephone Number:  
8:00 a.m. to 9:30 p.m. EST  
877-829-5500  
Fax Number:  
513-263-3756  
Federal Identification Number:  
93-0980637

Partnerships in Community Living, Inc.  
P. O. Box 129  
Monmouth, OR 97361-0129

Dear Sir or Madam:

This is in response to the amendment to your organization's Articles of Incorporation filed with the state on December 24, 1997. We have updated our records to reflect the name change as indicated above. This letter will take the place of the copy you requested.

Our records indicate that a determination letter issued in November 1988, granted your organization exemption from federal income tax under section 501(c)(3) of the Internal Revenue Code. That letter is still in effect.

Based on information subsequently submitted, we classified your organization as one that is not a private foundation within the meaning of section 509(a) of the Code because it is an organization described in sections 509(a)(1) and 170(b)(1)(A)(vi).

This classification was based on the assumption that your organization's operations would continue as stated in the application. If your organization's sources of support, or its character, method of operations, or purposes have changed, please let us know so we can consider the effect of the change on the exempt status and foundation status of your organization.

Your organization is required to file Form 990, Return of Organization Exempt from Income Tax, only if its gross receipts each year are normally more than \$25,000. If a return is required, it must be filed by the 15th day of the fifth month after the end of the organization's annual accounting period. The law imposes a penalty of \$20 a day, up to a maximum of \$10,000, when a return is filed late, unless there is reasonable cause for the delay.

All exempt organizations (unless specifically excluded) are liable for taxes under the Federal Insurance Contributions Act (social security taxes) on remuneration of \$100 or more paid to each employee during a calendar year. Your organization is not liable for the tax imposed under the Federal Unemployment Tax Act (FUTA).

Organizations that are not private foundations are not subject to the excise taxes under Chapter 42 of the Code. However, these organizations are not automatically exempt from other federal excise taxes.

Donors may deduct contributions to your organization as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to your organization or for its use are deductible for federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

Partnerships in Community Living, Inc.  
93-0980637

Your organization is not required to file federal income tax returns unless it is subject to the tax on unrelated business income under section 511 of the Code. If your organization is subject to this tax, it must file an income tax return on the Form 990-T, Exempt Organization Business Income Tax Return. In this letter, we are not determining whether any of your organization's present or proposed activities are unrelated trade or business as defined in section 513 of the Code.

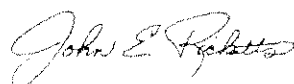
The law requires you to make your organization's annual return available for public inspection without charge for three years after the due date of the return. You are also required to make available for public inspection a copy of your organization's exemption application, any supporting documents and the exemption letter to any individual who requests such documents in person or in writing. You can charge only a reasonable fee for reproduction and actual postage costs for the copied materials. The law does not require you to provide copies of public inspection documents that are widely available, such as by posting them on the Internet (World Wide Web). You may be liable for a penalty of \$20 a day for each day you do not make these documents available for public inspection (up to a maximum of \$10,000 in the case of an annual return).

Because this letter could help resolve any questions about your organization's exempt status and foundation status, you should keep it with the organization's permanent records.

If you have any questions, please call us at the telephone number shown in the heading of this letter.

This letter affirms your organization's exempt status.

Sincerely,



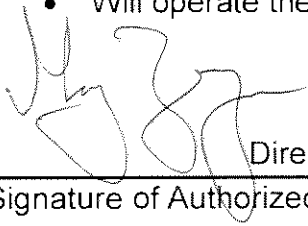
John E. Ricketts, Director, TE/GE  
Customer Account Services

**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

**C. ORGANIZATIONAL CERTIFICATION**

By submitting this document via email to Cherriots, I certify that the submitted materials and data included are complete, true and correct. Also, I certify that my organization is:

- Eligible to enter into agreements with Cherriots;
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- Not debarred or suspended from federal grants;
- In compliance with federal, state and local laws and regulations including, and not limited to, those pertaining to passenger transportation, civil rights, labor, insurance, safety and health, as applicable;
- Complies with the laws or rules of the STF Program;
- Properly uses and accounts for the STF; and
- Will operate the project or service in a safe, prudent and timely manner.



Director of Employment, Business and Community Development

11/30/17.

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Signature of Authorized Organization Officer

Title

Date

**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

**Private Nonprofit Agency – Corporation Status Inquiry and Certification**

If your agency or organization is claiming eligibility as a Section 5310 or STF Program applicant based on its status as a private nonprofit organization, you must obtain verification of its incorporation number and current legal standing from the Oregon Secretary of State Information Retrieval/ Certification & Records Unit (IRC Unit). The "Status Inquiry" document must be attached as an appendix to the application. To assist your agency or organization in obtaining this information, use one of these two methods:

To obtain Corporate Records Information over the Internet, go to:  
<http://sos.oregon.gov/business/Pages/find.aspx> Enter the name of your agency or organization. If its status is active, print the page and submit it as proof.

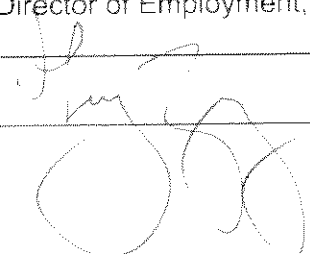
**Private Non-profits**

Legal Name of Non-profit Applicant: Partnerships in Community Living, Inc.

State of Oregon Articles of Incorporation Number: 062773-88

Date of Incorporation: 02/03/1987

**Certifying Representative**

Name (print): Gary Zenzen	
Title (print): Director of Employment, Business and Community Development	
Signature: 	Date: 1/30/17



**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

**RACIAL AND ETHNIC IMPACT STATEMENT**

**This form is used for informational purposes only and must be included with the grant application.**

Chapter 600 of the 2013 Oregon Laws require applicants to include with each grant application a racial and ethnic impact statement. The statement provides information as to the disproportionate or unique impact the proposed policies or programs may have on minority persons in the State of Oregon if the grant is awarded to a corporation or other legal entity other than natural persons.

1. The proposed grant project policies or programs could have a disproportionate or unique positive impact on the following minority persons:

Indicate all that apply:

- Women
- Persons with Disabilities
- African-Americans
- Hispanics
- Asians or Pacific Islanders
- American Indians
- Alaskan Natives

2. The proposed grant project policies or programs could have a disproportionate or unique negative impact on the following minority persons:

Indicate all that apply:

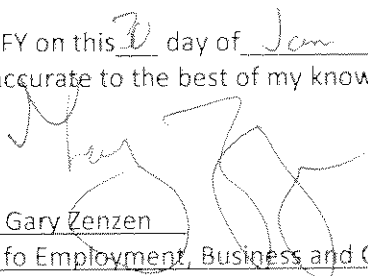
- Women
- Persons with Disabilities
- African-Americans
- Hispanics
- Asians or Pacific Islanders
- American Indians
- Alaskan Natives

3. The proposed grant project policies or programs will have no disproportionate or unique impact on minority persons.

If you checked numbers 1 or 2 above, on a separate sheet of paper, provide the rationale for the existence of policies or programs having a disproportionate or unique impact on minority persons in this state. Further provide evidence of consultation with representative(s) of the affected minority persons.

I HEREBY CERTIFY on this 30 day of Jan, 2017, the information contained on this form and any attachment is complete and accurate to the best of my knowledge.

Signature:



Printed Name: Gary Zenzen

Title: Director of Employment, Business and Community Development

1 "Minority persons" are defined in SB 463 (2013 Regular Session) as women, persons with disabilities (as defined in ORS 174.107), African-Americans, Hispanics, Asians or Pacific islanders, American Indians, and Alaskan Natives.

## Business Registry Business Name Search

Business Entity Names returned for:

Name: PARTNERSHIPS IN COMMUNITY LIVING

Using: Exact Words in Any Word Order

For Active and Inactive businesses.

[New Search](#)

01-30-2017  
10:40

Record No	<a href="#">Entity Type</a>	<a href="#">Entity Status</a>	<a href="#">Registry Number</a>	<a href="#">Name Status</a>	Name	<a href="#">Assoc Search</a>
1	DNP	ACT	<a href="#">062773-88</a>	CUR	<a href="#">PARTNERSHIPS IN COMMUNITY LIVING INC.</a>	

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**2017-2019 Special Transportation  
Fund (STF) Grant Application  
for Projects Located Within Marion and  
Polk Counties**



**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

**INTRODUCTION**

- Read page 4 of the *Special Transportation Fund Instructions* for project and agency eligibility. The instructions are available on the ODOT Rail and Public Transit website: (<http://www.oregon.gov/ODOT/PT/Pages/news.aspx>).
- Use the instructions as a reference while filling out the application form.
- Each project submitted for funding consideration must have its own application.
- Selection criteria are detailed in Section 5 of the *Application Instructions*.
- This form must be filled out using Microsoft Word and submitted as a Word or Adobe .pdf document. Paper applications will NOT be accepted.
- Signature pages should be scanned and attached as separate pages to each application.

**Submittal Checklist**

***Make sure***

- ✓ Application is complete, signed, and dated

***Submit***

- ✓ Proof of agency status (template included in application packet)
- ✓ Ethnic and Racial Impact Statement
- ✓ Maintenance Plan (if submitting an application for preventive maintenance)

**A. ORGANIZATION INFORMATION**

**Name of Organization:** Salem Health West Valley Foundation

**Contact Person:** Leilani Slama

**Address:** PO Box 14001 Salem, OR 97309

**Telephone:** 503-814-3781

**Email:** [leilani.slama@salemhealth.org](mailto:leilani.slama@salemhealth.org)

**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

**Type of Organization (check one)**

Government Agency	<input type="checkbox"/>
Private Not-for-Profit	<input checked="" type="checkbox"/>
Other	<input type="checkbox"/>

**Area of service (check one)**

Inside Marion and Polk Counties	<input checked="" type="checkbox"/>
Outside Marion and Polk Counties	<input type="checkbox"/>
Both inside and outside Marion and Polk Counties	<input type="checkbox"/>

**Organization Days and Hours of Operation**

Day	Hours
Sunday	12:00 a.m. – 11:59 p.m.
Monday	12:00 a.m. – 11:59 p.m.
Tuesday	12:00 a.m. – 11:59 p.m.
Wednesday	12:00 a.m. – 11:59 p.m.
Thursday	12:00 a.m. – 11:59 p.m.
Friday	12:00 a.m. – 11:59 p.m.
Saturday	12:00 a.m. – 11:59 p.m.
Please list any planned periods of service closure greater than 3 days (i.e., closed the week between Christmas Day and New Year's Day)	West Valley Hospital is open seven days a week, 24 hours a day with no scheduled closures.

**Total transportation program costs by year**

FY16 (historical data, if applicable)	FY17 (projected, if applicable)	FY18 (projected)	FY19 (projected)
\$57,535	\$70,710	\$72,830	\$75,000

**B. PROJECT INFORMATION**

**Project Title** *(will be used for reviewer reference and in public comment process. Example: Mobility Management for The Confederated Tribes of Grand Ronde)*

Connections Van providing medical transportation
--

**Project service area to be served** *(indicate the geographic features that define your service area such as streets, rivers, or jurisdictional boundaries)*

North boundary	As far as Grand Ronde
West boundary	As far as Grand Ronde/Falls City
South boundary	As far as Falls City/Monmouth
East boundary	Independence
Other general geographic area (i.e., within the City of Woodburn)	All of Dallas and surrounding areas

*Optional: please provide a map of your service area as a separate single page 8.5"x11"*

**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

attachment.

**Total STF funds requested**

\$61,484
----------

**Start date**

Currently running on 2015-17 SKT Grant; hope to continue uninterrupted service
--

**Funding request type (check one)**

Continuation of existing service at same level of service	x <input type="checkbox"/>
Expansion of existing service	<input type="checkbox"/>
New service	<input type="checkbox"/>
Capital request	<input type="checkbox"/>
Other	<input type="checkbox"/>

**Total Grant fund needs by year**

	FY17	FY18	FY19
STF project	\$-	\$30,288	\$31,196

**Scalable STF Grant Request by Year**

*You are strongly encouraged to request the full amount of funding that is needed for each project, including funding for new projects; however, funding is limited. Describe the scalability of your STF funding request, how you scaled down your request and what aspects of the program would not be funded under this funding scenario below. Then enter your scaled down request amounts.*

<i>Scalability Description:</i> Hourly wage (\$14.56) for driver plus benefits, with a 3% cost of living increase calculated for FY 2018.
---

	FY17	FY18	FY19	Total
Scaled request: see above total grant funds needed by year	\$	\$	\$	\$

**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

Identify the project's additional sources of funding in the table below:

Estimated Additional Project Resources	
Source of Funds	Dollar Amount
2017-2019 STF Program Request ( <i>Important!</i> )	\$61,484
Local Resources	\$86,346
Federal Resources	\$ -
Other (provide description):	\$ -
<b>Project Grand Total</b>	<b>\$147,830</b>

The award of this STF Grant will enable federal funds to be brought to the project.

**Coordinated Plan**

Is project derived from the *Cherriots Coordinated Public Transit – Human Services Transportation Plan* dated August, 2016?  Yes  No If yes, what page(s)? 53, 55

If no, explain why the project is not part of the Coordinated Plan.  
*For example: Is the project part of another plan (please name)? Is the plan still being finalized?*

**1. Project Description**

**a.) Describe services or capital investment to be provided by STF funding.** The Connections Van medical transportation program fills a specific need for on-demand, door to door patient transportation to the six medical service locations most used in the West Valley area. Connections Van riders do not have the endurance or ability to utilize the scheduled routes of the CARTS system or do not qualify for TripLink. The Connections Van can be scheduled on short notice and has two different types of vehicles to accommodate the needs of West Valley patients. Thanks to a generous grant from the Salem-Keizer Transit District in 2015, the program has been elevated with a part time paid employee who both drives and schedules and trains the volunteer drivers. A new van was purchased for the program in July 2016 by the Salem Health West Valley Foundation, replacing a vehicle that had reached the end of its useful life. The new van was to accommodate a bariatric lift and bariatric wheelchairs. The Foundation also covers the cost of the fuel and maintenance for the vehicles and West Valley Hospital provides dispatch, volunteer management and maintenance staff.

Include a description of the following:

- **Who you will serve?** The Connections Van medical transportation program at Salem Health West Valley serves medically fragile, low income community members seeking medical transportation to access health services offered by Salem Health West Valley in Polk County. For those without access to transportation, the program transports them to and from medical appointments, including rehabilitation, wound care, primary care appointments, lab, x-ray and more.

**2017-2019 STF Grant Application  
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- **What geographic area you will serve?** The Connections Van program has both a bus and a van providing rides in the West Valley primary service area, reaching west to Grand Ronde, south to Falls City and including Independence and Monmouth as well as all of Dallas.

- **What level of service will be provided to customers?**

Rides are provided door to door and wheelchair, stretcher, car seat accessible and bariatric lift are all available in both vehicles providing rides. Additionally, the driver can wait for the patient or return at the appropriate time so the patient isn't spending long hours waiting for a ride home following their appointment. There are few options available for public transit in the West Valley area and those who are medically fragile or have mobility devices are more likely to cancel an appointment because they simply can't get there, potentially endangering their wellbeing.

- **Operational activities; how will customers request and receive rides, including scheduling and dispatching?**

Providers, care givers and patients can call or refer to service; a dispatcher will schedule the door to door rides as needed.

- Describe if volunteers will be utilized to provide service and how this will occur (will the volunteer program be supported with STF or other funds? Will you provide mileage reimbursement to volunteers using their own vehicles?).

A total of 10 volunteers assist the program by driving the bus or van during the time the paid driver is scheduling or training volunteers. The volunteers allow both the van and the bus to provide rides simultaneously and with expanded hours. SHWV has a Volunteer Coordinator who recruits volunteers, tracks hours and manages paperwork of the volunteers. SHWV maintenance staff provide maintenance on the vehicles and SHWV Foundation covers the cost of fuel and ongoing maintenance.

- How will the service be marketed?

The service is well known throughout the community. Advertising is found within the health care clinics, providers and care givers refer to the service and information about the Connections Van is prominently displayed in the hospital and on the vehicles themselves.

**b.) Will your project activities preserve existing service and/or provide new service?**

*Describe how the project preserves existing service or provides new or expanded service, limit 200 words*

Both preserve and expand. The SKT grant awarded to the Connections Van allowed for a half time employee to manage the program for the first time ever and we have seen the number of volunteers and riders sky rocket. This is clearly meeting a significant need in the West Valley community. A second grant supporting this program would allow us to expand the driver to a full time position, driving 80% of the time and training, scheduling and recruiting volunteers the remaining 20% of the time. Without the grant, the paid position will be eliminated and the service will scale back significantly, potentially not being able to meet the needs of the community.



**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

**c.) Will you coordinate between providers to avoid duplication? Describe what level of coordination between partners is done and how duplication is avoided, limit 200 words**

Salem Health West Valley is committed to coordinating existing services and expanding community capacity to improve access to medical transportation. Staff strive to connect community members with the most affordable and medically acceptable option to meet their medical transportation needs. Limited options for medical transportation include private transport, public transit, community volunteers and funds provided by WVCH are all considered in the process. Providers are well aware of the need this services meets in the community and work to avoid wasting limited resources.

**d.) Is your project cost- effective?**

*Describe average cost per ride, cost per mile and cost per hour, limit 200 words*

The numbers are approximate, but the average cost per ride is \$8.17; cost per mile \$1.30 and cost per hour is \$12.00. The cost per mile is perhaps the most telling of these numbers: the Connections Van is getting to patients who live in extremely remote and underserved areas like Falls City and Grand Ronde. Without the Connections Van, patients living in these areas would not have access to health care of any kind.

**e.) Project Quality**

*Describe the need for this project. How was this need determined or assessed? Max 2,500 characters/approx. 400 words*

Transportation remains a significant barrier when it comes to access to health care. Acutely ill patients are rarely able to access public transportation options even when they are available; those living in remote areas with limited means struggle even when medical conditions do not create additional barriers. Nausea from treatment, disorientation and paralysis due to recent stroke and open wounds may require intravenous medicine and complex sterile dressing changes, which are not easily managed by a friend or taxi driver. In addition, ability to pay continues to be a problem for many utilizing the current Connections Van resources. Without this program, important medical needs such as preventative care, rehabilitation appointments and wound care may go unattended, endangering health and increasing potential that a patient may need more advanced, and more expensive, medical care.

**f.) Expected Outcomes**

*Describe the expected outcomes of this project on seniors and people with disabilities. Why is this project the best method to address the previously described need? Max 2,500 characters/approx. 400 words*

**2017-2019 STF Grant Application  
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Over 80% of the population utilizing this service are seniors or people with disabilities. Due to the lack of transportation alternatives, continuing to provide this service, and expanding it where possible is essential to the health of the underserved in the West Valley community. With two vehicles operated primarily by volunteers and maintained at the cost of the hospital foundation and a dispatcher scheduling the rides at the cost of the health system, the minimal investment of a coordinator to drive, as well as train and schedule volunteers allows for over 300 people every month to access transportation when and where they need it.

**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

**2. Project impact on four goals of transit**

**a.) Describe the project's impact on access.**

*Access includes the ability of seniors and people with disabilities to travel to employment opportunities, community services, education, healthcare, etc., and to safely arrive at and depart their transit stop.*

The Connections Van program provides seniors and people with disabilities access to much needed medical appointments on a timely basis for very little cost, which in turn allows them to potentially work, attend school and earn a living. The door to door service offered through the Connections Van program is more than a trip to and from an appointment. The drivers come to know the patients, can identify other barriers to health care and advocate for them.

**b.) Describe the project's impact on availability.**

*Availability includes spatial availability (service close to me), time availability (service when I need it), and the size of the service area.*

The Connections Van program covers a very large geographic area that is also extremely remote, poor and underserved. Requests are granted same day and when possible, drivers wait for patients so they can take them home immediately following their appointment. Other than a personal driver, there is no transportation option as available as this service in the West Valley community.

**c.) Describe the project's impact on connectivity.**

*Connectivity includes the integration of services (routes, schedules, fare structures, information systems, modal transfer facilities).*

The service is door to door, same day and takes the patient where they need to be at the right time. The population utilizing this service needs the flexibility to be taken directly from home to medical clinic and home again.

**d.) Describe this project's impact on economic development.**

*Economic development includes public transportation's contribution to providing connections for workers to employers, reducing congestion, influencing land use choice and land values, and providing employment opportunities.*

The loss of productivity to the US economy due to acute and chronic illness in the workforce has been estimated at \$160 billion annually.

Limited access to health services results in poor health outcomes. When transportation is not available, low income, senior and disabled individuals may not be able to obtain preventative health care services. Often health concerns go untreated, problems worsen and in some cases, result in chronic conditions that require on-going, expensive and complicated treatment. Ensuring patients have access to scheduled preventative care, early detection and screening services as well as treatment appointments is essential to prevent chronic disease and maintain health.

**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

**3. Project Budget**

Enter all costs involved in the **total** cost of the project.

Type	Amount
Labor (payroll)	\$61,484
Contracted services	\$0.00
Materials and supplies	\$5,000
Operations	\$0.00
Preventive maintenance	\$6,000.00
Capital equipment	\$0.00
Technology	\$0.00
Other (conversion price)	\$0.00
Other (additional equipment)	\$0.00
Other (shipping)	\$0.00
Other (fees)	\$0.00
<b>Project Total (right click and select "Update Field" to correct total)</b>	<b>\$72,484.00</b>
<b>Amount requested in this grant</b>	<b>\$61,484</b>

**4. Provide the timeline of the project in the following table**

	<b>Step Description</b>	<b>Completion Date</b>
<b>1</b>	This is a continuation of a highly successful program so upon receipt of funds, the program will simply continue.	ongoing
<b>2</b>		
<b>3</b>		
<b>4</b>		
<b>5</b>		
<b>6</b>		

**5. Is your application for a replacement vehicle?**

**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

Yes (continue to #6)     No (go on to Section C)

**6. Enter the following information about each vehicle to be replaced if the total cost of the vehicle is being requested:N/A**

<b>Vehicle Category*</b>	<b>Qty (#)</b>	<b>Cost Each (\$)</b>	<b>Total (\$)</b>	<b>No. Seats w/ADA Deployed</b>	<b>No. of ADA Stations</b>	<b>Total Capacity</b>	<b>Fuel Type*</b>	<b>Estimated Order Date</b>	<b>Estimated Delivery Date*</b>
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
<b>Totals:</b>		<b>Grand Total:</b>	<b>0</b>						

**\*Vehicle Category Descriptions:** <http://www.oregon.gov/ODOT/PT/resources/guidance-library/vehicle-descriptions-usefullife-standards.pdf>

**\*Fuel Type Options:** (G) Gas, (D) Diesel, (B) Biodiesel, (HG) Hybrid-gas, (HD) Hybrid-diesel, (CNG) Compressed Natural Gas, (OF) Other alternative Fuel.

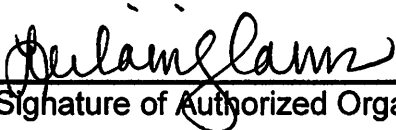
**\*Estimated Delivery Date:** Minimum 160 days if ADA accessible.

**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

**C. ORGANIZATIONAL CERTIFICATION**

By submitting this document via email to Cherriots, I certify that the submitted materials and data included are complete, true and correct. Also, I certify that my organization is:

- Eligible to enter into agreements with Cherriots;
- Has the legal, managerial and operational capacity to do the work to be paid for by the STF;
- Not debarred or suspended from federal grants;
- In compliance with federal, state and local laws and regulations including, and not limited to, those pertaining to passenger transportation, civil rights, labor, insurance, safety and health, as applicable;
- Complies with the laws or rules of the STF Program;
- Properly uses and accounts for the STF; and
- Will operate the project or service in a safe, prudent and timely manner.

	Vice President of Community Engagement	1/27/17
Signature of Authorized Organization Officer	Title	Date

**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

**Private Nonprofit Agency – Corporation Status Inquiry and Certification**

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<http://sos.oregon.gov/business/Pages/find.aspx> Enter the name of your agency or organization. If its status is active, print the page and submit it as proof.


**Private Non-profits**

Legal Name of Non-profit Applicant: West Valley Hospital Foundation (DBA:Salem Health West Valley Foundation)

State of Oregon Articles of Incorporation Number: 760029-80

Date of Incorporation: 6/21/2000

**Certifying Representative**

Name (print): Leilani Slama	
Title (print): Vice President of Community Engagement	
Signature: 	Date: 1/27/17

**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

**RACIAL AND ETHNIC IMPACT STATEMENT**

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- African-Americans
- Hispanics
- Asians or Pacific Islanders
- American Indians
- Alaskan Natives

3. The proposed grant project policies or programs will have no disproportionate or unique impact on minority persons.

If you checked numbers 1 or 2 above, on a separate sheet of paper, provide the rationale for the existence of policies or programs having a disproportionate or unique impact on minority persons in this state. Further provide evidence of consultation with representative(s) of the affected minority persons.

I HEREBY CERTIFY on this 26 day of Jan, 2017 the information contained on this form and any attachment is complete and accurate to the best of my knowledge.

Signature: 

Printed Name: Leilani Slama

Title: Vice President of Community Engagement

1 "Minority persons" are defined in SB 463 (2013 Regular Session) as women, persons with disabilities (as defined in ORS 174.107), African-Americans, Hispanics, Asians or Pacific islanders, American Indians, and Alaskan Natives.



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### Business Name Search

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### Business Entity Data

01-26-2017  
11:13

Registry Nbr	Entity Type	Entity Status	Jurisdiction	Registry Date	Next Renewal Date	Renewal Due?
1207352-95	ABN	ACT		04-14-2016	04-14-2018	
<b>Entity Name</b>	SALEM HEALTH WEST VALLEY FOUNDATION					
<b>Foreign Name</b>						
<b>Affidavit?</b>	N					

[New Search](#) [Printer Friendly](#)

### Associated Names

<b>Type</b>	PPB	PRINCIPAL PLACE OF BUSINESS			
<b>Addr 1</b>	525 SE WASHINGTON ST				
<b>Addr 2</b>					
<b>CSZ</b>	DALLAS	OR	97338	<b>Country</b>	UNITED STATES OF AMERICA

The Authorized Representative address is the mailing address for this business.

Type	REP	AUTHORIZED REPRESENTATIVE	Start Date	04-14-2016	Resign Date
<b>Name</b>	CHERYL	NESTER	WOLFE		
<b>Addr 1</b>	890 OAK ST SE				
<b>Addr 2</b>					
<b>CSZ</b>	SALEM	OR	97301	<b>Country</b>	UNITED STATES OF AMERICA




<b>Type</b>	REG	REGISTRANT		
<b>Of Record</b>	<a href="#">760029-80</a>	WEST VALLEY HOSPITAL FOUNDATION		
<b>Addr 1</b>	525 SE WASHINGTON ST			
<b>Addr 2</b>				
<b>CSZ</b>	DALLAS	OR	97338	<b>Country</b> UNITED STATES OF AMERICA

[New Search](#) [Printer Friendly](#) **Name History**

<b>Business Entity Name</b>	<a href="#">Name Type</a>	<a href="#">Name Status</a>	<b>Start Date</b>	<b>End Date</b>
SALEM HEALTH WEST VALLEY FOUNDATION	EN	CUR	04-14-2016	

Please [read](#) before ordering [Copies](#).

[New Search](#) [Printer Friendly](#) **Summary History**

<b>Image Available</b>	<b>Action</b>	<b>Transaction Date</b>	<b>Effective Date</b>	<a href="#">Status</a>	<b>Name/Agent Change</b>	<b>Dissolved By</b>
	AMENDMENT OF REGISTRATION	01-20-2017		FI		
	AMENDMENT OF REGISTRATION	09-08-2016		FI		
	APPLICATION FOR REGISTRATION	04-14-2016		FI	Representative	

[New Search](#) [Printer Friendly](#) **Counties**

**Counties Filed**

All Counties Filed.

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For comments or suggestions regarding the operation of this site, please contact : [corporation.division@state.or.us](mailto:corporation.division@state.or.us)

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### Business Name Search

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### Business Entity Data

01-26-2017

11:14

Registry Nbr	Entity Type	Entity Status	Jurisdiction	Registry Date	Next Renewal Date	Renewal Due?
760029-80	DNP	ACT	OREGON	06-21-2000	06-21-2017	
<b>Entity Name</b>	WEST VALLEY HOSPITAL FOUNDATION					
<b>Foreign Name</b>						
<b>Non Profit Type</b>	PUBLIC BENEFIT WITH MEMBERS					

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### Associated Names

<b>Type</b>	PPB	PRINCIPAL PLACE OF BUSINESS			
<b>Addr 1</b>	525 SE WASHINGTON ST				
<b>Addr 2</b>					
<b>CSZ</b>	DALLAS	OR	97338	<b>Country</b>	UNITED STATES OF AMERICA

Please click [here](#) for general information about registered agents and service of process.

<b>Type</b>	AGT	REGISTERED AGENT	<b>Start Date</b>	05-25-2016	<b>Resign Date</b>	
<b>Name</b>	LEILANI	SLAMA				
<b>Addr 1</b>	525 SE WASHINGTON ST					
<b>Addr 2</b>						
<b>CSZ</b>	DALLAS	OR	97338	<b>Country</b>	UNITED STATES OF AMERICA	

<b>Type</b>	MAL	MAILING ADDRESS				
<b>Addr 1</b>	PO BOX 378					
<b>Addr 2</b>						
<b>CSZ</b>	DALLAS	OR	97338	<b>Country</b>	UNITED STATES OF AMERICA	

<b>Type</b>	PRE	PRESIDENT				<b>Resign Date</b>	
<b>Name</b>	MITCH	RATZLAFF					
<b>Addr 1</b>	525 SE WASHINGTON ST						










<b>Addr 2</b>					
<b>CSZ</b>	DALLAS	OR	97338		<b>Country</b> UNITED STATES OF AMERICA
<b>Type</b>	SEC	SECRETARY			<b>Resign Date</b>
<b>Name</b>	DARIN	SILBERNAGEL			
<b>Addr 1</b>	525 SE WASHINGTON ST				
<b>Addr 2</b>					
<b>CSZ</b>	DALLAS	OR	97338		<b>Country</b> UNITED STATES OF AMERICA



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<b>Business Entity Name</b>	<a href="#">Name Type</a>	<a href="#">Name Status</a>	<b>Start Date</b>	<b>End Date</b>
WEST VALLEY HOSPITAL FOUNDATION	EN	CUR	07-25-2003	
VALLEY COMMUNITY HOSPITAL FOUNDATION	EN	PRE	06-21-2000	07-25-2003

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<b>Image Available</b>	<b>Action</b>	<b>Transaction Date</b>	<b>Effective Date</b>	<a href="#">Status</a>	<b>Name/Agent Change</b>	<b>Dissolved By</b>
	AMENDED ANNUAL REPORT	05-25-2016		FI	Agent	
	AMNDMT TO ANNUAL RPT/INFO STATEMENT	06-19-2015		FI	Agent	
	AMENDED ANNUAL REPORT	06-19-2015		FI		
	AMENDED ANNUAL REPORT	05-23-2014		FI		
	AMNDMT TO ANNUAL RPT/INFO STATEMENT	07-08-2013		FI		
	AMENDED ANNUAL REPORT	06-24-2013		FI		
	AMENDED ANNUAL REPORT	05-21-2012		FI		
	AMENDED ANNUAL REPORT	06-16-2011		FI		
	AMENDED ANNUAL REPORT	06-01-2010		FI		

	AMNDMT TO ANNUAL RPT/INFO STATEMENT	05-27-2009		FI		
	AMENDED ANNUAL REPORT	05-27-2009		FI		
	ANNUAL REPORT	07-08-2008		FI		
	NOTICE LATE ANNUAL	06-27-2008		SYS		
	ANNUAL REPORT	06-06-2007		FI		
	AMNDMT TO ANNUAL RPT/INFO STATEMENT	06-19-2006		FI		
	ANNUAL REPORT PAYMENT	06-06-2006		SYS		
	AMNDMT TO ANNUAL RPT/INFO STATEMENT	05-24-2005		FI		
	ANNUAL REPORT PAYMENT	05-19-2005		SYS		
	ANNUAL REPORT PAYMENT	05-10-2004		SYS		
	AMNDMT TO ANNUAL RPT/INFO STATEMENT	07-31-2003		FI		
	ANNUAL REPORT	07-31-2003		FI		
	RESTATED ARTICLES	07-31-2003		FI	Agent	
	ARTICLES OF AMENDMENT	07-25-2003		FI	Name	
	NOTICE LATE ANNUAL	06-27-2003		SYS		
	ANNUAL REPORT PAYMENT	06-03-2002		SYS		
	AMENDED ANNUAL REPORT	05-22-2001		FI		
	NB AMENDMENT	12-07-2000		FI		
	NEW FILING	06-21-2000		FI		

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**2017-2019 Special Transportation  
Fund (STF) Grant Application  
for Projects Located Within Marion and  
Polk Counties**



**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

**INTRODUCTION**

- Read page 4 of the *Special Transportation Fund Instructions* for project and agency eligibility. The instructions are available on the ODOT Rail and Public Transit website: (<http://www.oregon.gov/ODOT/PT/Pages/news.aspx>).
- Use the instructions as a reference while filling out the application form.
- Each project submitted for funding consideration must have its own application.
- Selection criteria are detailed in Section 5 of the *Application Instructions*.
- This form must be filled out using Microsoft Word and submitted as a Word or Adobe .pdf document. Paper applications will NOT be accepted.
- Signature pages should be scanned and attached as separate pages to each application.

**Submittal Checklist**

***Make sure***

- ✓ Application is complete, signed, and dated

***Submit***

- ✓ Proof of agency status (template included in application packet)
- ✓ Ethnic and Racial Impact Statement
- ✓ Maintenance Plan (if submitting an application for preventive maintenance)

**A. ORGANIZATION INFORMATION**

**Name of Organization: Salem Health**

**Contact Person: Sharon Heuer**

**Address: PO Box 14001, Salem, OR 97352**

**Telephone: 503-814-1580**

**Email: [Sharon.heuer@salemhealth.org](mailto:Sharon.heuer@salemhealth.org)**

**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

**Type of Organization (check one)**

Government Agency	<input type="checkbox"/>
Private Not-for-Profit	<input checked="" type="checkbox"/>
Other	<input type="checkbox"/>

**Area of service (check one)**

Inside Marion and Polk Counties	<input checked="" type="checkbox"/>
Outside Marion and Polk Counties	<input type="checkbox"/>
Both inside and outside Marion and Polk Counties	<input type="checkbox"/>

**Organization Days and Hours of Operation**

Day	Hours
Sunday	12:01 AM – 12:00 PM
Monday	12:01 AM – 12:00 PM
Tuesday	12:01 AM – 12:00 PM
Wednesday	12:01 AM – 12:00 PM
Thursday	12:01 AM – 12:00 PM
Friday	12:01 AM – 12:00 PM
Saturday	12:01 AM – 12:00 PM
Please list any planned periods of service closure greater than 3 days (i.e., closed the week between Christmas Day and New Year's Day)	Salem Health operates two hospitals, 24 hours a day, 365 days each year. There are no planned service closures

**Total transportation program costs by year**

FY16 (historical data, if applicable)	FY17 (projected, if applicable)	FY18 (projected)	FY19 (projected)
\$ 67,565		\$ 58,560	60,317

**B. PROJECT INFORMATION**

**Project Title** (will be used for reviewer reference and in public comment process. Example: *Mobility Management for The Confederated Tribes of Grand Ronde*)

Salem Health Medical Transportation Coordinator
---

**Project service area to be served** (indicate the geographic features that define your service area such as streets, rivers, or jurisdictional boundaries)

North boundary	
West boundary	
South boundary	
East boundary	
Other general geographic area (i.e., within the City of Woodburn)	All of Marion and Polk Counties



**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

*Optional:* please provide a map of your service area as a separate single page 8.5"x11" attachment.

**Total STF funds requested**

\$ 82,335

**Start date**

07/01/2017

**Funding request type (check one)**

Continuation of existing service at same level of service	<input checked="" type="checkbox"/>
Expansion of existing service	<input type="checkbox"/>
New service	<input type="checkbox"/>
Capital request	<input type="checkbox"/>
Other	<input type="checkbox"/>

**Total Grant fund needs by year**

	FY17	FY18	FY19
STF project		\$40,560	\$41,775

**Scalable STF Grant Request by Year**

*You are strongly encouraged to request the full amount of funding that is needed for each project, including funding for new projects; however, funding is limited. Describe the scalability of your STF funding request, how you scaled down your request and what aspects of the program would not be funded under this funding scenario below. Then enter your scaled down request amounts.*

*Scalability Description: Salary cost for medical transportation coordinator (\$15/hr plus benefits; 3% increase each year*

	FY17	FY18	FY19	Total
Scaled request:		\$ 40,560	\$ 41,775	\$82,335

**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

Identify the project's additional sources of funding in the table below:

Estimated Additional Project Resources	
Source of Funds	Dollar Amount
2017-2019 STF Program Request ( <i>Important!</i> )	\$ 82,335
Local Resources	\$ 36,542
Federal Resources	\$
Other (provide description):	\$
Project Grand Total	\$ 118,877

The award of this STF Grant will enable federal funds to be brought to the project.

**Coordinated Plan**

Is project derived from the *Cherriots Coordinated Public Transit – Human Services Transportation Plan* dated August, 2016?  Yes  No If yes, what page(s)?

52, 53, 55, 59

If no, explain why the project is not part of the Coordinated Plan.

*For example: Is the project part of another plan (please name)? Is the plan still being finalized?*

**1. Project Description**

a.) Describe services or capital investment to be provided by STF funding. Include a description of the following:

- Who you will serve?
- What geographic area you will serve?
- What level of service will be provided to customers?
- Operational activities; how will customers request and receive rides, including scheduling and dispatching?
- Describe if volunteers will be utilized to provide service and how this will occur (will the volunteer program be supported with STF or other funds? Will you provide mileage reimbursement to volunteers using their own vehicles?).
- How will the service be marketed?

**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

In 2015, Salem Health became the medical transportation coordination program funded in part by Salem Keizer Transit, Special Transit Fund. In the first year of the program, 2252 community members were served. It is anticipated that Salem Health will double ridership by June 2017.

**Who do you serve?** Salem Health services medically fragile, low income community members seeking health services at any one of the Salem Health entities. The majority of those served are seniors or disabled, riders are acutely or chronic ill and most have limited mobility. The coordinator is bilingual/bicultural. Services information is provided in English and Spanish. In addition, the coordinator has 24 hour access to the language line, which offers telephonic translation services through a conference bridge line. The most common languages accessed using the language line are Russian and Marshallese dialects.

**What geographic area you will serve?** Rides are provided to community members living in Marion and Polk County zip codes.

**Operational activities; how will customers request and receive rides, including scheduling and dispatching?** Rides are provided door to door and wheelchair, stretcher, car seats accessible vehicles are provided based on the need of the rider. Same day rides are available when needed. Rides are requested at the time the medical appointment is scheduled. The SKT funded transportation coordinator, discusses options with the patient. Public transportation options are offered, as well as information about travel training and Cherri lift. Acutely ill patients; those undergoing chemotherapy, other cancer treatments and wound care rarely choose public transit options. For these patients, the medical transportation coordinator arranges transport through NEMT or a Salem Health funded provider.

**Describe if volunteers will be utilized to provide service and how this will occur (will the volunteer program be supported with STF or other funds)**

The Salem Health Medical Transportation coordinator looks to the American Cancer Society's volunteer program "Road to Recovery" to assist with rides for cancer patients. In addition, Salem Health provided \$50,000 to Northwest Human Services in 2016 for purchase of a van to transport homeless patients to and from medical services. NWHS provides these rides free of charge for the homeless. Lastly, Salem Health operates the Connections Van and Polk County. The Connections Van utilizes volunteer and paid staff.

**How will the service be marketed?** The Salem Health schedulers offer transportation to any low income or medically fragile patient that identifies transportation as a barrier at the time of appointment registration. In addition, if a patient cancels an appointment due to transportation, every effort is made to connect that patient with a ride. Clinicians, especially those providing wound care, cancer services and neuromuscular rehabilitation (those working with stroke patients, and individuals with neurological and developmental disabilities) are aware that medical transportation is available. Clinicians often refer patients to the transportation coordinator.

**b.) Will your project activities preserve existing service and/or provide new service?**

*Describe how the project preserves existing service or provides new or expanded service, limit 200 words*

**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

Salem Hospital is committed to coordinating existing services and expanding community capacity to improve access to medical transportation. In 2016, Salem Hospital, through its Community Partnership Grant program, provided funding to Northwest Human Services to purchase a van to transport homeless community members to medical, dental and behavioral health appointments at West Salem Clinic. Likewise, the hospital has entered into a partnership with several local transportation providers to fund transportation for low income patients requiring same day medical transport and those with no insurance coverage for transportation. The transportation coordinator assists medically fragile and those with mental health barriers in obtaining non-emergent medical transportation that is funded by Willamette Valley Community Health (WVCH). When medically possible, patients are connected with Redline, Cherri-lift and fixed routes. The coordinator works with West Salem Hospital and offers medical transportation service throughout Polk County using the Connections Van. Lastly, patients receiving cancer care services are connected with the American Cancer Society, volunteer program "Road to Recovery".

**c.) Will you coordinate between providers to avoid duplication? Describe what level of coordination between partners is done and how duplication is avoided, limit 200 words**

The transportation coordinator connects community members with the most affordable and medically acceptable option to meet their medical transportation needs. The project coordinates existing transportation resources including medical transportation provided by non-emergent, medical transportation, the American Cancer Society's Road to Recovery program, West Valley Hospital's Connections Van, public transportation and private transport. Patients with WVCH benefits receive services from non-emergent medical transport as long as their appointment is not on a weekend, holiday or scheduled for the same day. Cancer care patients are linked to Road to Recovery when possible. Patients are offered public transportation options and if these do not work for them, they are then offered deeply discounted taxi cab rates. When ability to pay is identified as a transportation barrier, Salem Health subsidizes the taxi ride. In Polk County, Salem Health patients often receive transportation via the Connections Van.

**d.) Is your project cost-effective?**

*Describe average cost per ride, cost per mile and cost per hour, limit 200 words*

**2017-2019 STF Grant Application  
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In 2015, Salem Health received a STF grant for \$50,000. The grant was used to develop a transportation coordination program, engage stakeholders, educate patients and provide services. In the first year, 2279 rides were coordinated. The cost per ride for Salem Keizer Transit was \$21.94.

As of December 2016, half-way through the fiscal year, the Salem Health transportation coordinator has arranged 2557 rides and the cost of the coordinator from the Special Transit Fund has been \$16,000. So far this year, the cost for coordination per has been \$6.26. In 2016, the Salem Health coordinator has leveraged more community dollars to support the project and local resources are used to provide the service, decreasing the cost/ride for SKT.

**e.) Project Quality**

*Describe the **need** for this project. How was this need determined or assessed? Max 2,500 characters/approx. 400 words*

Transportation remains a significant barrier when it comes to access to healthcare. It is anticipated that the coordinator will arrange 4,000 rides in 2017 for medically fragile, low income and elderly community members seeking services at Salem Health.

Acutely ill patients rarely are able to access public transportation options. Nausea from cancer treatment; disorientation and paralysis due to a recent stroke; and open wounds requiring daily intravenous medicine and complex sterile dressing changes are common problems noted when patients are asked why they are not able to walk to a bus stop.

In addition, ability to pay continues to be a barrier for those that need cab services. In 2016, roughly 90% of patients received subsidized or free transportation. Transport was funded through an insurance benefit, the Salem Health Foundation or a volunteer coordinated organization like Road to Recovery. When public transportation was not an option and no other community resource was available to meet the patient's needs, he/she was offered a cab ride. A \$5.00 donation is suggested. For many, even \$5.00 was a burden, especially when low income patients on those on fixed incomes, required daily medical visits for an extended period of time.

**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

**f.) Expected Outcomes**

*Describe the expected outcomes of this project on seniors and people with disabilities. Why is this project the best method to address the previously described need? Max 2,500 characters/approx. 400 words*

The transportation coordination project focuses on medical transportation. It is estimated that the proposed Salem Health medical transportation coordination program will ensure that 4,000 low income, elderly and medically fragile patients receive on demand transportation to medical transportation in 2017.

This is the best method to address medical transportation needs because there are very few barriers. In 2016, the Salem Health medical transportation coordinator was able to help 100% percent of patients referred for a ride to and from a medical appointment. Transportation is provided on holidays, weekends and in the evening when needed. Same day rides are available if necessary. Cost is never a barrier, due to Salem Health Foundation funding.

The coordinator is able to access public, private and volunteer transportation services.

**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

**2. Project impact on four goals of transit**

**a.) Describe the project's impact on access.**

*Access includes the ability of seniors and people with disabilities to travel to employment opportunities, community services, education, healthcare, etc., and to safely arrive at and depart their transit stop.*

The transportation coordination project focuses on medical transportation. It is estimated that the proposed Salem Health medical transportation coordination program will ensure that 4,000 low income, elderly and medically fragile patients receive on demand transportation to medical transportation in 2017.

In 2016, the Salem Health medical transportation coordinator was able to help 100% percent of patients referred for a ride to and from a medical appointment. Transportation is provided on weekends and in the evening when needed. Same day rides are available if necessary. Cost is never a barrier, due to Salem Health Foundation funding. The coordinator serves as a hub and is able to access public, private and volunteer transportation services.

The program serves patients from every zip code in the two county region. Door to door transport is not limited to the urban growth boundry.

**b.) Describe the project's impact on availability.**

*Availability includes spatial availability (service close to me), time availability (service when I need it), and the size of the service area.*

The Salem Health, medical transportation program coordinates rides to and from any Salem Health hospital, primary care clinics or ambulatory services. The coordinator works M-F, 8:30 – 5:00 PM; however rides are provided whenever the community member needs transport to and from Salem Health medical appointments. Same day service can be arranged if an urgent need is identified. The Salem Health Transportation coordinator allows parents to bring children to appointments if necessary. Contracted transportation providers can accommodate wheelchairs and stretchers and child safety seats. Rides are coordinated for low income and elderly community members that live in Marion and Polk Counties. The program has served riders from every zip-code (urban and rural) within the counties.

**c.) Describe the project's impact on connectivity.**

*Connectivity includes the integration of services (routes, schedules, fare structures, information systems, modal transfer facilities.*

**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

All community members are informed about public transportation options to and from their medical appointments. When barriers to using public transportation are identified by the community member, the coordinator arranges on demand service. The service is provided door to door. In most cases, transportation service is provided at no cost to the community member. Willamette Valley Community Health provides medical transportation as a covered benefit and the Salem Health Foundation generously subsidizes rides for community members that do not have the ability to pay for transportation to medical appointments.

**d.) Describe this project's impact on economic development.**

*Economic development includes public transportation's contribution to providing connections for workers to employers, reducing congestion, influencing land use choice and land values, and providing employment opportunities.*

The loss of productivity to the U.S. economy due to acute and chronic illness in the workforce has been estimated at \$160 billion annually.

Limited access to health services results in poor health outcomes. When transportation is not available, low income, senior and disabled individuals may be unable to obtain preventative healthcare services. Often health concerns go untreated, problems worsen and in some cases, result in chronic conditions that require on-going, expensive and complicated treatment.

Ensuring that patients have access to scheduled preventative care, early detection and screening services as well as treatment appointments is essential to prevent chronic disease and maintain health.



**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

**3. Project Budget**

Enter all costs involved in the **total** cost of the project.

Type	Amount
Labor (payroll)	\$ 82,335
Contracted services	\$
Materials and supplies	\$
Operations	\$ 36,542
Preventive maintenance	\$
Capital equipment	\$
Technology	\$
Other (conversion price)	\$
Other (additional equipment)	\$
Other (shipping)	\$
Other (fees)	\$
<b>Project Total (right click and select "Update Field" to correct total)</b>	<b>\$ 118,877</b>
Amount requested in this grant	\$ 82, 335

**4. Provide the timeline of the project in the following table**

	Step Description	Completion Date
<b>1</b>	<b>Services will continue with the new funding cycle beginning 7/1/2017</b>	<b>6/30/2019</b>
<b>2</b>		
<b>3</b>		
<b>4</b>		
<b>5</b>		
<b>6</b>		

**5. Is your application for a replacement vehicle?**

**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

Yes (continue to #6)     No (go on to Section C)

**6. Enter the following information about each vehicle to be replaced if the total cost of the vehicle is being requested:**

<b>Vehicle Category*</b>	<b>Qty (#)</b>	<b>Cost Each (\$)</b>	<b>Total (\$)</b>	<b>No. Seats w/ADA Deployed</b>	<b>No. of ADA Stations</b>	<b>Total Capacity</b>	<b>Fuel Type*</b>	<b>Estimated Order Date</b>	<b>Estimated Delivery Date*</b>
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
<b>Totals:</b>		<b>Grand Total:</b>	<b>0</b>						

**\*Vehicle Category Descriptions:** <http://www.oregon.gov/ODOT/PT/resources/guidance-library/vehicle-descriptions-usefullife-standards.pdf>

**\*Fuel Type Options:** (G) Gas, (D) Diesel, (B) Biodiesel, (HG) Hybrid-gas, (HD) Hybrid-diesel, (CNG) Compressed Natural Gas, (OF) Other alternative Fuel.

**\*Estimated Delivery Date:** Minimum 160 days if ADA accessible.



**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

**Private Nonprofit Agency – Corporation Status Inquiry and Certification**

If your agency or organization is claiming eligibility as a Section 5310 or STF Program applicant based on its status as a private nonprofit organization, you must obtain verification of its incorporation number and current legal standing from the Oregon Secretary of State Information Retrieval/ Certification & Records Unit (IRC Unit). The "Status Inquiry" document must be attached as an appendix to the application. To assist your agency or organization in obtaining this information, use one of these two methods:

To obtain Corporate Records Information over the Internet, go to:  
<http://sos.oregon.gov/business/Pages/find.aspx> Enter the name of your agency or organization. If its status is active, print the page and submit it as proof.

**Private Non-profits**

Legal Name of Non-profit Applicant: *Salem Health Foundation*

State of Oregon Articles of Incorporation Number: *080695-10*

Date of Incorporation: *May 18, 1967*

**Certifying Representative**

Name (print): <i>Leilani Slama</i>	
Title (print): <i>Vice President, Community Relations Engagement</i>	
Signature: <i>Leilani Slama</i>	Date: <i>1/25/17</i>

**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

**RACIAL AND ETHNIC IMPACT STATEMENT**

This form is used for informational purposes only and must be included with the grant application.

Chapter 600 of the 2013 Oregon Laws require applicants to include with each grant application a racial and ethnic impact statement. The statement provides information as to the disproportionate or unique impact the proposed policies or programs may have on minority persons in the State of Oregon if the grant is awarded to a corporation or other legal entity other than natural persons.

1. The proposed grant project policies or programs could have a disproportionate or unique positive impact on the following minority persons:

Indicate all that apply:

- Women
- Persons with Disabilities
- African-Americans
- Hispanics
- Asians or Pacific Islanders
- American Indians
- Alaskan Natives

2. The proposed grant project policies or programs could have a disproportionate or unique negative impact on the following minority persons:


Indicate all that apply:

- Women
- Persons with Disabilities
- African-Americans
- Hispanics
- Asians or Pacific Islanders
- American Indians
- Alaskan Natives

3. The proposed grant project policies or programs will have no disproportionate or unique impact on minority persons.

If you checked numbers 1 or 2 above, on a separate sheet of paper, provide the rationale for the existence of policies or programs having a disproportionate or unique impact on minority persons in this state. Further provide evidence of consultation with representative(s) of the affected minority persons.

I HEREBY CERTIFY on this 26 day of Jan, 2017 the information contained on this form and any attachment is complete and accurate to the best of my knowledge.

Signature: 

Printed Name: Leilani Slama

Title: Vice President, Community Relations

1 "Minority persons" are defined in SB 463 (2013 Regular Session) as women, persons with disabilities (as defined in ORS 174.107), African-Americans, Hispanics, Asians or Pacific islanders, American Indians, and Alaskan Natives.

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### Business Entity Data

01-25-2017

10:51

Registry Nbr	Entity Type	Entity Status	Jurisdiction	Registry Date	Next Renewal Date	Renewal Due?
080695-10	DNP	ACT	OREGON	05-18-1967	05-18-2017	
<b>Entity Name</b>	SALEM HEALTH FOUNDATION					
<b>Foreign Name</b>						
<b>Non Profit Type</b>	PUBLIC BENEFIT					

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### Associated Names

<b>Type</b>	PPB	PRINCIPAL PLACE OF BUSINESS			
<b>Addr 1</b>	698 12TH ST SE STE 100				
<b>Addr 2</b>					
<b>CSZ</b>	SALEM	OR	97301	<b>Country</b>	UNITED STATES OF AMERICA

*Please click [here](#) for general information about registered agents and service of process.*

<b>Type</b>	AGT	REGISTERED AGENT	<b>Start Date</b>	05-03-2016	<b>Resign Date</b>	
<b>Name</b>	LEILANI SLAMA					
<b>Addr 1</b>	698 12TH ST SE STE 100					
<b>Addr 2</b>						
<b>CSZ</b>	SALEM	OR	97301	<b>Country</b>	UNITED STATES OF AMERICA	

<b>Type</b>	MAL	MAILING ADDRESS				
<b>Addr 1</b>	PO BOX 14001					
<b>Addr 2</b>						
<b>CSZ</b>	SALEM	OR	97309	5014	<b>Country</b>	UNITED STATES OF AMERICA

<b>Type</b>	PRE	PRESIDENT	<b>Resign Date</b>	
<b>Name</b>	ROBERT PONEC			
<b>Addr 1</b>	PO BOX 14001			









<b>Addr 2</b>					
<b>CSZ</b>	SALEM	OR	97309	5014	<b>Country</b> UNITED STATES OF AMERICA
<b>Type</b>	SEC SECRETARY				<b>Resign Date</b>
<b>Name</b>	KATHY	GORDON			
<b>Addr 1</b>	PO BOX 14001				
<b>Addr 2</b>					
<b>CSZ</b>	SALEM	OR	97309	5014	<b>Country</b> UNITED STATES OF AMERICA






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<b>Business Entity Name</b>	<b>Name Type</b>	<b>Name Status</b>	<b>Start Date</b>	<b>End Date</b>
SALEM HEALTH FOUNDATION	EN	CUR	01-20-2017	
SALEM HOSPITAL FOUNDATION	EN	PRE	01-05-1970	01-20-2017
SALEM MEMORIAL HOSPITAL FOUNDATION	EN	PRE	05-18-1967	01-05-1970





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	AMNDMT TO ANNUAL RPT/INFO STATEMENT	05-03-2016		FI	Agent	
	AMENDED ANNUAL REPORT	05-03-2016		FI		
	AMNDMT TO ANNUAL RPT/INFO STATEMENT	04-20-2015		FI	Agent	
	AMENDED ANNUAL REPORT	04-20-2015		FI		
	AMNDMT TO ANNUAL RPT/INFO STATEMENT	04-21-2014		FI		
	AMENDED ANNUAL REPORT	04-16-2014		FI		
	AMNDMT TO ANNUAL RPT/INFO STATEMENT	04-16-2013		FI		

	AMENDED ANNUAL REPORT	04-16-2013		FI		
	AMENDED ANNUAL REPORT	04-12-2012		FI		
	AMENDED ANNUAL REPORT	05-02-2011		FI		
	AMNDMT TO ANNUAL RPT/INFO STATEMENT	05-03-2010		FI		
	AMENDED ANNUAL REPORT	05-03-2010		FI		
	AMENDED ANNUAL REPORT	04-22-2009		FI		
	AMNDMT TO ANNUAL RPT/INFO STATEMENT	04-15-2008		FI		
	ANNUAL REPORT	04-15-2008		FI		
	AMENDED ANNUAL REPORT	04-23-2007		FI		
	AMNDMT TO ANNUAL RPT/INFO STATEMENT	04-28-2006		FI		
	ANNUAL REPORT PAYMENT	04-25-2006		SYS		
	AMNDMT TO ANNUAL RPT/INFO STATEMENT	04-15-2005		FI		
	ANNUAL REPORT PAYMENT	04-12-2005		SYS		
	ANNUAL REPORT PAYMENT	04-15-2004		SYS		
	AMNDMT TO ANNUAL RPT/INFO STATEMENT	04-15-2003		FI		
	ANNUAL REPORT PAYMENT	04-11-2003		SYS		
	AMNDMT TO ANNUAL RPT/INFO STATEMENT	06-07-2002		FI		
	CHANGE OF REGISTERED AGENT/ADDRESS	04-11-2002		FI	Agent	
	AMNDMT TO ANNUAL RPT/INFO STATEMENT	04-11-2002		FI		



	ANNUAL REPORT PAYMENT	04-08-2002		SYS		
	ANNUAL REPORT PAYMENT	05-14-2001		SYS		
	CHANGED RENEWAL	04-21-2000		FI		
	STRAIGHT RENEWAL	04-13-2000		FI		
	CHANGED RENEWAL	05-14-1999		FI		
	STRAIGHT RENEWAL	05-11-1999		FI		
	STRAIGHT RENEWAL	04-21-1998		FI		
	CHANGED RENEWAL	04-21-1998		FI		
	STRAIGHT RENEWAL	04-28-1997		FI		
	CHANGED RENEWAL	04-28-1997		FI		
	STRAIGHT RENEWAL	04-15-1996		FI		
	CHANGED RENEWAL	04-15-1996		FI		
	AMENDED RENEWAL	05-03-1995		FI		
	AMENDED RENEWAL	04-21-1994		FI		
	AMENDED RENEWAL	05-07-1993		FI		
	AMENDED RENEWAL	04-22-1992		FI		
	AMENDED RENEWAL	04-29-1991		FI		
	AMENDED RENEWAL	04-30-1990		FI		
	STRAIGHT RENEWAL	05-10-1989		FI		
	AMENDED RENEWAL	04-13-1988		FI		
	AMENDED RENEWAL	04-29-1987		FI		
	AMENDED RENEWAL	04-22-1986		FI		
	STRAIGHT RENEWAL	04-02-1985		FI		
	NOTICE	07-16-1984		FI		
	NOTICE	07-16-1984		FI		
	IMAGE AMENDMENT	06-29-1983		FI		
	ENTITY NAME CHANGE	01-05-1970		FI		
	IMAGE AMENDMENT	10-23-1967		FI		
	IMAGE NEW	05-18-1967		FI		

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**2017-2019 Special Transportation  
Fund (STF) Grant Application  
for Projects Located Within Marion and  
Polk Counties**



**2017-2019 Special Transportation Fund (STF) Grant Application for Projects Located  
Within Marion and Polk Counties**

**INTRODUCTION**

- Read the *2017-2019 Section STF Grant Application Instructions* prior to completing this application.
- Each project submitted for funding consideration must have its own application.
- Selection criteria are detailed in the *Application Instructions*.
- This form must be filled out using Microsoft Word and submitted as a Word or Adobe .pdf document. Paper applications will NOT be accepted.
- Signature pages should be scanned and attached as separate pages to each application.

**Submittal Checklist**

***Make sure***

- ✓ Application is complete, signed, and dated

***Submit***

- ✓ Proof of agency status (template included in application packet)
- ✓ Ethnic and Racial Impact Statement
- ✓ Maintenance Plan (if submitting an application for preventive maintenance)

**A. ORGANIZATION INFORMATION**

**Name of Organization: Salem Area Mass Transit District**

**Contact Person: Trish Bunsen**

**Address: 555 Court Street NE Ste. 5230**

**Telephone: 503.361.7531**

**Email: trisha.bunsen@cherriots.org**

**2017-2019 Special Transportation Fund (STF) Grant Application for Projects Located  
Within Marion and Polk Counties**

**Type of Organization (check one)**

Government Agency	<input type="checkbox"/>
Private Not-for-Profit	<input type="checkbox"/>
Other Public Transit District	<input checked="" type="checkbox"/>

**Area of service (check one)**

Inside Marion and Polk Counties	<input type="checkbox"/>
Outside Marion and Polk Counties	<input type="checkbox"/>
Both inside and outside Marion and Polk Counties	<input checked="" type="checkbox"/>

**Organization Days and Hours of Operation**

<b>Day</b>	<b>Hours</b>
Sunday	N/A
Monday	5:00 am-12:20 am
Tuesday	5:00 am-12:20 am
Wednesday	5:00 am-12:20 am
Thursday	5:00 am-12:20 am
Friday	5:00 am-12:20 am
Saturday	10:00am –4:00pm call center only
Please list any planned periods of service closure greater than 3 days (i.e., closed the week between Christmas Day and New Year’s Day)	

**Total transportation program costs by year**

FY16 (historical data, if applicable)	FY17 (projected, if applicable)	FY18
38,878,585	42,178,000	\$45,974,020

**B. PROJECT INFORMATION**

**Project Title** *(will be used for reviewer reference and in public comment process. Example: Mobility Management for XYZ volunteer driver program)*

Operations (CARTS, Cherylift, RedLine), grant match, contingency
--

**Project service area to be served** *(indicate the geographic features that define your service area such as streets, rivers, or jurisdictional boundaries)*

North boundary	
West boundary	
South boundary	
East boundary	
Other general geographic area (i.e., within the City of Woodburn)	Inside the Salem-Keizer Transit Urban Growth Boundary in addition to the counties of Marion, Polk, and Linn

**2017-2019 Special Transportation Fund (STF) Grant Application for Projects Located  
Within Marion and Polk Counties**

*Optional: please provide a map of your service area as a separate single page 8.5"x11" attachment.*

**Total Section STF(ODOT) funds requested**

1,489,898
-----------

**Start date**

July 1, 2017
--------------

**Funding request type (check one)**

Continuation of existing service at same level of service	<input checked="" type="checkbox"/>
Expansion of existing service	<input type="checkbox"/>
New service	<input type="checkbox"/>
Capital request	<input type="checkbox"/>
Other	<input type="checkbox"/>

**Project Service Types (check all that apply) *What type of service will be supported with the STF(ODOT) grant?***

A. Open to the general public at all times	<input checked="" type="checkbox"/>
B. Open only to seniors and individuals with disabilities	<input checked="" type="checkbox"/>
C. Demand response	<input checked="" type="checkbox"/>
D. Open to the general public on a space-available basis	<input type="checkbox"/>
E. Limited to defined clientele (i.e., residential home)	<input type="checkbox"/>
F. Deviated route	<input checked="" type="checkbox"/>
G. Other (commuter):	<input checked="" type="checkbox"/>

**Project Types (check all that apply) *Select the project types that you wish to include in your application.***

A. Purchased service/service operations	<input checked="" type="checkbox"/>
B. Federal grant match	<input checked="" type="checkbox"/>
C. Contingency	<input checked="" type="checkbox"/>
D. STF Administration	<input checked="" type="checkbox"/>
E. Capitalized Vehicle Preventive Maintenance	<input type="checkbox"/>
F. Equipment	<input type="checkbox"/>
G. Signs and Other Amenities	<input type="checkbox"/>
H. Passenger Shelters	<input type="checkbox"/>
I. Facilities (Bus Barns and Other Buildings)	<input type="checkbox"/>

**Scalable Section STF(ODOT) Grant Request**

*You are strongly encouraged to request the full amount of funding that is needed for each project, including funding for new projects; however, funding is limited. Describe the scalability of your*

**2017-2019 Special Transportation Fund (STF) Grant Application for Projects Located Within Marion and Polk Counties**

*STF(ODOT) funding request, how you scaled down your request and what aspects of the program would not be funded under this funding scenario below. Then enter your scaled down request amounts.*

**Scalability Description:**  
 Without STF funding, Cherrylift and REDline match would need to be funded from our general fund and the CARTS program would be eliminated without another local source of match identified. The scaled request eliminates Contingency request and a portion of Cherrylift funding(part of purchased service).

	FY18	FY19	
Scaled request:	\$694,949	\$694,949	\$

**Identify the project’s additional sources of funding in the table below**

<b>Estimated Additional Project Resources</b>	
<b>Source of Funds</b>	<b>Dollar Amount</b>
2017-2019 STF Program Request ( <i>Important!</i> )	\$1,489,898
Local Resources	
Federal Resources Purchased Service ODOT 5310,5311, FTA 5310	\$1,947,172
Other (provide description):	\$
<b>Project Grand Total</b>	<b>3,437,068</b>

**Coordinated Plan**

Is project derived from the *Cherriots Coordinated Public Transit – Human Services Transportation Plan* dated August, 2016?  Yes  No If yes, what page(s)? 67

If no, explain why the project is not part of the Coordinated Plan.

*For example: Is the project part of another plan (please name)? Is the plan still being finalized?*

**1. Project Description**

**a.) Describe services or capital investment to be provided by Section STF(ODOT) funding.** Include a description of the following:

- Who you will serve?

## 2017-2019 Special Transportation Fund (STF) Grant Application for Projects Located Within Marion and Polk Counties

- What geographic area you will serve?
- What level of service will be provided to customers?
- Operational activities; how will customers request and receive rides, including scheduling and dispatching?
- Describe if volunteers will be utilized to provide service and how this will occur (will the volunteer program be supported with STF(ODOT) or other funds? Will you provide mileage reimbursement to volunteers using their own vehicles?).
- How will the service be marketed?

Cherriots is requesting funds for operating for the transportation services of CARTS, CherryLift (our urban area complementary paratransit), and RED Line (shopper shuttle and dial-a-ride) programs. In addition, funds are requested for federal grants match that serve elderly and persons with disabilities and contingency for increasing operating costs. STF Administration line is allowed for the STF Agency and will provide oversight of the STF grant and coordination.

The contingency line item is needed to account for the increase in costs over the next two years due to a new contract for the contracted service operations and additional maintenance of CARTS/RED Line and CherryLift buses. As buses age, the cost of preventative maintenance increases.

The match amount is used to satisfy the local match requirement for the following federal grant programs serving seniors and individuals with disabilities:

- §5307 (Americans with Disabilities Act portion of Urbanized Area Formula Program)
- §5310 (Enhanced Mobility of Seniors and Individuals with Disabilities)
- §5311 (Rural Transit Assistance Program)
- §5317 (New Freedom)

Chemeketa Area Regional Transportation Service (CARTS) provides deviated fixed route, flex route and dial-a-ride services in the rural areas of Marion and Polk Counties. The service is operated Monday through Friday from 6:00 AM to 8:00 PM. This service connects seniors, people with disabilities, low income, and the general public with 16 communities. Customers use CARTS to connect with employment, education, medical services, and social or recreational opportunities. CARTS operates five routes: Woodburn to Salem, Silverton to Salem, South Marion County to Salem, Polk County, and the Dallas Express to Salem. Additionally, two flex routes; one in Polk County and one in North Marion County. The routes are set up to spend 15 – 30 minutes in each community boarding and deboarding passengers and then travel to the next city, connecting rural communities along the way. Service is curb to curb and customers call the Cherriots Call Center formerly known as TripLink at least 24 hours prior to schedule a pick up. The South Marion dial-a-ride service connects four cities. The three dial-a-ride routes do not travel to Salem.

CherryLift is the complementary ADA paratransit service provided by Salem Area Mass Transit within the urban growth boundaries of Salem and Keizer. The funds will be used to support

**2017-2019 Special Transportation Fund (STF) Grant Application for Projects Located  
Within Marion and Polk Counties**

CherryLift Operations. Currently SAMTD contracts with MV Transportation to provide this service. CherryLift is an origin to destination service for people who are unable to use the Cherriots fixed-route bus service because of a disabling condition. An application process to determine eligibility is required. Service is provided Monday through Friday from 5:00 AM - 10:00 PM. The fare is \$3.20 for each ride. Reservations for a CherryLift ride can be made up to two weeks in advance and at least 24 hours before the needed ride. Reservations are made through the Cherriots Call Center which is also housed at SAMTD.

RED Line provides a shopper service and dial a ride service to seniors and people with disabilities within the urban growth boundaries of Salem and Keizer. RED Line operates shopping trips each day from various segments of the region. Customers call the Cherriots Call Center up to two weeks in advance to reserve their spot on the shuttle. RED Line picks customers up at their home and travels to a predetermined location. Shuttles provide service once in the morning and once in the afternoon from each region. Stores have been selected with criteria for one-stop services (groceries, pharmacy, household supplies) along with customer requests. Each area or neighborhood is provided approximately 75 minutes at the store in their region before returning home. On the return trip, RED Line bus operators will assist customers with their groceries. Examples of locations are Winco, Fred Meyer and Wal-Mart. Not only does this public service provide a necessary trip to the store, it also provides a social outlet to many who have limited means of transportation and are generally at home alone. This transportation is open to any senior or person with disability without a qualifying interview. RED Line service is for seniors age 60+ and persons with disabilities whom may or may not be eligible for ADA paratransit services, which may include low-income populations and senior housing communities. Also available is a Dial-A-Ride service. These trips can be reserved up to two weeks in advance; however same day requests are taken if room is available. RED Line is open Monday through Friday from 7:00 AM to 6:30 PM. RED Line observes the same holiday closures as Cherriots.

Transportation services are marketed through social media channels; the web; targeted geographic location mailers; advertisements in local newspapers, and the promotion of transportation services and programs at informational tables and community presentation opportunities.

**b.) Will your project activities preserve existing service and/or provide new service?**

*Describe how the project preserves existing service or provides new or expanded service, limit 200 words*

Preserve existing service
---------------------------

**c.) Will you coordinate between providers to avoid duplication? Describe what level of coordination between partners is done and how duplication is avoided, limit 200 words**



**2017-2019 Special Transportation Fund (STF) Grant Application for Projects Located  
Within Marion and Polk Counties**

The Cherriots Call Center provides coordination of transportation services inside the Cherriots service area for RED Line, CARTS, and CherryLift. The Call Center refers customers to other providers and public transportation outside the Cherriots service area.

Chemeketa Area Regional Transportation System (CARTS) provides public transportation service to rural Marion and Polk counties including the following communities: Salem, Woodburn, Gervais, Brooks, Mt. Angel, Silverton, Gates, Mill City, Lyons, Mehama, Stayton, Sublimity, Aumsville, Turner, Dallas, Monmouth, Independence, Dallas, and Rickreall. CARTS operates deviated fixed routes that travel to Salem and three regional dial-a-ride routes that remind in the region they serve.

**Cherrylift**

This service coordinates with Cherriots and CARTS. There are customers who are able to use Cherriots for some of their trips or portions of trip (classified as conditional eligibility) and then transfer to CherryLift. During incremental weather some customers may only be able to access CherryLift. Customers who qualify can ride CARTS from outside the area, then transfer to CherryLift while within the UBG.

**d.) Is your project cost- effective?**

*Describe average cost per ride, cost per mile and cost per hour, limit 200 words*

Cost per ride: CherryLift \$30.91, RED Line \$33.76, CARTS \$13.21

Cost per mile: CherryLift \$5.93, RED Line \$6.51, CARTS \$4.13

Cost per hour: CherryLift \$73.59, RED Line \$65.14, CARTS \$76.52

**e.) Project Quality**

*Describe the **need** for this project. How was this need determined or assessed? Max 2,500 characters/approx. 400 words*

**2017-2019 Special Transportation Fund (STF) Grant Application for Projects Located  
Within Marion and Polk Counties**

CARTS services including deviated fixed route, flex route and dial-a-ride it provides a viable option for all demographic groups to connect with other communities and essential services. Other groups strongly served by CARTS are people traveling for school and work. The connections to the neighboring cities such as Salem and Woodburn afford rural community members opportunities to maintain employment and the ability to connect with necessary life enhancing services.

CherryLift provides public transit services to individuals who are unable to use the Cherriots fixed route system due to a disabling condition. An application process to determine eligibility is required. CherryLift connects customers with shopping, work and other activities. Cherriots collaborates with Marion County to provide CherryLift service for rehabilitation and work program for developmentally disabled individuals within the community.

RED Line provides public transportation for individuals with disabilities and senior citizens who may or may not be eligible for ADA paratransit and/or may or may not be able to access fixed route services. Many riders appreciate direct rides to services and shopping as opposed to accessing traditional fixed route services. The customer base often comments how RED Line gives them freedom to move within the community.

**f.) Expected Outcomes**

*Describe the expected outcomes of this project on seniors and people with disabilities. Why is this project the best method to address the previously described need? Max 2,500 characters/approx. 400 words*

**2017-2019 Special Transportation Fund (STF) Grant Application for Projects Located  
Within Marion and Polk Counties**

**CARTS**

An expected outcome of the CARTS service is to provide access and mobility to seniors and individuals with disabilities that live and/or work outside of the Salem-Keizer Urban Growth Boundary. CARTS fills an unmet need for transportation services for seniors and individuals with disabilities in surrounding areas of Salem-Keizer. CARTS rural transportation is essential in connecting communities and people to work, school, shopping, medical appointments and other essential services

**CherryLift**

An expected outcome of the CherryLift service is to provide access and mobility to seniors and individuals with disabilities that qualify for ADA paratransit services by completing a three step application process based on the individuals current functional ability to access fixed routes that may not otherwise have transportation options preventing them from accessing their community. CherryLift connects customers with shopping, work and other activities. Cherriots collaborates with Marion County to provide CherryLift service for rehabilitation and work program for developmentally disabled individuals within the community.

**RED Line**

An expected outcome of the RED Line service is to provide mobility for those seniors and individuals with disabilities whom may or may not qualify for CherryLift and who cannot access Cherriots fixed-route buses. RED Line fills an unmet need for transportation for seniors and individuals with disabilities within the Salem-Keizer urbanized area.

**2. Project impact on four goals of transit**

**a.) Describe the project's impact on access.**

*Access includes the ability of seniors and people with disabilities to travel to employment opportunities, community services, education, healthcare, etc., and to safely arrive at and depart their transit stop.*

CARTS, CherryLift, and RED Line transportation services provide transportation options for seniors and individuals with disabilities to access jobs, education, shopping, medical facilities, and recreational opportunities throughout the region.

**b.) Describe the project's impact on availability.**

*Availability includes spatial availability (service close to me), time availability (service when I need it), and the size of the service area.*

**2017-2019 Special Transportation Fund (STF) Grant Application for Projects Located Within Marion and Polk Counties**

CARTS flex/dial-a-ride transportation services are available 8:00 am-5:00 pm Monday through Friday allowing riders access to community services, jobs, education, medical appointments, and shopping. CARTS, as with all Cherriots transit services does not operate on weekends.

CherryLift transportation service is available approximately 6:00 am to 10:30 pm Monday-Friday allowing qualifying riders access to community services, jobs, education, medical appointments, and shopping. CherryLift, as with all Cherriots transit services does not operate on weekends.

RED Line is available 7:00 am to 6:30 pm Monday through Friday and allows customers to access community services, jobs, education, medical appointments, and shopping. RED Line, as with all Cherriots transit services does not operate on weekends.

**c.) Describe the project's impact on connectivity.**

*Connectivity includes the integration of services (routes, schedules, fare structures, information systems, modal transfer facilities).*

Call Center staff is trained to take cues from the caller and then connect them to the appropriate transportation option of which CARTS, RED Line, and CherryLift transportation services are options. The connection to appropriate transportation options reduces duplication of services offered and increases reliability of existing services.

CARTS service coordinates with Cherriots fixed route service in Salem, the 1X service to Wilsonville, 2X service to Grand Ronde, Woodburn Transit, Canby Area Transit, Yamhill and the Silver Trolley in Silverton.

Cherriots collaborates with Marion County to provide CherryLift service for rehabilitation and work program for developmentally disabled individuals within the community.

**d.) Describe this project's impact on economic development.**

*Economic development includes public transportation's contribution to providing connections for workers to employers, reducing congestion, influencing land use choice and land values, and providing employment opportunities.*

**2017-2019 Special Transportation Fund (STF) Grant Application for Projects Located  
Within Marion and Polk Counties**

CARTS, CherryLift, and RED Line transportation services allows citizens to shop, access recreation, jobs, education, medical, and other community services in and around the Salem-Keizer areas. The transportation services promote spending within and around the local community by providing the means for seniors and individuals with disabilities to access these important community resources.

**2017-2019 Special Transportation Fund (STF) Grant Application for Projects Located  
Within Marion and Polk Counties**

**3. Project Budget**

Enter all costs involved in the **total** cost of the project.

Type	Amount
STF Administration	4000
C/L, Carts, Redline operating cost including preventative maintenance and mobility management	\$13,755,000
Match for federal grants over biennium	\$1,166,747
Contingency, operations and capital projects	50,000
Preventive maintenance	\$
Capital equipment	\$
Technology	\$
Other (describe)	\$
Other (describe)	\$
Other (describe)	\$
Other (describe)	\$
<b>Project Total (right click and select "Update Field" to correct total)</b>	\$14,975,747
Amount requested in this grant	\$1,489,898

**2017-2019 Special Transportation Fund (STF) Grant Application for Projects Located  
Within Marion and Polk Counties**

**4. Provide the timeline of the project in the following table**

	<b>Step Description</b>	<b>Completion Date</b>
<b>1</b>	<b>Start service</b>	<b>July 1,2017</b>
<b>2</b>	<b>End Service</b>	<b>June 30, 2019</b>
<b>3</b>		
<b>4</b>		
<b>5</b>		
<b>6</b>		

**5. Is your application for a replacement vehicle?**

- Yes (continue to #6)     No (go on to Section C)

**2017-2019 Special Transportation Fund (STF) Grant Application for Projects Located  
Within Marion and Polk Counties**

**6. Enter the following information about each vehicle to be replaced if the total cost of the vehicle is being requested:**

<b>Vehicle Category*</b>	<b>Qty (#)</b>	<b>Cost Each (\$)</b>	<b>Total (\$)</b>	<b>No. Seats w/ADA Deployed</b>	<b>No. of ADA Stations</b>	<b>Total Capacity</b>	<b>Fuel Type*</b>	<b>Estimated Order Date</b>	<b>Estimated Delivery Date*</b>
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
<b>Totals:</b>	<b>0</b>	<b>Grand Total:</b>	<b>0</b>						

**\*Vehicle Category Descriptions:** <http://www.oregon.gov/ODOT/PT/resources/guidance-library/vehicle-descriptions-usefullife-standards.pdf>

**\*Fuel Type Options:** (G) Gas, (D) Diesel, (B) Biodiesel, (HG) Hybrid-gas, (HD) Hybrid-diesel, (CNG) Compressed Natural Gas, (OF) Other alternative Fuel.

**\*Estimated Delivery Date:** Minimum 160 days if ADA accessible.





**2017-2019 Section 5310(ODOT) Grant Application  
for Projects Located Within Marion and Polk Counties**

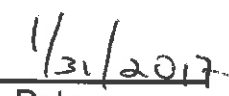
**C. ORGANIZATIONAL CERTIFICATION**

By submitting this document via email to Cherriots, I certify that the submitted materials and data included are complete, true and correct. Also, I certify that my organization is:

- Eligible to enter into agreements with Cherriots;
- Has the legal, managerial and operational capacity to do the work to be paid for by the Section 5310 Program;
- Not debarred or suspended from federal grants;
- In compliance with federal, state and local laws and regulations including, and not limited to, those pertaining to passenger transportation, civil rights, labor, insurance, safety and health, as applicable;
- Complies with the laws or rules of the Section 5310 Program;
- Properly uses and accounts for the Section 5310 Program's goals; and
- Will operate the project or service in a safe, prudent and timely manner.

  
Signature of Authorized Organization Officer

  
Title

  
Date

**2017-2019 Special Transportation  
Fund (STF) Grant Application  
for Projects Located Within Marion and  
Polk Counties**



**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

**INTRODUCTION**

- Read page 4 of the *Special Transportation Fund Instructions* for project and agency eligibility. The instructions are available on the ODOT Rail and Public Transit website: (<http://www.oregon.gov/ODOT/PT/Pages/news.aspx>).
- Use the instructions as a reference while filling out the application form.
- Each project submitted for funding consideration must have its own application.
- Selection criteria are detailed in Section 5 of the *Application Instructions*.
- This form must be filled out using Microsoft Word and submitted as a Word or Adobe .pdf document. Paper applications will NOT be accepted.
- Signature pages should be scanned and attached as separate pages to each application.

**Submittal Checklist**

***Make sure***

- ✓ Application is complete, signed, and dated

***Submit***

- ✓ Proof of agency status (template included in application packet)
- ✓ Ethnic and Racial Impact Statement
- ✓ Maintenance Plan (if submitting an application for preventive maintenance)

**A. ORGANIZATION INFORMATION**

**Name of Organization: City of Silverton**

**Contact Person: Jason Gottgetreu**

**Address: 306 South Water Street, Silverton OR 97381**

**Telephone: 503-874-2212**

**Email: [Jgottgetreu@silverton.or.us](mailto:Jgottgetreu@silverton.or.us)**

**2017-2019 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

**Type of Organization (check one)**

Government Agency	x
Private Not-for-Profit	<input type="checkbox"/>
Other	<input type="checkbox"/>

**Area of service (check one)**

Inside Marion and Polk Counties	x
Outside Marion and Polk Counties	<input type="checkbox"/>
Both inside and outside Marion and Polk Counties	<input type="checkbox"/>

**Organization Days and Hours of Operation**

Day	Hours
Sunday	
Monday	9:00 am to 5 pm
Tuesday	9:00 am to 5 pm
Wednesday	9:00 am to 5 pm
Thursday	9:00 am to 5 pm
Friday	9:00 am to 5 pm
Saturday	9:00 am to 3:30 pm
Please list any planned periods of service closure greater than 3 days (i.e., closed the week between Christmas Day and New Year's Day)	

**Total transportation program costs by year**

FY16 (historical data, if applicable)	FY17 (projected, if applicable)	FY18 (projected)	FY19 (projected)
130,650	\$130,647	\$130,648	\$130,648

**B. PROJECT INFORMATION**

**Project Title** *(will be used for reviewer reference and in public comment process. Example: Mobility Management for The Confederated Tribes of Grand Ronde)*

Silver Trolley, 5311 Match
----------------------------

**Project service area to be served** *(indicate the geographic features that define your service area such as streets, rivers, or jurisdictional boundaries)*

North boundary	Hobart Road
West boundary	Westfield Street
South boundary	Pioneer Drive
East boundary	Monitor Road
Other general geographic area (i.e., within the City of Woodburn)	Within the Urban Growth Boundary of Silverton

*Optional: please provide a map of your service area as a separate single page 8.5"x11" attachment.*

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**Total STF funds requested**

\$40,000

**Start date**

July 1, 2017

**Funding request type (check one)**

Continuation of existing service at same level of service	x
Expansion of existing service	<input type="checkbox"/>
New service	<input type="checkbox"/>
Capital request	<input type="checkbox"/>
Other	<input type="checkbox"/>

**Total Grant fund needs by year**

	FY17	FY18	FY19
STF project	\$16,500	\$20,000	\$20,000

**Scalable STF Grant Request by Year**

*You are strongly encouraged to request the full amount of funding that is needed for each project, including funding for new projects; however, funding is limited. Describe the scalability of your STF funding request, how you scaled down your request and what aspects of the program would not be funded under this funding scenario below. Then enter your scaled down request amounts.*

*Scalability Description: The request for STF funds is to be utilized as match for the City's 5311 Operations match. In the past the City has received \$16,500 per year for the STF and has been able to operate the Trolley. The cost of operations and maintenance has increased due to maintenance costs and staff costs rising.*

	FY17	FY18	FY19	Total
Scaled request:	\$16,500	\$16,500	\$16,500	\$33,000

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Identify the project's additional sources of funding in the table below:

<b>Estimated Additional Project Resources</b>	
<b>Source of Funds</b>	<b>Dollar Amount</b>
2017-2019 STF Program Request ( <i>Important!</i> )	\$40,000
Local Resources	\$69,500
Federal Resources	\$140,295
Other (provide description): 5310	\$11,500
<b>Project Grand Total</b>	<b>\$261,295</b>

The award of this STF Grant will enable federal funds to be brought to the project.

**Coordinated Plan**

Is project derived from the *Cherriots Coordinated Public Transit – Human Services Transportation Plan* dated August, 2016?  Yes  No If yes, what page(s)? p.42

If no, explain why the project is not part of the Coordinated Plan.

*For example: Is the project part of another plan (please name)? Is the plan still being finalized?*

**1. Project Description**

**a.) Describe services or capital investment to be provided by STF funding.** Include a description of the following:

- Who you will serve? The Silver Trolley is operated by the City of Silverton's Community Development Department and provides demand responsive (dial-a-ride) curb-to-curb service for the senior, disabled, special needs, youth, economically disadvantaged, and the general public.
- What geographic area you will serve? The Silver Trolley operates in the City of Silverton's city limits and associated urban growth boundary with a few exceptions on a case by case basis.
- What level of service will be provided to customers? The Silver Trolley provides free curb-to-curb service; drivers wait for an individual at the curb of a public street, in front or close to the rider's house, building, or other designated pick-up location as possible. For passenger drop offs, the driver drops the rider off at the sidewalk, or another safe waiting area next to the curb of a public street, in front or as close to the designated drop off location as possible.
- Operational activities; how will customers request and receive rides, including scheduling and dispatching? Dispatch is available for ride scheduling Monday through Friday from 8:00 AM to 5:00 PM (Dispatchers will not be available to answer phones on Saturdays so all trips need to be made by Friday). There is 24 hour voicemail service available for after hour calls or if the line is busy. Dispatchers shall route and schedule each trip request at the time the reservation is made. Ride confirmation and "ready times" will be given to the rider. When at capacity, alternative times and/or days can be arranged, or the trip may be denied. Riders should expect the Trolley vehicle

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within 30 minutes of the arranged time (15 minutes before and 15 minutes after the scheduled time).

- Describe if volunteers will be utilized to provide service and how this will occur (will the volunteer program be supported with 5310(ODOT) or other funds? Will you provide mileage reimbursement to volunteers using their own vehicles?). Volunteers are not utilized.
  - How will the service be marketed? Silver Trolley brochures (available in English and Spanish) to educate citizens about the Silver Trolley services.
- ?

**b.) Will your project activities preserve existing service and/or provide new service?**

*Describe how the project preserves existing service or provides new or expanded service, limit 200 words*

The City of Silverton utilizes STF as match for the City's 5311 Operations grant. The Operations grant is utilized for personnel, operations, and some materials and services. These are necessary elements in operating a transit system.

**c.) Will you coordinate between providers to avoid duplication? Describe what level of coordination between partners is done and how duplication is avoided, limit 200 words**

Riders of the Silver Trolley can coordinate their ride with CARTS (Chemeketa Area Regional Transportation System) to connect Silverton to the communities of Salem, Woodburn, Mt. Angel, Hubbard, Gervais, and other neighboring communities in between.

**d.) Is your project cost- effective?**

*Describe average cost per ride, cost per mile and cost per hour, limit 200 words*

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The Silver Trolley is a demand response system. The average cost per ride is \$13.75 with the average cost per mile being \$7.50, and the average cost per hour being \$49.40.

**e.) Project Quality**

*Describe the **need** for this project. How was this need determined or assessed? Max 2,500 characters/approx. 400 words*

The project is to continue the operations of the Silver Trolley. The Silver Trolley is a free demand response service providing rides within the Urban Growth Boundary of the City of Silverton. About 75% of the rides the Silver Trolley provides are to the elderly or people with disabilities.

**f.) Expected Outcomes**

*Describe the expected outcomes of this project on seniors and people with disabilities. Why is this project the best method to address the previously described need? Max 2,500 characters/approx. 400 words*

The project is expected to continue to serve the community of Silverton with a convenient demand response transportation service at no charge for seniors, people with disabilities, and the general public.



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**2. Project impact on four goals of transit**

**a.) Describe the project's impact on access.**

*Access includes the ability of seniors and people with disabilities to travel to employment opportunities, community services, education, healthcare, etc., and to safely arrive at and depart their transit stop.*

The Silver Trolley is a free demand response service that provides access to the community that allows seniors and people with disabilities the ability to travel to employment, community services, education, healthcare, etc., and to safely arrive at and depart their transit stop. All Silver Trolley vehicles are ADA accessible.

**b.) Describe the project's impact on availability.**

*Availability includes spatial availability (service close to me), time availability (service when I need it), and the size of the service area.*

Continuing operating the Silver Trolley at the current service levels provides free curb to curb service to all residents within the Urban Growth Boundary to any location within the Urban Growth Boundary 6 days a week.

**c.) Describe the project's impact on connectivity.**

*Connectivity includes the integration of services (routes, schedules, fare structures, information systems, modal transfer facilities).*

The Trolley does not have routes nor does it require a fare. Having funds to operate the Trolley ensures full schedule coverage.

**d.) Describe this project's impact on economic development.**

*Economic development includes public transportation's contribution to providing connections for workers to employers, reducing congestion, influencing land use choice and land values, and providing employment opportunities.*

Having an operational transit service allows employees to utilize the service to travel to work and also allows residents with limited mobility access to local businesses to utilize the services provided.

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**3. Project Budget**

Enter all costs involved in the **total** cost of the project.

Type	Amount
Labor (payroll)	\$219,795
Contracted services	\$
Materials and supplies	\$30,000
Operations	\$
Preventive maintenance	\$11,500
Capital equipment	\$
Technology	\$
Other (conversion price)	\$
Other (additional equipment)	\$
Other (shipping)	\$
Other (fees)	\$
<b>Project Total (right click and select "Update Field" to correct total)</b>	<b>\$261,295</b>
Amount requested in this grant	\$40,000

**4. Provide the timeline of the project in the following table**

	Step Description	Completion Date
1		
2		
3		
4		
5		
6		

**5. Is your application for a replacement vehicle?**

Yes (continue to #6)     No (go on to Section C)

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**6. Enter the following information about each vehicle to be replaced if the total cost of the vehicle is being requested:**

<b>Vehicle Category*</b>	<b>Qty (#)</b>	<b>Cost Each (\$)</b>	<b>Total (\$)</b>	<b>No. Seats w/ADA Deployed</b>	<b>No. of ADA Stations</b>	<b>Total Capacity</b>	<b>Fuel Type*</b>	<b>Estimated Order Date</b>	<b>Estimated Delivery Date*</b>
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
<b>Totals:</b>		<b>Grand Total:</b>	<b>0</b>						

**\*Vehicle Category Descriptions:** <http://www.oregon.gov/ODOT/PT/resources/guidance-library/vehicle-descriptions-usefullife-standards.pdf>

**\*Fuel Type Options:** (G) Gas, (D) Diesel, (B) Biodiesel, (HG) Hybrid-gas, (HD) Hybrid-diesel, (CNG) Compressed Natural Gas, (OF) Other alternative Fuel.


**\*Estimated Delivery Date:** Minimum 160 days if ADA accessible.

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**C. ORGANIZATIONAL CERTIFICATION**

By submitting this document via email to Cherriots, I certify that the submitted materials and data included are complete, true and correct. Also, I certify that my organization is:

- Eligible to enter into agreements with Cherriots;
- Has the legal, managerial and operational capacity to do the work to be paid for by the STF;
- Not debarred or suspended from federal grants;
- In compliance with federal, state and local laws and regulations including, and not limited to, those pertaining to passenger transportation, civil rights, labor, insurance, safety and health, as applicable;
- Complies with the laws or rules of the STF Program;
- Properly uses and accounts for the STF; and
- Will operate the project or service in a safe, prudent and timely manner.

	<i>Community Development Director</i>	<i>1-27-2017</i>
Signature of Authorized Organization Officer	Title	Date

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**Private Nonprofit Agency – Corporation Status Inquiry and Certification**

If your agency or organization is claiming eligibility as a Section 5310 or STF Program applicant based on its status as a private nonprofit organization, you must obtain verification of its incorporation number and current legal standing from the Oregon Secretary of State Information Retrieval/ Certification & Records Unit (IRC Unit). The “Status Inquiry” document must be attached as an appendix to the application. To assist your agency or organization in obtaining this information, use one of these two methods:

To obtain Corporate Records Information over the Internet, go to:  
<http://sos.oregon.gov/business/Pages/find.aspx> Enter the name of your agency or organization. If its status is active, print the page and submit it as proof.

**Private Non-profits**

Legal Name of Non-profit Applicant:

State of Oregon Articles of Incorporation Number:

Date of Incorporation:

**Certifying Representative**

Name (print):	
Title (print):	
Signature:	Date:

**2017-2019 STF Grant Application  
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**RACIAL AND ETHNIC IMPACT STATEMENT**

**This form is used for informational purposes only and must be included with the grant application.**

Chapter 600 of the 2013 Oregon Laws require applicants to include with each grant application a racial and ethnic impact statement. The statement provides information as to the disproportionate or unique impact the proposed policies or programs may have on minority persons in the State of Oregon if the grant is awarded to a corporation or other legal entity other than natural persons.

1. The proposed grant project policies or programs could have a disproportionate or unique positive impact on the following minority persons:

Indicate all that apply:

- Women
- Persons with Disabilities
- African-Americans
- Hispanics
- Asians or Pacific Islanders
- American Indians
- Alaskan Natives

2. The proposed grant project policies or programs could have a disproportionate or unique negative impact on the following minority persons:

Indicate all that apply:

- Women
- Persons with Disabilities
- African-Americans
- Hispanics
- Asians or Pacific Islanders
- American Indians
- Alaskan Natives

3.  The proposed grant project policies or programs will have no disproportionate or unique impact on minority persons.

If you checked numbers 1 or 2 above, on a separate sheet of paper, provide the rationale for the existence of policies or programs having a disproportionate or unique impact on minority persons in this state. Further provide evidence of consultation with representative(s) of the affected minority persons.

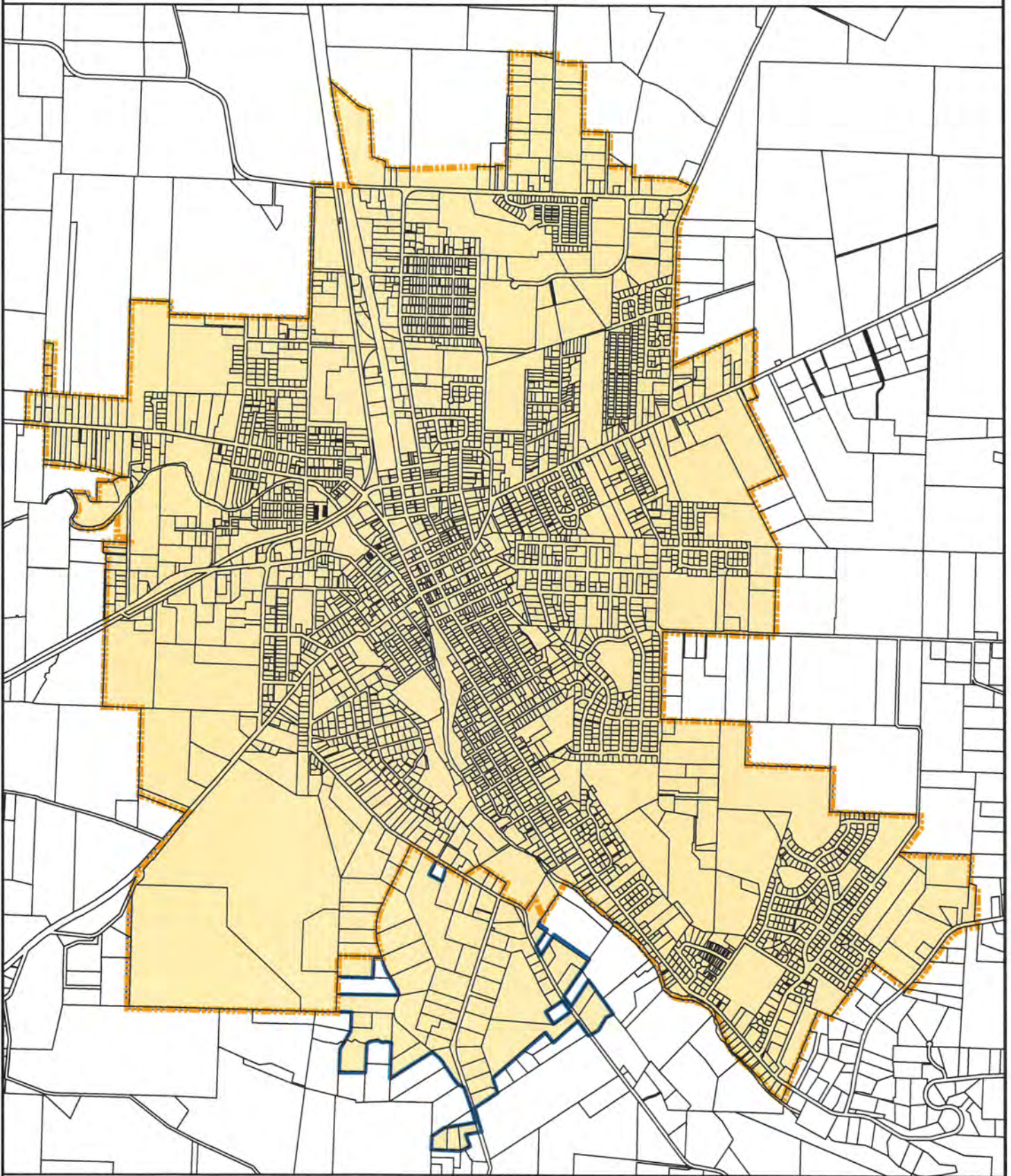
I HEREBY CERTIFY on this 27 day of January, 2017, the information contained on this form and any attachment is complete and accurate to the best of my knowledge.

Signature: Jason Gottgretsen

Printed Name: Jason Gottgretsen  
Title: Community Development Director

1 "Minority persons" are defined in SB 463 (2013 Regular Session) as women, persons with disabilities (as defined in ORS 174.107), African-Americans, Hispanics, Asians or Pacific islanders, American Indians, and Alaskan Natives.

# City of Silverton - Silver Trolley Service Area



## Legend



Silverton Urban Growth Boundary - Area of Service

[301]



Disclaimer:  
This map was published by the City of Silverton Community Development Department as a general planning tool. Due to the differing quality of source data, the Department cannot accept responsibility for errors or omissions, and therefore, there are no warranties which accompany this material.

## **PULLED FROM AGENDA**

**MEMO TO: BOARD OF DIRECTORS**

**FROM: DAVID TRIMBLE, CHIEF OPERATING OFFICER**

**THRU: ALLAN POLLOCK, GENERAL MANAGER**

**SUBJECT: CNG TANK ACQUISITION**

### **Issue**

Shall the Board authorize the General Manager to execute a contract modification with McNeilus Truck and Manufacturing to purchase an additional 84 CNG tanks and tank valves for twelve (12) buses at a total cost of \$242,540?

### **Background and Findings**

On December 10, 2015, the Cheriots Board of Directors authorized the General Manager to enter into a contract with McNeilus Truck and Manufacturing, for the purchase of 84 CNG tanks and valves for the purpose of replacing existing CNG tanks in 12 buses. The total cost was \$242,508. (See Attachment A)

Cheriots staff is currently in the processes of re-issuing a Request for Proposal (RFP) for the purchase of replacement fixed-route vehicles. The initial procurement process was delayed due, in part, to the prolonged process for the procurement of a *Buy America* vendor. *Buy America* certifications are a requirement of the Federal Transit Administration (FTA), for agencies purchasing vehicles with Federal funds. Moreover, there were changes to staff in the Procurement/Contracts Department, which further delayed the process. For those reasons, staff was not able to execute a contract for the purchase of replacement vehicles, prior to the pending expiration of the current CNG tanks.

Twelve vehicles are nearing completion of the tank installation process—leaving 12 additional vehicles with tanks set to expire in May and June, 2017. The proposed contract modification is necessary for continued continuity of revenue service until such time as those vehicles can be fully replaced, which is estimated for late summer 2018.

### **Financial Impact**

The additional cost will be paid for through Federal 5307 funds already in the budget for FY2017. The proposed contract modification allows for continued fixed-route services as currently budgeted in SAMTD's FY2017 Adopted Budget and will allow for continued service in the upcoming FY2018 Proposed Budget.



In response to the requested contract modification, McNeilus Truck and Manufacturing agreed to hold the current contract component prices from the original contract for the additional 84 CNG Tanks.

If this contract modification is not approved, those 12 identified buses will need to be removed from service as a safety precaution once their useful life expiration has been reached.

**Recommendation**

Staff recommends the Board authorize the General Manager to execute a contract modification (amendment) with McNeilus Truck and Manufacturing to purchase 84 CNG tanks and tank valves for a total cost of \$242,540.

**Proposed Motion**

**I move the Board authorize the General Manager to execute a contract modification with McNeilus Truck and Manufacturing to purchase 84 CNG tanks and tank valves for a total cost of \$242,540.**

**MEMO TO: BOARD OF DIRECTORS**  
**FROM: GREGG THOMPSON, MAINTENANCE MANAGER**  
**THRU: ALLAN POLLOCK, GENERAL MANAGER**  
**SUBJECT: CNG TANK AQUISION**

**Issue**

Shall the Board authorize the General Manager to enter into a contract with McNeilus Truck and Manufacturing to purchase 84 CNG tanks and tank valves for a total cost of \$242,508?

**Background and Findings**

Salem-Keizer Transit currently operates a fixed route fleet of 64 35' and 40' fixed route buses. The current fleet consists of 34 Compressed Natural Gas (CNG) powered vehicles manufactured by Orion. Of those 34 buses, 24 were purchased in 2002, 2 were purchased in 2004 with an additional 8 purchased in 2005. Each bus contains 7 high pressure tanks capable of containing 4500 PSI. Tanks manufactured at this time are limited to a 15 year life span before they are rendered unusable.

Each CNG tank is a composite of aluminum wrapped in carbon fiber. The lifecycle of a CNG tank is determined at time of manufacture through testing and then stamped with an expiration date. CNG tank useful life is regulated by Federal Regulation FMVSS 304 (49 CFR 571.304). Federal Motor Vehicle Safety Standards and Regulations

Staff had contacted several CNG tank manufacturers in hopes of finding a viable alternative to tank replacement such as having tanks re-certified. The recertification process would entail testing each tank to the point of failure; essentially rendering the tested tank unusable. According to CNG tank manufacturers it is not possible to have existing tanks re-certified; the only option is replacement.

An update was presented at the April 2014 work session outlining the importance of replacing CNG tanks as well as the impact of not doing so would have on the fleet. An estimated cost was also presented at that time. (Table A)

SAMTD was awarded an STP 5307 Grant in August of 2015 for the replacement of CNG tanks for a total project amount of \$258,553 including a local match of \$26,553. The match will come from the general fund that has been allocated for capital project match.

An RFQ for CNG Bus Replacement Cylinders was issued on August 5<sup>th</sup> 2015 and closed October 7<sup>th</sup> 2015. Two proposals were received and scored by an internal committee. McNeilus Truck and Manufacturing was selected as the vendor of choice because of their ability to provide the specified tanks for the lowest overall cost.

The actual costs based upon the submittal from McNeilus Truck and Manufacturing are outlined below. The tanks will be replaced using SAMTD employees and will be charged to the grant. (Table B).

Table A outlines the April 2014 proposed cost of replacing CNG tanks, valves and straps on 12 buses.

	Anticipated budget	\$255,000
Part	Cost Each	Total
84 CNG Tanks	\$2,575.00	\$216,500.00
84 Pressure tank valves	\$280.00	\$23,500.00
Replacement Labor	\$1,250.00 (per bus)	\$15,000.00
	<b>Grand Total</b>	\$255,000.00

Table B outlines the actual cost of replacing CNG tanks, valves and straps on 12 buses.

	Actual Budget	\$258,553
Part	Cost Each	Total
84 CNG Tanks	\$2,587.00	\$217,308
84 Pressure tank valves	\$300.00	\$25,200
Replacement Labor	\$1,250.00 (per bus)	\$15,000.00
	<b>Grand Total</b>	\$257,508

**Recommendation**

Staff recommends that the Board authorize the General Manager to enter into a contract with McNeilus Truck and Manufacturing to purchase 84 CNG tanks and tank valves for a total cost of \$242,508.

**Proposed Motion**

I move that the Board authorize the General Manager to enter into a contract with McNeilus Truck and Manufacturing to purchase 84 CNG tanks and tank valves for a total cost of \$242,508.

**MEMO TO: BOARD OF DIRECTORS**

**FROM: MATT BERGGREN, TRANSIT PLANNER II  
CHRIS FRENCH, SENIOR PLANNER**

**THRU: ALLAN POLLOCK, GENERAL MANAGER**

**SUBJECT: PERFORMANCE REPORT – FY17 Q2**

**Issue**

Shall the Board receive the FY2017 second quarter performance report?

**Background and Findings**

Performance measures for the second quarter of Fiscal Year 2017 (F17 Q2) are included in **Attachment A**. The FY2017 second quarter began October 1, 2016 and ended December 31, 2016. All data are compared to the previous fiscal year. The data for these measures are derived from adjusted Trapeze schedules, vehicle fareboxes, passenger counting systems, and reservation software (RouteMatch and Mobility DR).

Please note there were an unusual number of winter weather events in December, which likely had a negative effect on ridership.

**Revenue Hours**

The following is a summary of the changes in average daily revenue hours by service.

- ❖ Cherriots – Up 6.5% (40.6 Revenue Hours / Day)
  - *Explanation:* The increase in revenue hours is a result of Route 1 fixes, additional trips on Route 1X, and the introduction of Route 15X Airport Road Park & Ride Express, the latter of which is paid for by the State of Oregon.
- ❖ CARTS – Up 1.2% (0.9 Revenue Hours / Day)
  - *Explanation:* None
- ❖ RED Line – Up 16.8% (2.5 Revenue Hours / Day)
  - *Explanation:* As boardings have increased on the dial-a-ride portion of RED Line, the amount of time RED Line buses have spent on the road has increased.
- ❖ CherryLift – Down 2.5% (6.1 Revenue Hours / Day)
  - *Explanation:* As boardings have dropped, a likely result of the mobility assessment program, the amount of time CherryLift buses have spent on the road has dropped.

### **Revenue Miles**

The following is a summary of the changes in average daily revenue miles by service.

- ❖ Cherriots – Up 3.9% (338.6 Revenue Miles / Day)
  - *Explanation:* The increase in revenue miles for Cherriots results from the combination of the additional trip on Route 1X, and the introduction of Route 15X Airport Rd Park & Ride Express, the latter of which is paid for by the State of Oregon.
- ❖ CARTS – Down 4.7% (58.5 Revenue Miles / Day)
  - *Explanation:* This is a result of decreased ridership, in particular on the zone routes, CARTS 25 and 45.
- ❖ RED Line – Up 13.3% (21.9 Revenue Miles / Day)
  - *Explanation:* As boardings have increased on the dial-a-ride portion of RED Line, the number of miles RED Line buses have traveled has increased.
- ❖ CherryLift – Down 8.8% (276.9 Revenue Miles / Day)
  - *Explanation:* As boardings have dropped, a likely result of the mobility assessment program, the number of miles CherryLift buses have driven has dropped.

### **Boardings (Unlinked Trips)**

The following is a summary of the changes in average daily boardings by service.

- ❖ Cherriots – Down 3.0% (340 Boardings / Day)
  - *Explanation:* Ridership has continued to drop, as it has since April 2015. This is likely the results of the combination of low gas prices, the September 2015 route changes, and reliability issues on some of our busiest routes.
- ❖ CARTS – Down 10.6% (44 Boardings / Day)
  - *Explanation:* Some of this drop is likely a result of lower gas prices. Additionally, it is likely some of the schedules changes made in September 2016 to help get the buses running on time might have disrupted some riders' trips.
- ❖ RED Line – Up 7.2% (2 Boardings / Day)
  - *Explanation:* This increase is the equivalent of just over two more boardings a day, or one round trip per day.
- ❖ CherryLift – Down 8.7% (51.3 Boardings / Day)
  - *Explanation:* This drop is a likely result of the mobility assessment program. Many CherryLift riders have been reclassified as being conditionally eligible, meaning for some trips they are able to use CherryLift and for others they are expected to take Cherriots.

***State Bus Pass Program***

Usage of the State Bus Pass Program as a percent of overall Cherriot's ridership has increased from 2.3% in FY17 Q1 to 2.7% in FY17 Q2. Since the launch of the program, 40,894 rides have been taken by State employees using their passes. On average, this is 276.3 rides per day.

***January 2017 Changes***

Staff made a number of changes on January 3, 2017, to increase reliability and to simplify the route numbering and structure. Upcoming performance reports will begin to shed light on the impact these improvements have on overall ridership, starting with the FY17 Q3 (January-March, 2017) Performance Report, which will be presented to the Board on May 25, 2017.

**Financial Impact**

None

**Recommendation**

Receive and file

**Proposed Motion**

None

**ATTACHMENT A**

# FY17 Q2 Performance Measures

## October-December 2016

**Table 1.** Total Revenue Hours

**Table 2.** Average Revenue Hours / Day

**Table 3.** Total Revenue Miles

**Table 4.** Average Revenue Miles / Day

**Table 5.** Total Boardings

**Table 6.** Average Boardings / Day

**Table 7.** Average Boardings / Revenue Hour

**Table 8.** Total Boardings Using State Bus Pass Program

**Table 9.** Average Boardings / Day Using State Bus Pass Program

**Table 10.** State Bus Pass Program Share of Boardings and Customer Comments

**Table 11.** Route 15X

**Table 1. Total Revenue Hours**

Route	Type	FY16 Q2				FY17 Q2			
		Oct 2015	Nov 2015	Dec 2015	Total	Oct 2016	Nov 2016	Dec 2016	Total
(Service Days)		22	19	22	63	21	20	21	62
<b>CHERRIOTS LOCAL FIXED-ROUTE</b>									
1 - N River Rd / S Commercial	F	2,163	2,015	2,332	6,510	2,209	2,103	2,209	6,521
2 - Market / Brown	F	1,192	1,029	1,186	3,407	1,136	1,081	1,136	3,353
3 - Portland Road	S	664	576	665	1,905	630	600	630	1,860
4/4A State / Lancaster	S	673	581	673	1,927	642	611	642	1,895
4 - State / Lancaster	S	337	291	337	965	321	306	321	948
4A - State / Lancaster	S	336	290	336	962	321	305	321	947
5/5A - Edgewater / Center	F	2,026	1,750	2,026	5,802	1,972	1,877	1,972	5,821
5 - Edgewater / Center	F	1,038	897	1,038	2,973	1,005	956	1,005	2,966
5A - Edgewater / Center	F	988	853	988	2,829	967	921	967	2,855
6 - Wallace / Fairview Industrial	B	717	619	717	2,053	676	639	671	1,986
7 - Mission / State	B	344	296	343	983	328	312	328	968
8/8A - 12th / Liberty	S	1,013	876	1,012	2,901	961	916	960	2,837
8 - 12th / Liberty	S	509	440	508	1,457	483	460	482	1,425
8A - 12th / Liberty	S	504	436	504	1,444	478	456	478	1,412
9/9A - Cherry / Parkmeadow	S	676	584	678	1,938	644	614	644	1,902
9 - Cherry / Parkmeadow	S	338	292	338	968	322	307	322	951
9A - Cherry / Parkmeadow	S	338	292	340	970	322	307	322	951
10 - Lansing / Hawthorne	B	330	285	332	947	313	298	313	924
11 - Lancaster / Keizer	F	1,941	1,676	1,937	5,554	1,892	1,802	1,892	5,586
12 - Haysville Drive	B	339	293	339	971	323	307	323	953
13 - Silverton Road	S	663	575	662	1,900	642	611	642	1,895
14 - Windsor Island	S	338	290	336	964	323	307	323	953
15X - Airport Rd Park & Ride Express	X	N/A	N/A	N/A	N/A	423	403	423	1,249
<b>Total</b>		<b>13,079</b>	<b>11,445</b>	<b>13,238</b>	<b>37,762</b>	<b>13,114</b>	<b>12,481</b>	<b>13,108</b>	<b>38,703</b>
<b>CHERRIOTS EXPRESS ROUTES</b>									
1X - Willsonville / Salem Express	X	187	161	187	535	207	197	207	611
2X - Grand Ronde / Salem Express	X	334	289	334	957	319	304	319	942
<b>Total</b>		<b>521</b>	<b>450</b>	<b>521</b>	<b>1,492</b>	<b>526</b>	<b>501</b>	<b>526</b>	<b>1,553</b>
<b>CHERRIOTS ON-DEMAND</b>									
West Salem Connector	DR	330	285	330	945	315	300	285	900
<b>CHERRIOTS QUALIFIED HUMAN SERVICE ORGANIZATION ROUTES</b>									
91 - Garten Foundation	T	10	9	11	30	9	9	9	27
92 - Rockwest	T	15	13	15	43	11	11	11	33
<b>Total</b>		<b>25</b>	<b>22</b>	<b>26</b>	<b>73</b>	<b>20</b>	<b>20</b>	<b>20</b>	<b>60</b>
<i>Cherriots Total</i>		<b>13,955</b>	<b>12,202</b>	<b>14,115</b>	<b>39,327</b>	<b>13,975</b>	<b>13,302</b>	<b>13,939</b>	<b>41,216</b>
<b>CARTS DEVIATED-FIXED ROUTE</b>									
10 - Woodburn / Salem	DFR	187	161	186	534	182	173	182	537
20 - Silverton / Salem	DFR	191	163	191	545	172	173	185	530
30 - Canyon Connector / Salem	DFR	196	171	198	565	204	197	211	612
40 - Polk County / Salem	DFR	200	174	202	576	202	197	209	608
50 - Dallas / Salem Express	DFR	160	138	159	457	154	142	158	454
<b>Total</b>		<b>934</b>	<b>807</b>	<b>936</b>	<b>2,677</b>	<b>914</b>	<b>882</b>	<b>945</b>	<b>2,741</b>
<b>CARTS ZONE ROUTE</b>									
25 - North Marion Flex	ZR	163	140	158	461	153	141	155	449
45 - Polk Flex	ZR	330	284	331	945	314	298	301	913
<b>Total</b>		<b>493</b>	<b>424</b>	<b>489</b>	<b>1,406</b>	<b>467</b>	<b>439</b>	<b>456</b>	<b>1,362</b>
<b>CARTS DIAL-A-RIDE</b>									
35 - Canyon Flex	DAR	130	96	82	308	97	95	80	272
<b>CARTS Total</b>		<b>1,557</b>	<b>1,327</b>	<b>1,507</b>	<b>4,391</b>	<b>1,478</b>	<b>1,416</b>	<b>1,481</b>	<b>4,375</b>
<b>SHOPPER SHUTTLE &amp; DIAL-A-RIDE</b>									
RED Line Dial-a-Ride	DAR	210	162	118	490	236	237	256	729
RED Line Shopper Shuttle	SS	145	122	189	456	122	123	113	358
<b>Total</b>		<b>355</b>	<b>284</b>	<b>307</b>	<b>946</b>	<b>358</b>	<b>360</b>	<b>369</b>	<b>1,087</b>
<b>PARATRANSIT</b>									
CherryLift	DAR	5,420	4,610	5,230	15,260	5,235	4,826	4,580	14,641

F = Frequent, S = Standard, B = Basic, X = Express, DR = Demand Responsive, T = Tripper, DFR = Deviated-Fixed Route, ZR = Zone Route, DAR = Dial-a-Ride, SS = Shopper Shuttle



**Table 2. Average Revenue Hours / Day**

Route	Type	FY16 Q2				FY17 Q2				Percent Change
		Oct 2015	Nov 2015	Dec 2015	Total	Oct 2016	Nov 2016	Dec 2016	Total	
<b>CHERRIOTS LOCAL FIXED-ROUTE</b>										
1 - N River Rd / S Commercial	F	98.3	106.1	106.0	103.3	105.2	105.2	105.2	105.2	1.8%
2 - Market / Brown	F	54.2	54.2	53.9	54.1	54.1	54.1	54.1	54.1	0.0%
3 - Portland Road	S	30.2	30.3	30.2	30.2	30.0	30.0	30.0	30.0	-0.8%
4/4A State / Lancaster	S	30.6	30.6	30.6	30.6	30.6	30.6	30.6	30.6	-0.1%
4 - State / Lancaster	S	15.3	15.3	15.3	15.3	15.3	15.3	15.3	15.3	-0.2%
4A - State / Lancaster	S	15.3	15.3	15.3	15.3	15.3	15.3	15.3	15.3	0.0%
5/5A - Edgewater / Center	F	92.1	92.1	92.1	92.1	93.9	93.9	93.9	93.9	1.9%
5 - Edgewater / Center	F	47.2	47.2	47.2	47.2	47.9	47.8	47.9	47.8	1.4%
5A - Edgewater / Center	F	44.9	44.9	44.9	44.9	46.0	46.1	46.0	46.0	2.5%
6 - Wallace / Fairview Industrial	B	32.6	32.6	32.6	32.6	32.2	32.0	32.0	32.0	-1.7%
7 - Mission / State	B	15.6	15.6	15.6	15.6	15.6	15.6	15.6	15.6	0.1%
8/8A - 12th / Liberty	S	46.0	46.1	46.0	46.0	45.8	45.8	45.7	45.8	-0.6%
8 - 12th / Liberty	S	23.1	23.2	23.1	23.1	23.0	23.0	23.0	23.0	-0.6%
8A - 12th / Liberty	S	22.9	22.9	22.9	22.9	22.8	22.8	22.8	22.8	-0.6%
9/9A - Cherry / Parkmeadow	S	30.7	30.7	30.8	30.8	30.7	30.7	30.7	30.7	-0.3%
9 - Cherry / Parkmeadow	S	15.4	15.4	15.4	15.4	15.3	15.4	15.3	15.3	-0.2%
9A - Cherry / Parkmeadow	S	15.4	15.4	15.5	15.4	15.3	15.4	15.3	15.3	-0.4%
10 - Lansing / Hawthorne	B	15.0	15.0	15.1	15.0	14.9	14.9	14.9	14.9	-0.9%
11 - Lancaster / Keizer	F	88.2	88.2	88.0	88.2	90.1	90.1	90.1	90.1	2.2%
12 - Haysville Drive	B	15.4	15.4	15.4	15.4	15.4	15.4	15.4	15.4	-0.3%
13 - Silverton Road	S	30.1	30.3	30.1	30.2	30.6	30.6	30.6	30.6	1.3%
14 - Windsor Island	S	15.4	15.3	15.3	15.3	15.4	15.4	15.4	15.4	0.5%
15X - Airport Rd Park & Ride Express	X	N/A	N/A	N/A	N/A	20.1	20.2	20.1	20.1	N/A
<b>Total</b>		<b>594.5</b>	<b>602.4</b>	<b>601.7</b>	<b>599.4</b>	<b>624.5</b>	<b>624.1</b>	<b>624.2</b>	<b>624.2</b>	<b>4.1%</b>
<b>CHERRIOTS EXPRESS ROUTES</b>										
1X - Willsonville / Salem Express	X	8.5	8.5	8.5	8.5	9.9	9.9	9.9	9.9	16.0%
2X - Grand Ronde / Salem Express	X	15.2	15.2	15.2	15.2	15.2	15.2	15.2	15.2	0.0%
<b>Total</b>		<b>23.7</b>	<b>23.7</b>	<b>23.7</b>	<b>23.7</b>	<b>25.0</b>	<b>25.1</b>	<b>25.0</b>	<b>25.0</b>	<b>5.8%</b>
<b>CHERRIOTS ON-DEMAND</b>										
West Salem Connector	DR	15.0	15.0	15.0	15.0	15.0	15.0	13.6	14.5	-3.2%
<b>CHERRIOTS QUALIFIED HUMAN SERVICE ORGANIZATION ROUTES</b>										
91 - Garten Foundation	T	0.5	0.5	0.5	0.5	0.4	0.5	0.4	0.4	-8.5%
92 - Rockwest	T	0.7	0.7	0.7	0.7	0.5	0.6	0.5	0.5	-22.0%
<b>Total</b>		<b>1.1</b>	<b>1.2</b>	<b>1.2</b>	<b>1.2</b>	<b>1.0</b>	<b>1.0</b>	<b>1.0</b>	<b>1.0</b>	<b>-16.5%</b>
<b>Cherriots Total</b>		<b>634.3</b>	<b>642.2</b>	<b>641.6</b>	<b>624.2</b>	<b>665.5</b>	<b>665.1</b>	<b>663.8</b>	<b>664.8</b>	<b>6.5%</b>
<b>CARTS DEVIATED-FIXED ROUTE</b>										
10 - Woodburn / Salem	DFR	8.5	8.5	8.5	8.5	8.7	8.7	8.7	8.7	2.2%
20 - Silverton / Salem	DFR	8.7	8.6	8.7	8.7	8.2	8.7	8.8	8.5	-1.2%
30 - Canyon Connector / Salem	DFR	8.9	9.0	9.0	9.0	9.7	9.9	10.0	9.9	10.1%
40 - Polk County / Salem	DFR	9.1	9.2	9.2	9.1	9.6	9.9	10.0	9.8	7.3%
50 - Dallas / Salem Express	DFR	7.3	7.3	7.2	7.3	7.3	7.1	7.5	7.3	0.9%
<b>Total</b>		<b>42.5</b>	<b>42.5</b>	<b>42.5</b>	<b>42.5</b>	<b>43.5</b>	<b>44.1</b>	<b>45.0</b>	<b>44.2</b>	<b>4.0%</b>
<b>CARTS ZONE ROUTE</b>										
25 - North Marion Flex	ZR	7.4	7.4	7.2	7.3	7.3	7.1	7.4	7.2	-1.0%
45 - Polk Flex	ZR	15.0	14.9	15.0	15.0	15.0	14.9	14.3	14.7	-1.8%
<b>Total</b>		<b>22.4</b>	<b>22.3</b>	<b>22.2</b>	<b>22.3</b>	<b>22.2</b>	<b>22.0</b>	<b>21.7</b>	<b>22.0</b>	<b>-1.6%</b>
<b>CARTS DIAL-A-RIDE</b>										
35 - Canyon Flex	DAR	5.9	5.1	3.7	4.9	4.6	4.8	3.8	4.4	-10.3%
<b>CARTS Total</b>		<b>70.8</b>	<b>69.8</b>	<b>68.5</b>	<b>69.7</b>	<b>70.4</b>	<b>70.8</b>	<b>70.5</b>	<b>70.6</b>	<b>1.2%</b>
<b>SHOPPER SHUTTLE &amp; DIAL-A-RIDE</b>										
RED Line Dial-a-Ride	DAR	9.5	8.5	5.4	7.8	11.2	11.9	12.2	11.8	51.2%
RED Line Shopper Shuttle	SS	6.6	6.4	8.6	7.2	5.8	6.2	5.4	5.8	-20.2%
<b>Total</b>		<b>16.1</b>	<b>14.9</b>	<b>14.0</b>	<b>15.0</b>	<b>17.0</b>	<b>18.0</b>	<b>17.6</b>	<b>17.5</b>	<b>16.8%</b>
<b>PARATRANSIT</b>										
CherryLift	DAR	246.4	242.6	237.7	242.2	249.3	241.3	218.1	236.1	-2.5%

F = Frequent, S = Standard, B = Basic, X = Express, DR = Demand Responsive, T = Tripper, DFR = Deviated-Fixed Route, ZR = Zone Route, DAR = Dial-a-Ride, SS = Shopper Shuttle

**Table 3. Total Revenue Miles**

Route	Type	FY16 Q2				FY17 Q2			
		Oct 2015	Nov 2015	Dec 2015	Total	Oct 2016	Nov 2016	Dec 2016	Total
(Service Days)		22	19	22	63	21	20	21	62
<b>CHERRIOTS LOCAL FIXED-ROUTE</b>									
1 - N River Rd / S Commercial	F	31,289	27,342	31,653	90,284	29,951	28,519	29,951	88,421
2 - Market / Brown	F	15,051	13,001	15,043	43,095	14,370	13,676	14,370	42,416
3 - Portland Road	S	7,968	6,882	7,965	22,815	7,379	7,028	7,379	21,786
4/4A State / Lancaster	S	7,771	6,712	7,765	22,248	6,897	6,569	6,897	20,363
4 - State / Lancaster	S	3,864	3,338	3,858	11,060	3,168	3,017	3,168	9,353
4A - State / Lancaster	S	3,907	3,374	3,907	11,188	3,729	3,552	3,729	11,010
5/5A - Edgewater / Center	F	23,909	20,649	23,910	68,468	23,056	21,943	23,056	68,055
5 - Edgewater / Center	F	12,252	10,582	12,253	35,087	11,877	11,297	11,877	35,051
5A - Edgewater / Center	F	11,657	10,067	11,657	33,381	11,179	10,646	11,179	33,004
6 - Wallace / Fairview Industrial	B	9,974	8,618	9,943	28,535	9,438	9,129	9,585	28,152
7 - Mission / State	B	4,509	3,894	4,509	12,912	4,304	4,099	4,304	12,707
8/8A - 12th / Liberty	S	13,690	11,824	13,683	39,197	13,068	12,443	13,059	38,570
8 - 12th / Liberty	S	6,790	5,865	6,783	19,438	6,482	6,170	6,473	19,125
8A - 12th / Liberty	S	6,900	5,959	6,900	19,759	6,586	6,273	6,586	19,445
9/9A - Cherry / Parkmeadow	S	10,011	8,641	10,002	28,654	9,559	9,104	9,559	28,222
9 - Cherry / Parkmeadow	S	4,999	4,312	4,990	14,301	4,775	4,547	4,775	14,097
9A - Cherry / Parkmeadow	S	5,012	4,329	5,012	14,353	4,784	4,557	4,784	14,125
10 - Lansing / Hawthorne	B	4,245	3,666	4,245	12,156	4,052	3,859	4,052	11,963
11 - Lancaster / Keizer	F	25,938	22,400	25,866	74,204	24,759	23,580	24,759	73,098
12 - Haysville Drive	B	4,089	3,532	4,089	11,710	3,477	3,312	3,477	10,266
13 - Silverton Road	S	8,017	6,957	8,053	23,027	7,384	7,032	7,384	21,800
14 - Windsor Island	S	4,986	4,307	4,986	14,279	4,760	4,533	4,760	14,053
15X - Airport Rd Park & Ride Express	X	N/A	N/A	N/A	N/A	4,368	4,160	4,368	12,896
<b>Total</b>		<b>171,447</b>	<b>148,425</b>	<b>171,712</b>	<b>491,584</b>	<b>166,822</b>	<b>158,986</b>	<b>166,960</b>	<b>492,768</b>
<b>CHERRIOTS EXPRESS ROUTES</b>									
1X - Willsonville / Salem Express	X	5,652	4,881	5,652	16,185	6,718	6,398	6,718	19,834
2X - Grand Ronde / Salem Express	X	11,533	9,960	11,533	33,026	11,009	10,485	11,009	32,503
<b>Total</b>		<b>17,185</b>	<b>14,841</b>	<b>17,185</b>	<b>49,211</b>	<b>17,727</b>	<b>16,883</b>	<b>17,727</b>	<b>52,337</b>
<b>CHERRIOTS ON-DEMAND</b>									
West Salem Connector	DR	3,190	2,937	2,762	8,889	3,084	2,769	2,247	8,100
<b>CHERRIOTS QUALIFIED HUMAN SERVICE ORGANIZATION ROUTES</b>									
91 - Garten Foundation	T	128	111	128	367	122	117	122	361
92 - Rockwest	T	212	183	212	607	202	192	202	596
<b>Total</b>		<b>340</b>	<b>294</b>	<b>340</b>	<b>974</b>	<b>324</b>	<b>309</b>	<b>324</b>	<b>957</b>
<i>Cherriots Total</i>		<i>192,162</i>	<i>166,497</i>	<i>191,999</i>	<i>541,769</i>	<i>187,957</i>	<i>178,947</i>	<i>187,258</i>	<i>554,162</i>
<b>CARTS DEVIATED-FIXED ROUTE</b>									
10 - Woodburn / Salem	DFR	3,707	3,186	3,692	10,585	3,571	3,409	3,506	10,486
20 - Silverton / Salem	DFR	3,746	3,234	3,726	10,706	3,359	3,368	3,581	10,308
30 - Canyon Connector / Salem	DFR	5,576	4,756	5,615	15,947	5,089	5,001	4,968	15,058
40 - Polk County / Salem	DFR	4,500	3,837	4,487	12,824	4,132	4,051	4,299	12,482
50 - Dallas / Salem Express	DFR	3,038	2,636	3,022	8,696	2,907	2,796	2,905	8,608
<b>Total</b>		<b>20,567</b>	<b>17,649</b>	<b>20,542</b>	<b>58,758</b>	<b>19,058</b>	<b>18,625</b>	<b>19,259</b>	<b>56,942</b>
<b>CARTS ZONE ROUTE</b>									
25 - North Marion Flex	ZR	2,197	1,777	1,900	5,874	1,938	1,689	1,830	5,457
45 - Polk Flex	ZR	4,385	3,695	4,326	12,406	2,907	2,796	4,089	9,792
<b>Total</b>		<b>6,582</b>	<b>5,472</b>	<b>6,226</b>	<b>18,280</b>	<b>4,845</b>	<b>4,485</b>	<b>5,919</b>	<b>15,249</b>
<b>CARTS DIAL-A-RIDE</b>									
35 - Canyon Flex	DAR	849	566	337	1,752	599	518	600	1,717
<b>CARTS Total</b>		<b>27,998</b>	<b>23,687</b>	<b>27,105</b>	<b>78,790</b>	<b>24,502</b>	<b>23,628</b>	<b>25,778</b>	<b>73,908</b>
<b>SHOPPER SHUTTLE &amp; DIAL-A-RIDE</b>									
RED Line Dial-a-Ride	DAR	2,449	1,991	2,689	7,129	2,691	2,868	2,985	8,544
RED Line Shopper Shuttle	SS	1,199	880	1,187	3,266	1,046	993	1,006	3,045
<b>Total</b>		<b>3,648</b>	<b>2,871</b>	<b>3,876</b>	<b>10,395</b>	<b>3,737</b>	<b>3,861</b>	<b>3,991</b>	<b>11,589</b>
<b>PARATRANSIT</b>									
CherryLift	DAR	79,408	55,458	62,442	197,308	64,710	58,653	53,646	177,009

F = Frequent, S = Standard, B = Basic, X = Express, DR = Demand Responsive, T = Tripper, DFR = Deviated-Fixed Route, ZR = Zone Route, DAR = Dial-a-Ride, SS = Shopper Shuttle

**Table 4. Average Revenue Miles / Day**

Route	Type	FY16 Q2				FY17 Q2				Percent Change
		Oct 2015	Nov 2015	Dec 2015	Total	Oct 2016	Nov 2016	Dec 2016	Total	
<b>CHERRIOTS LOCAL FIXED-ROUTE</b>										
1 - N River Rd / S Commercial	F	1,422.2	1,439.1	1,438.8	1,433.1	1,426.2	1,426.0	1,426.2	1,426.1	-0.5%
2 - Market / Brown	F	684.1	684.3	683.8	684.0	684.3	683.8	684.3	684.1	0.0%
3 - Portland Road	S	362.2	362.2	362.0	362.1	351.4	351.4	351.4	351.4	-3.0%
4/4A State / Lancaster	S	353.2	353.3	353.0	353.1	328.4	328.5	328.4	328.4	-7.0%
4 - State / Lancaster	S	175.6	175.7	175.4	175.6	150.9	150.9	150.9	150.9	-14.1%
4A - State / Lancaster	S	177.6	177.6	177.6	177.6	177.6	177.6	177.6	177.6	0.0%
5/5A - Edgewater / Center	F	1,086.8	1,086.8	1,086.8	1,086.8	1,097.9	1,097.2	1,097.9	1,097.7	1.0%
5 - Edgewater / Center	F	556.9	556.9	557.0	556.9	565.6	564.9	565.6	565.3	1.5%
5A - Edgewater / Center	F	529.9	529.8	529.9	529.9	532.3	532.3	532.3	532.3	0.5%
6 - Wallace / Fairview Industrial	B	453.4	453.6	452.0	452.9	449.4	456.5	456.4	454.1	0.2%
7 - Mission / State	B	205.0	204.9	205.0	205.0	205.0	205.0	205.0	205.0	0.0%
8/8A - 12th / Liberty	S	622.3	622.3	622.0	622.2	622.3	622.2	621.9	622.1	0.0%
8 - 12th / Liberty	S	308.6	308.7	308.3	308.5	308.7	308.5	308.2	308.5	0.0%
8A - 12th / Liberty	S	313.6	313.6	313.6	313.6	313.6	313.7	313.6	313.6	0.0%
9/9A - Cherry / Parkmeadow	S	455.0	454.8	454.6	454.8	455.2	455.2	455.2	455.2	0.1%
9 - Cherry / Parkmeadow	S	227.2	226.9	226.8	227.0	227.4	227.4	227.4	227.4	0.2%
9A - Cherry / Parkmeadow	S	227.8	227.8	227.8	227.8	227.8	227.9	227.8	227.8	0.0%
10 - Lansing / Hawthorne	B	193.0	192.9	193.0	193.0	193.0	193.0	193.0	193.0	0.0%
11 - Lancaster / Keizer	F	1,179.0	1,178.9	1,175.7	1,177.8	1,179.0	1,179.0	1,179.0	1,179.0	0.1%
12 - Haysville Drive	B	185.9	185.9	185.9	185.9	165.6	165.6	165.6	165.6	-10.9%
13 - Silverton Road	S	364.4	366.2	366.0	365.5	351.6	351.6	351.6	351.6	-3.8%
14 - Windsor Island	S	226.6	226.7	226.6	226.7	226.7	226.7	226.7	226.7	0.0%
15X - Airport Rd Park & Ride Express	X	N/A	N/A	N/A	N/A	208.0	208.0	208.0	208.0	N/A
<b>Total</b>		<b>7,793.0</b>	<b>7,811.8</b>	<b>7,805.1</b>	<b>7,802.9</b>	<b>7,943.9</b>	<b>7,949.3</b>	<b>7,950.5</b>	<b>7,947.9</b>	<b>1.9%</b>
<b>CHERRIOTS EXPRESS ROUTES</b>										
1X - Willsonville / Salem Express	X	256.9	256.9	256.9	256.9	319.9	319.9	319.9	319.9	24.5%
2X - Grand Ronde / Salem Express	X	524.2	524.2	524.2	524.2	524.2	524.3	524.2	524.2	0.0%
<b>Total</b>		<b>781.1</b>	<b>781.1</b>	<b>781.1</b>	<b>781.1</b>	<b>844.1</b>	<b>844.2</b>	<b>844.1</b>	<b>844.1</b>	<b>8.1%</b>
<b>CHERRIOTS ON-DEMAND</b>										
West Salem Connector	DR	145.0	154.6	125.5	141.1	146.9	138.5	107.0	130.6	-7.4%
<b>CHERRIOTS QUALIFIED HUMAN SERVICE ORGANIZATION ROUTES</b>										
91 - Garten Foundation	T	5.8	5.8	5.8	5.8	5.8	5.9	5.8	5.8	0.0%
92 - Rockwest	T	9.6	9.6	9.6	9.6	9.6	9.6	9.6	9.6	-0.2%
<b>Total</b>		<b>15.5</b>	<b>15.5</b>	<b>15.5</b>	<b>15.5</b>	<b>15.4</b>	<b>15.5</b>	<b>15.4</b>	<b>15.4</b>	<b>-0.2%</b>
<b>Cherriots Total</b>		<b>8,734.6</b>	<b>8,763.0</b>	<b>8,727.2</b>	<b>8,599.5</b>	<b>8,950.3</b>	<b>8,947.4</b>	<b>8,917.0</b>	<b>8,938.1</b>	<b>3.9%</b>
<b>CARTS DEVIATED-FIXED ROUTE</b>										
10 - Woodburn / Salem	DFR	168.5	167.7	167.8	168.0	170.0	170.5	167.0	169.1	0.7%
20 - Silverton / Salem	DFR	170.3	170.2	169.4	169.9	160.0	168.4	170.5	166.3	-2.2%
30 - Canyon Connector / Salem	DFR	253.5	250.3	255.2	253.1	242.3	250.1	236.6	242.9	-4.1%
40 - Polk County / Salem	DFR	204.5	201.9	204.0	203.6	196.8	202.6	204.7	201.3	-1.1%
50 - Dallas / Salem Express	DFR	138.1	138.7	137.4	138.0	138.4	139.8	138.3	138.8	0.6%
<b>Total</b>		<b>934.9</b>	<b>928.9</b>	<b>933.7</b>	<b>932.7</b>	<b>907.5</b>	<b>931.3</b>	<b>917.1</b>	<b>918.4</b>	<b>-1.5%</b>
<b>CARTS ZONE ROUTE</b>										
25 - North Marion Flex	ZR	99.9	93.5	86.4	93.2	92.3	84.5	87.1	88.0	-5.6%
45 - Polk Flex	ZR	199.3	194.5	196.6	196.9	138.4	139.8	194.7	157.9	-19.8%
<b>Total</b>		<b>299.2</b>	<b>288.0</b>	<b>283.0</b>	<b>290.2</b>	<b>230.7</b>	<b>224.3</b>	<b>281.9</b>	<b>246.0</b>	<b>-15.2%</b>
<b>CARTS DIAL-A-RIDE</b>										
35 - Canyon Flex	DAR	38.6	29.8	15.3	27.8	28.5	25.9	28.6	27.7	-0.4%
<b>CARTS Total</b>		<b>1,272.6</b>	<b>1,246.7</b>	<b>1,232.0</b>	<b>1,250.6</b>	<b>1,166.8</b>	<b>1,181.4</b>	<b>1,227.5</b>	<b>1,192.1</b>	<b>-4.7%</b>
<b>SHOPPER SHUTTLE &amp; DIAL-A-RIDE</b>										
RED Line Dial-a-Ride	DAR	111.3	104.8	122.2	113.2	128.1	143.4	142.1	137.8	21.8%
RED Line Shopper Shuttle	SS	54.5	46.3	54.0	51.8	49.8	49.7	47.9	49.1	-5.3%
<b>Total</b>		<b>165.8</b>	<b>151.1</b>	<b>176.2</b>	<b>165.0</b>	<b>178.0</b>	<b>193.1</b>	<b>190.0</b>	<b>186.9</b>	<b>13.3%</b>
<b>PARATRANSIT</b>										
CherryLift	DAR	3,609.5	2,918.8	2,838.3	3,131.9	3,081.4	2,932.7	2,554.6	2,855.0	-8.8%

F = Frequent, S = Standard, B = Basic, X = Express, DR = Demand Responsive, T = Tripper, DFR = Deviated-Fixed Route, ZR = Zone Route, DAR = Dial-a-Ride, SS = Shopper Shuttle

**Table 5. Total Boardings**

Route	Type	FY16 Q2				FY17 Q2			
		Oct 2015	Nov 2015	Dec 2015	Total	Oct 2016	Nov 2016	Dec 2016	Total
(Service Days)		22	19	22	63	21	20	21	62
<b>CHERRIOTS LOCAL FIXED-ROUTE</b>									
1 - N River Rd / S Commercial	F	54,248	44,728	48,273	147,249	52,226	50,155	47,312	149,693
2 - Market / Brown	F	27,204	21,920	21,153	70,277	26,838	25,717	20,339	72,894
3 - Portland Road	S	19,371	13,163	13,300	45,834	14,355	13,510	11,714	39,579
4/4A State / Lancaster	S	16,729	13,275	14,257	44,261	12,744	12,140	11,020	35,904
4 - State / Lancaster	S	8,721	7,000	7,252	22,973	6,200	5,512	5,208	16,920
4A - State / Lancaster	S	8,008	6,275	7,005	21,288	6,544	6,628	5,812	18,984
5/5A - Edgewater / Center	F	35,045	29,014	30,862	94,921	32,790	32,504	30,516	95,810
5 - Edgewater / Center	F	17,632	15,553	17,194	50,379	16,518	16,626	15,515	48,659
5A - Edgewater / Center	F	17,413	13,461	13,668	44,542	16,272	15,878	15,001	47,151
6 - Wallace / Fairview Industrial	B	9,463	9,155	9,237	27,855	8,897	7,993	7,643	24,533
7 - Mission / State	B	6,055	5,179	5,364	16,598	6,447	5,753	4,978	17,178
8/8A - 12th / Liberty	S	18,622	14,988	15,323	48,933	15,695	16,114	14,464	46,273
8 - 12th / Liberty	S	9,087	6,198	7,696	22,981	7,789	8,438	7,479	23,706
8A - 12th / Liberty	S	9,535	8,790	7,627	25,952	7,906	7,676	6,985	22,567
9/9A - Cherry / Parkmeadow	S	10,388	8,425	8,272	27,085	8,906	8,249	7,869	25,024
9 - Cherry / Parkmeadow	S	5,483	4,534	4,404	14,421	4,343	4,069	3,962	12,374
9A - Cherry / Parkmeadow	S	4,905	3,891	3,868	12,664	4,563	4,180	3,907	12,650
10 - Lansing / Hawthorne	B	2,886	2,570	2,533	7,989	2,680	2,753	2,106	7,539
11 - Lancaster / Keizer	F	49,635	39,006	39,653	128,294	41,634	39,962	33,192	114,788
12 - Haysville Drive	B	2,872	2,611	2,501	7,984	1,802	1,727	1,314	4,843
13 - Silverton Road	S	11,642	9,504	9,129	30,275	9,945	9,255	7,940	27,140
14 - Windsor Island	S	2,783	2,095	1,859	6,737	1,995	1,938	1,515	5,448
15X - Airport Rd Park & Ride Express	X	0	0	0	0	1,762	1,753	1,727	5,242
<b>Total</b>		<b>266,943</b>	<b>215,633</b>	<b>221,716</b>	<b>704,292</b>	<b>238,716</b>	<b>229,523</b>	<b>203,649</b>	<b>671,888</b>
<b>CHERRIOTS EXPRESS ROUTES</b>									
1X - Willsonville / Salem Express	X	3,228	2,476	2,797	8,501	3,000	2,749	2,419	8,168
2X - Grand Ronde / Salem Express	X	1,812	1,555	1,829	5,196	1,405	1,422	1,436	4,263
<b>Total</b>		<b>5,040</b>	<b>4,031</b>	<b>4,626</b>	<b>13,697</b>	<b>4,405</b>	<b>4,171</b>	<b>3,855</b>	<b>12,431</b>
<b>CHERRIOTS ON-DEMAND</b>									
West Salem Connector	DR	1,309	947	768	3,024	1,107	1,018	730	2,855
<b>CHERRIOTS QUALIFIED HUMAN SERVICE ORGANIZATION ROUTES</b>									
91 - Garten Foundation	T	337	825	723	1,885	308	268	218	794
92 - Rockwest	T	558	396	776	1,730	436	426	264	1,126
<b>Total</b>		<b>895</b>	<b>1,221</b>	<b>1,499</b>	<b>3,615</b>	<b>744</b>	<b>694</b>	<b>482</b>	<b>1,920</b>
<i>Cherriots Total</i>		<i>274,187</i>	<i>221,832</i>	<i>228,609</i>	<i>721,604</i>	<i>244,972</i>	<i>235,406</i>	<i>208,716</i>	<i>689,094</i>
<b>CARTS DEVIATED-FIXED ROUTE</b>									
10 - Woodburn / Salem	DFR	1,120	902	760	2,782	1,058	956	666	2,680
20 - Silverton / Salem	DFR	1,179	1,023	800	3,002	1,016	851	711	2,578
30 - Canyon Connector / Salem	DFR	1,489	1,343	1,311	4,143	968	997	833	2,798
40 - Polk County / Salem	DFR	2,272	1,811	1,667	5,750	2,041	1,875	1,499	5,415
50 - Dallas / Salem Express	DFR	1,627	1,379	1,362	4,368	1,282	1,320	1,184	3,786
<b>Total</b>		<b>7,687</b>	<b>6,458</b>	<b>5,900</b>	<b>20,045</b>	<b>6,365</b>	<b>5,999</b>	<b>4,893</b>	<b>17,257</b>
<b>CARTS ZONE ROUTE</b>									
25 - North Marion Flex	ZR	126	111	91	328	144	127	177	448
45 - Polk Flex	ZR	2,271	1,603	1,817	5,691	1,903	1,785	1,603	5,291
<b>Total</b>		<b>2,397</b>	<b>1,714</b>	<b>1,908</b>	<b>6,019</b>	<b>2,047</b>	<b>1,912</b>	<b>1,780</b>	<b>5,739</b>
<b>CARTS DIAL-A-RIDE</b>									
35 - Canyon Flex	DAR	94	103	41	238	33	32	73	138
<b>CARTS Total</b>		<b>10,178</b>	<b>8,275</b>	<b>7,849</b>	<b>26,302</b>	<b>8,445</b>	<b>7,943</b>	<b>6,746</b>	<b>23,134</b>
<b>SHOPPER SHUTTLE &amp; DIAL-A-RIDE</b>									
RED Line Dial-a-Ride	DAR	343	263	336	942	377	393	414	1,184
RED Line Shopper Shuttle	SS	332	277	349	958	299	275	246	820
<b>Total</b>		<b>675</b>	<b>540</b>	<b>685</b>	<b>1,900</b>	<b>676</b>	<b>668</b>	<b>660</b>	<b>2,004</b>
<b>PARATRANSIT</b>									
CherryLift	DAR	13,372	11,152	12,574	37,098	12,370	11,233	9,731	33,334

F = Frequent, S = Standard, B = Basic, X = Express, DR = Demand Responsive, T = Tripper, DFR = Deviated-Fixed Route, ZR = Zone Route, DAR = Dial-a-Ride, SS = Shopper Shuttle

**Table 6. Average Boardings / Day**

Route	Type	FY16 Q2				FY17 Q2				Percent Change
		Oct 2015	Nov 2015	Dec 2015	Total	Oct 2016	Nov 2016	Dec 2016	Total	
<b>CHERRIOTS LOCAL FIXED-ROUTE</b>										
1 - N River Rd / S Commercial	F	2,465.8	2,354.1	2,194.2	2,337.3	2,487.0	2,507.8	2,253.0	2,414.4	3.3%
2 - Market / Brown	F	1,236.5	1,153.7	961.5	1,115.5	1,278.0	1,285.9	968.5	1,175.7	5.4%
3 - Portland Road	S	880.5	692.8	604.5	727.5	683.6	675.5	557.8	638.4	-12.3%
4/4A State / Lancaster	S	760.4	698.7	648.0	702.6	606.9	607.0	524.8	579.1	-17.6%
4 - State / Lancaster	S	396.4	368.4	329.6	364.7	295.2	275.6	248.0	272.9	-25.2%
4A - State / Lancaster	S	364.0	330.3	318.4	337.9	311.6	331.4	276.8	306.2	-9.4%
5/5A - Edgewater / Center	F	1,593.0	1,527.1	1,402.8	1,506.7	1,561.4	1,625.2	1,453.1	1,545.3	2.6%
5 - Edgewater / Center	F	801.5	818.6	781.5	799.7	786.6	831.3	738.8	784.8	-1.9%
5A - Edgewater / Center	F	791.5	708.5	621.3	707.0	774.9	793.9	714.3	760.5	7.6%
6 - Wallace / Fairview Industrial	B	430.1	481.8	419.9	442.1	423.7	399.7	364.0	395.7	-10.5%
7 - Mission / State	B	275.2	272.6	243.8	263.5	307.0	287.7	237.0	277.1	5.2%
8/8A - 12th / Liberty	S	846.5	788.8	696.5	776.7	747.4	805.7	688.8	746.3	-3.9%
8 - 12th / Liberty	S	413.0	326.2	349.8	364.8	370.9	421.9	356.1	382.4	4.8%
8A - 12th / Liberty	S	433.4	462.6	346.7	411.9	376.5	383.8	332.6	364.0	-11.6%
9/9A - Cherry / Parkmeadow	S	472.2	443.4	376.0	429.9	424.1	412.5	374.7	403.6	-6.1%
9 - Cherry / Parkmeadow	S	249.2	238.6	200.2	228.9	206.8	203.5	188.7	199.6	-12.8%
9A - Cherry / Parkmeadow	S	223.0	204.8	175.8	201.0	217.3	209.0	186.0	204.0	1.5%
10 - Lansing / Hawthorne	B	131.2	135.3	115.1	126.8	127.6	137.7	100.3	121.6	-4.1%
11 - Lancaster / Keizer	F	2,256.1	2,052.9	1,802.4	2,036.4	1,982.6	1,998.1	1,580.6	1,851.4	-9.1%
12 - Haysville Drive	B	130.5	137.4	113.7	126.7	85.8	86.4	62.6	78.1	-38.4%
13 - Silverton Road	S	529.2	500.2	415.0	480.6	473.6	462.8	378.1	437.7	-8.9%
14 - Windsor Island	S	126.5	110.3	84.5	106.9	95.0	96.9	72.1	87.9	-17.8%
15X - Airport Rd Park & Ride Express	X	N/A	N/A	N/A	N/A	83.9	87.7	82.2	84.5	N/A
<b>Total</b>		<b>12,133.8</b>	<b>11,349.1</b>	<b>10,078.0</b>	<b>11,179.2</b>	<b>11,367.4</b>	<b>11,476.2</b>	<b>9,697.6</b>	<b>10,836.9</b>	<b>-3.1%</b>
<b>CHERRIOTS EXPRESS ROUTES</b>										
1X - Willsonville / Salem Express	X	146.7	130.3	127.1	134.9	142.9	137.5	115.2	131.7	-2.4%
2X - Grand Ronde / Salem Express	X	82.4	81.8	83.1	82.5	66.9	71.1	68.4	68.8	-16.6%
<b>Total</b>		<b>229.1</b>	<b>212.2</b>	<b>210.3</b>	<b>217.4</b>	<b>209.8</b>	<b>208.6</b>	<b>183.6</b>	<b>200.5</b>	<b>-7.8%</b>
<b>CHERRIOTS ON-DEMAND</b>										
West Salem Connector	DR	59.5	49.8	34.9	48.0	52.7	50.9	34.8	46.0	-4.1%
<b>CHERRIOTS QUALIFIED HUMAN SERVICE ORGANIZATION ROUTES</b>										
91 - Garten Foundation	T	15.3	43.4	32.9	29.9	14.7	13.4	10.4	12.8	-57.2%
92 - Rockwest	T	25.4	20.8	35.3	27.5	20.8	21.3	12.6	18.2	-33.9%
<b>Total</b>		<b>40.7</b>	<b>64.3</b>	<b>68.1</b>	<b>57.4</b>	<b>35.4</b>	<b>34.7</b>	<b>23.0</b>	<b>31.0</b>	<b>-46.0%</b>
<b>Cherriots Total</b>		<b>12,463.0</b>	<b>11,675.4</b>	<b>10,391.3</b>	<b>11,454.0</b>	<b>11,665.3</b>	<b>11,770.3</b>	<b>9,938.9</b>	<b>11,114.4</b>	<b>-3.0%</b>
<b>CARTS DEVIATED-FIXED ROUTE</b>										
10 - Woodburn / Salem	DFR	50.9	47.5	34.5	44.2	50.4	47.8	31.7	43.2	-2.1%
20 - Silverton / Salem	DFR	53.6	53.8	36.4	47.7	48.4	42.6	33.9	41.6	-12.7%
30 - Canyon Connector / Salem	DFR	67.7	70.7	59.6	65.8	46.1	49.9	39.7	45.1	-31.4%
40 - Polk County / Salem	DFR	103.3	95.3	75.8	91.3	97.2	93.8	71.4	87.3	-4.3%
50 - Dallas / Salem Express	DFR	74.0	72.6	61.9	69.3	61.0	66.0	56.4	61.1	-11.9%
<b>Total</b>		<b>349.4</b>	<b>339.9</b>	<b>268.2</b>	<b>318.2</b>	<b>303.1</b>	<b>300.0</b>	<b>233.0</b>	<b>278.3</b>	<b>-12.5%</b>
<b>CARTS ZONE ROUTE</b>										
25 - North Marion Flex	ZR	5.7	5.8	4.1	5.2	6.9	6.4	8.4	7.2	38.8%
45 - Polk Flex	ZR	103.2	84.4	82.6	90.3	90.6	89.3	76.3	85.3	-5.5%
<b>Total</b>		<b>109.0</b>	<b>90.2</b>	<b>86.7</b>	<b>95.5</b>	<b>97.5</b>	<b>95.6</b>	<b>84.8</b>	<b>92.6</b>	<b>-3.1%</b>
<b>CARTS DIAL-A-RIDE</b>										
35 - Canyon Flex	DAR	4.3	5.4	1.9	3.8	1.6	1.6	3.5	2.2	-41.1%
<b>CARTS Total</b>		<b>462.6</b>	<b>435.5</b>	<b>356.8</b>	<b>417.5</b>	<b>402.1</b>	<b>397.2</b>	<b>321.2</b>	<b>373.1</b>	<b>-10.6%</b>
<b>SHOPPER SHUTTLE &amp; DIAL-A-RIDE</b>										
RED Line Dial-a-Ride	DAR	15.6	13.8	15.3	15.0	18.0	19.7	19.7	19.1	27.7%
RED Line Shopper Shuttle	SS	15.1	14.6	15.9	15.2	14.2	13.8	11.7	13.2	-13.0%
<b>Total</b>		<b>30.7</b>	<b>28.4</b>	<b>31.1</b>	<b>30.2</b>	<b>32.2</b>	<b>33.4</b>	<b>31.4</b>	<b>32.3</b>	<b>7.2%</b>
<b>PARATRANSIT</b>										
CherryLift	DAR	607.8	586.9	571.5	588.9	589.0	561.7	463.4	537.6	-8.7%

F = Frequent, S = Standard, B = Basic, X = Express, DR = Demand Responsive, T = Tripper, DFR = Deviated-Fixed Route, ZR = Zone Route, DAR = Dial-a-Ride, SS = Shopper Shuttle

**Table 7. Average Boardings / Hour**

Route	Type	FY16 Q2				FY17 Q2				Percent Change
		Oct 2015	Nov 2015	Dec 2015	Total	Oct 2016	Nov 2016	Dec 2016	Total	
<b>CHERRIOTS LOCAL FIXED-ROUTE</b>										
1 - N River Rd / S Commercial	F	25.1	22.2	20.7	22.6	23.6	23.8	21.4	23.0	1.5%
2 - Market / Brown	F	22.8	21.3	17.8	20.6	23.6	23.8	17.9	21.7	5.4%
3 - Portland Road	S	29.2	22.9	20.0	24.1	22.8	22.5	18.6	21.3	-11.6%
4/4A State / Lancaster	S	24.9	22.8	21.2	23.0	19.9	19.9	17.2	18.9	-17.5%
4 - State / Lancaster	S	25.9	24.1	21.5	23.8	19.3	18.0	16.2	17.8	-25.0%
4A - State / Lancaster	S	23.8	21.6	20.8	22.1	20.4	21.7	18.1	20.0	-9.4%
5/5A - Edgewater / Center	F	17.3	16.6	15.2	16.4	16.6	17.3	15.5	16.5	0.6%
5 - Edgewater / Center	F	17.0	17.3	16.6	16.9	16.4	17.4	15.4	16.4	-3.2%
5A - Edgewater / Center	F	17.6	15.8	13.8	15.7	16.8	17.2	15.5	16.5	4.9%
6 - Wallace / Fairview Industrial	B	13.2	14.8	12.9	13.6	13.2	12.5	11.4	12.4	-9.0%
7 - Mission / State	B	17.6	17.5	15.6	16.9	19.7	18.4	15.2	17.7	5.1%
8/8A - 12th / Liberty	S	18.4	17.1	15.1	16.9	16.3	17.6	15.1	16.3	-3.3%
8 - 12th / Liberty	S	17.9	14.1	15.1	15.8	16.1	18.3	15.5	16.6	5.5%
8A - 12th / Liberty	S	18.9	20.2	15.1	18.0	16.5	16.8	14.6	16.0	-11.1%
9/9A - Cherry / Parkmeadow	S	15.4	14.4	12.2	14.0	13.8	13.4	12.2	13.2	-5.9%
9 - Cherry / Parkmeadow	S	16.2	15.5	13.0	14.9	13.5	13.3	12.3	13.0	-12.7%
9A - Cherry / Parkmeadow	S	14.5	13.3	11.4	13.1	14.2	13.6	12.1	13.3	1.9%
10 - Lansing / Hawthorne	B	8.7	9.0	7.6	8.4	8.6	9.2	6.7	8.2	-3.3%
11 - Lancaster / Keizer	F	25.6	23.3	20.5	23.1	22.0	22.2	17.5	20.5	-11.0%
12 - Haysville Drive	B	8.5	8.9	7.4	8.2	5.6	5.6	4.1	5.1	-38.2%
13 - Silverton Road	S	17.6	16.5	13.8	15.9	15.5	15.1	12.4	14.3	-10.1%
14 - Windsor Island	S	8.2	7.2	5.5	7.0	6.2	6.3	4.7	5.7	-18.2%
15X - Airport Rd Park & Ride Express	X	N/A	N/A	N/A	N/A	4.2	4.3	4.1	4.2	N/A
Total		20.4	18.8	16.7	18.7	18.2	18.4	15.5	17.4	-6.9%
<b>CHERRIOTS EXPRESS ROUTES</b>										
1X - Willsonville / Salem Express	X	17.3	15.4	15.0	15.9	14.5	14.0	11.7	13.4	-15.9%
2X - Grand Ronde / Salem Express	X	5.4	5.4	5.5	5.4	4.4	4.7	4.5	4.5	-16.6%
Total		9.7	9.0	8.9	9.2	8.4	8.3	7.3	8.0	-12.8%
<b>CHERRIOTS ON-DEMAND</b>										
West Salem Connector	DR	4.0	3.3	2.3	3.2	3.5	3.4	2.6	3.2	-0.9%
<b>CHERRIOTS QUALIFIED HUMAN SERVICE ORGANIZATION ROUTES</b>										
91 - Garten Foundation	T	33.7	91.7	65.7	62.8	34.2	29.8	24.2	29.4	-53.2%
92 - Rockwest	T	37.2	30.5	51.7	40.2	39.6	38.7	24.0	34.1	-15.2%
Total		35.8	55.5	57.7	49.5	37.2	34.7	24.1	32.0	-68.4%
Cherriots Total		19.6	18.2	16.2	18.3	17.5	17.7	15.0	16.7	-8.9%
<b>CARTS DEVIATED-FIXED ROUTE</b>										
10 - Woodburn / Salem	DFR	6.0	5.6	4.1	5.2	5.8	5.5	3.7	5.0	-4.2%
20 - Silverton / Salem	DFR	6.2	6.3	4.2	5.5	5.9	4.9	3.8	4.9	-11.7%
30 - Canyon Connector / Salem	DFR	7.6	7.9	6.6	7.3	4.7	5.1	3.9	4.6	-37.7%
40 - Polk County / Salem	DFR	11.4	10.4	8.3	10.0	10.1	9.5	7.2	8.9	-10.8%
50 - Dallas / Salem Express	DFR	10.2	10.0	8.6	9.6	8.3	9.3	7.5	8.3	-12.8%
Total		8.2	8.0	6.3	7.5	7.0	6.8	5.2	6.3	-15.9%
<b>CARTS ZONE ROUTE</b>										
25 - North Marion Flex	ZR	0.8	0.8	0.6	0.7	0.9	0.9	1.1	1.0	40.2%
45 - Polk Flex	ZR	6.9	5.6	5.5	6.0	6.1	6.0	5.3	5.8	-3.8%
Total		4.9	4.0	3.9	4.3	4.4	4.4	3.9	4.2	-1.6%
<b>CARTS DIAL-A-RIDE</b>										
35 - Canyon Flex	DAR	0.7	1.1	0.5	0.8	0.3	0.3	0.9	0.5	-34.3%
CARTS Total		6.5	6.2	5.2	6.0	5.7	5.6	4.6	5.3	-11.7%
<b>SHOPPER SHUTTLE &amp; DIAL-A-RIDE</b>										
RED Line Dial-a-Ride	DAR	1.6	1.6	2.8	1.9	1.6	1.7	1.6	1.6	-15.5%
RED Line Shopper Shuttle	SS	2.3	2.3	1.8	2.1	2.5	2.2	2.2	2.3	9.0%
Total		1.9	1.9	2.2	2.0	1.9	1.9	1.8	1.8	-8.2%
<b>PARATRANSIT</b>										
CherryLift	DAR	2.5	2.4	2.4	2.4	2.4	2.3	2.1	2.3	-6.3%

F = Frequent, S = Standard, B = Basic, X = Express, DR = Demand Responsive, T = Tripper, DFR = Deviated-Fixed Route, ZR = Zone Route, DAR = Dial-a-Ride, SS = Shopper Shuttle

**Table 8.** Total Boardings using State Bus Pass Program

Route	FY17 Q2			
	Oct 2016	Nov 2016	Dec 2016	Total
(Service Days)	21	20	21	62
<b>CHERRIOTS LOCAL FIXED-ROUTE</b>				
<b>1 - N River Rd / S Commercial</b>	1,038	1,136	1,276	3,450
<b>2 - Market / Brown</b>	364	369	401	1,134
<b>3 - Portland Road</b>	351	336	298	985
<b>4/4A State / Lancaster</b>	125	92	163	380
<i>4 - State / Lancaster</i>	64	51	96	211
<i>4A - State / Lancaster</i>	61	41	67	169
<b>5/5A - Edgewater / Center</b>	548	577	664	1,789
<i>5 - Edgewater / Center</i>	360	372	469	1,201
<i>5A - Edgewater / Center</i>	188	205	195	588
<b>6 - Wallace / Fairview Industrial</b>	244	219	223	686
<b>7 - Mission / State</b>	27	22	49	98
<b>8/8A - 12th / Liberty</b>	715	550	627	1,892
<i>8 - 12th / Liberty</i>	344	294	301	939
<i>8A - 12th / Liberty</i>	371	256	326	953
<b>9/9A - Cherry / Parkmeadow</b>	292	286	317	895
<i>9 - Cherry / Parkmeadow</i>	132	150	156	438
<i>9A - Cherry / Parkmeadow</i>	160	136	161	457
<b>10 - Lansing / Hawthorne</b>	8	12	13	33
<b>11 - Lancaster / Keizer</b>	42	40	74	156
<b>12 - Haysville Drive</b>	4	2	1	7
<b>13 - Silverton Road</b>	121	143	130	394
<b>14 - Windsor Island</b>	14	10	12	36
<b>15X - Airport Rd Park &amp; Ride Express</b>	993	849	827	2,669
<i>Total</i>	4,886	4,643	5,075	14,604
<b>CHERRIOTS EXPRESS ROUTES</b>				
<b>1X - Willsonville / Salem Express</b>	1,567	1,310	1,153	4,030
<b>CHERRIOTS ON-DEMAND</b>				
<b>West Salem Connector</b>	0	0	0	0
<i>Total</i>	6,453	5,953	6,228	18,634
<b>% of System Boardings</b>	2.7%	2.6%	3.0%	2.7%

**Table 9. Average Boardings / Day using State Bus Pass Program**

	FY17 Q2			
	Oct 2016	Nov 2016	Dec 2016	Average
<b>CHERRIOTS LOCAL FIXED-ROUTE</b>				
<b>1 - N River Rd / S Commercial</b>	49.4	56.8	60.8	55.6
<b>2 - Market / Brown</b>	17.3	18.5	19.1	18.3
<b>3 - Portland Road</b>	16.7	16.8	14.2	15.9
<b>4/4A State / Lancaster</b>	6.0	4.6	7.8	6.1
<i>4 - State / Lancaster</i>	3.0	2.6	4.6	3.4
<i>4A - State / Lancaster</i>	2.9	2.1	3.2	2.7
<b>5/5A - Edgewater / Center</b>	26.1	28.9	31.6	28.9
<i>5 - Edgewater / Center</i>	17.1	18.6	22.3	19.4
<i>5A - Edgewater / Center</i>	9.0	10.3	9.3	9.5
<b>6 - Wallace / Fairview Industrial</b>	11.6	11.0	10.6	11.1
<b>7 - Mission / State</b>	1.3	1.1	2.3	1.6
<b>8/8A - 12th / Liberty</b>	34.0	27.5	29.9	30.5
<i>8 - 12th / Liberty</i>	16.4	14.7	14.3	15.1
<i>8A - 12th / Liberty</i>	17.7	12.8	15.5	15.4
<b>9/9A - Cherry / Parkmeadow</b>	13.9	14.3	15.1	14.4
<i>9 - Cherry / Parkmeadow</i>	6.3	7.5	7.4	7.1
<i>9A - Cherry / Parkmeadow</i>	7.6	6.8	7.7	7.4
<b>10 - Lansing / Hawthorne</b>	0.4	0.6	0.6	0.5
<b>11 - Lancaster / Keizer</b>	2.0	2.0	3.5	2.5
<b>12 - Haysville Drive</b>	0.2	0.1	0.0	0.1
<b>13 - Silverton Road</b>	5.8	7.2	6.2	6.4
<b>14 - Windsor Island</b>	0.7	0.5	0.6	0.6
<b>15X - Airport Rd Park &amp; Ride Express</b>	47.3	42.5	39.4	43.0
<i>Total</i>	232.7	232.2	241.7	235.5
<b>CHERRIOTS EXPRESS ROUTES</b>				
<b>1X - Willsonville / Salem Express</b>	74.6	65.5	54.9	65.0
<b>CHERRIOTS ON-DEMAND</b>				
<b>West Salem Connector</b>	0.0	0.0	0.0	0.0
<i>Total</i>	307.3	297.7	296.6	300.5



**Table 10. State Bus Pass Program Share of Boardings and Customer Comments**

	Jun 2016	Jul 2016	Aug 2016	Sept 2016	Oct 2016	Nov 2016	Dec 2016	Jan 2017	Feb 2017	Mar 2017	Apr 2017	May 2017	June 2017	Total
(Service Days)	22	20	23	21	21	20	21	TBD	TBD	TBD	TBD	TBD	TBD	148
<b>BOARDINGS</b>														
1X - Willsonville / Salem Express	1,288	1,344	1,518	1,510	1,567	1,310	1,153	TBD	TBD	TBD	TBD	TBD	TBD	9,690
15X - Airport Rd Park & Ride Express	455	711	1,061	888	993	849	827	TBD	TBD	TBD	TBD	TBD	TBD	5,784
All Other Routes	2,275	3,298	4,258	3,654	3,893	3,794	4,248	TBD	TBD	TBD	TBD	TBD	TBD	25,420
Total	4,018	5,353	6,837	6,052	6,453	5,953	6,228	TBD	TBD	TBD	TBD	TBD	TBD	40,894
<b>BOARDINGS / DAY</b>														Average
1X - Willsonville / Salem Express	58.5	67.2	66.0	71.9	74.6	65.5	54.9	TBD	TBD	TBD	TBD	TBD	TBD	65.5
15X - Airport Rd Park & Ride Express	20.7	35.6	46.1	42.3	47.3	42.5	39.4	TBD	TBD	TBD	TBD	TBD	TBD	39.1
All Other Routes	103.4	164.9	185.1	174.0	185.4	189.7	202.3	TBD	TBD	TBD	TBD	TBD	TBD	171.8
Total	182.6	267.7	297.3	288.2	307.3	297.7	296.6	TBD	TBD	TBD	TBD	TBD	TBD	276.3
<b>SHARE OF BOARDINGS / DAY</b>														
1X - Willsonville / Salem Express	32%	25%	22%	25%	24%	22%	19%	TBD	TBD	TBD	TBD	TBD	TBD	24%
15X - Airport Rd Park & Ride Express	11%	13%	16%	15%	15%	14%	13%	TBD	TBD	TBD	TBD	TBD	TBD	14%
All Other Routes	57%	62%	62%	60%	60%	64%	68%	TBD	TBD	TBD	TBD	TBD	TBD	62%
Total	100%	100%	100%	100%	100%	100%	100%	TBD	TBD	TBD	TBD	TBD	TBD	100%
<b>COMMENTS</b>														
Complaints	0	0	0	0	0	0	0	TBD	TBD	TBD	TBD	TBD	TBD	0
Compliments	0	0	0	0	0	0	0	TBD	TBD	TBD	TBD	TBD	TBD	0

**Table 11. Route 15X**

<b>Route</b>	<b>FY17 Q2</b>			
	<i>Oct 2016</i>	<i>Nov 2016</i>	<i>Dec 2016</i>	<i>Total / Average</i>
(Service Days)	21	20	21	62
<b>Total Boardings</b>	1,762	1,753	1,727	5,242
<b>Average Boardings / Day</b>	83.9	87.7	82.2	84.5
<b>Average Boardings / Hour</b>	4.2	4.3	4.1	4.2

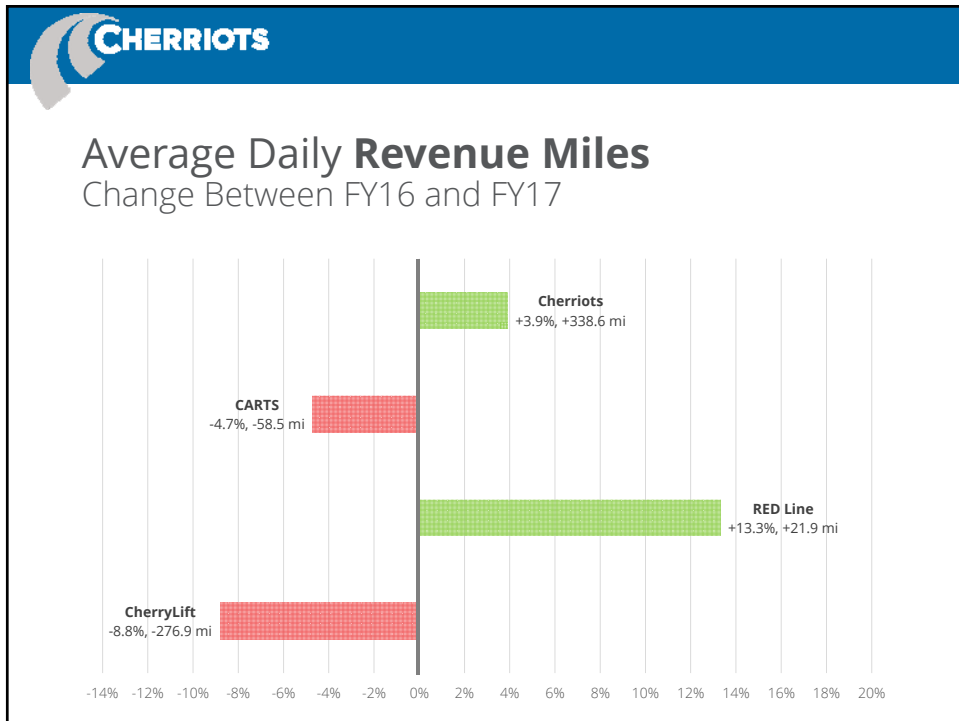
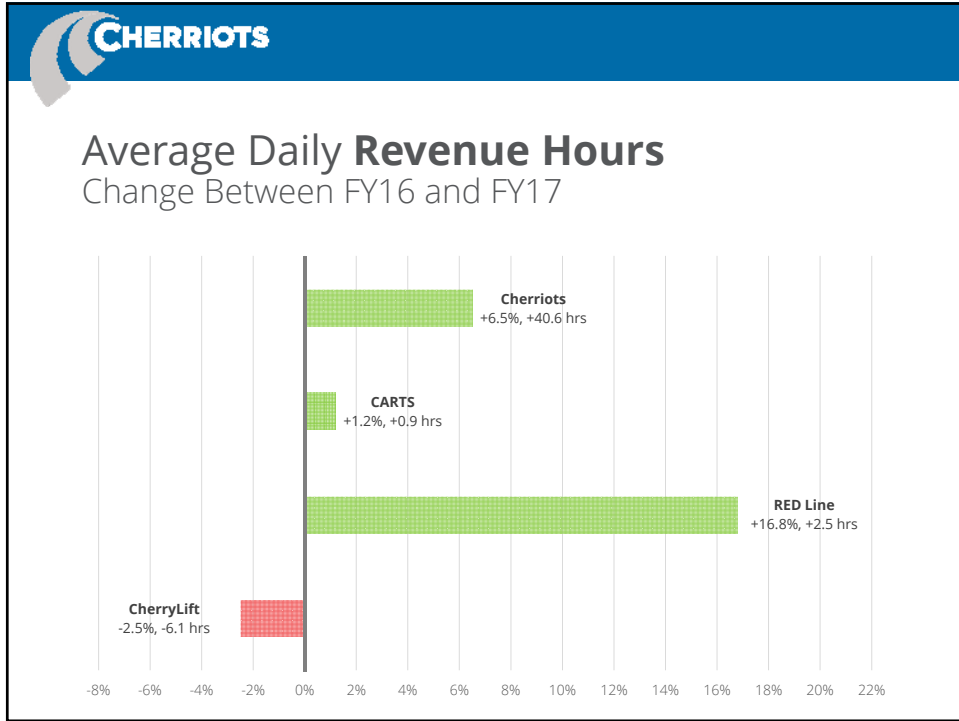
# FY17 Q2 Performance Report

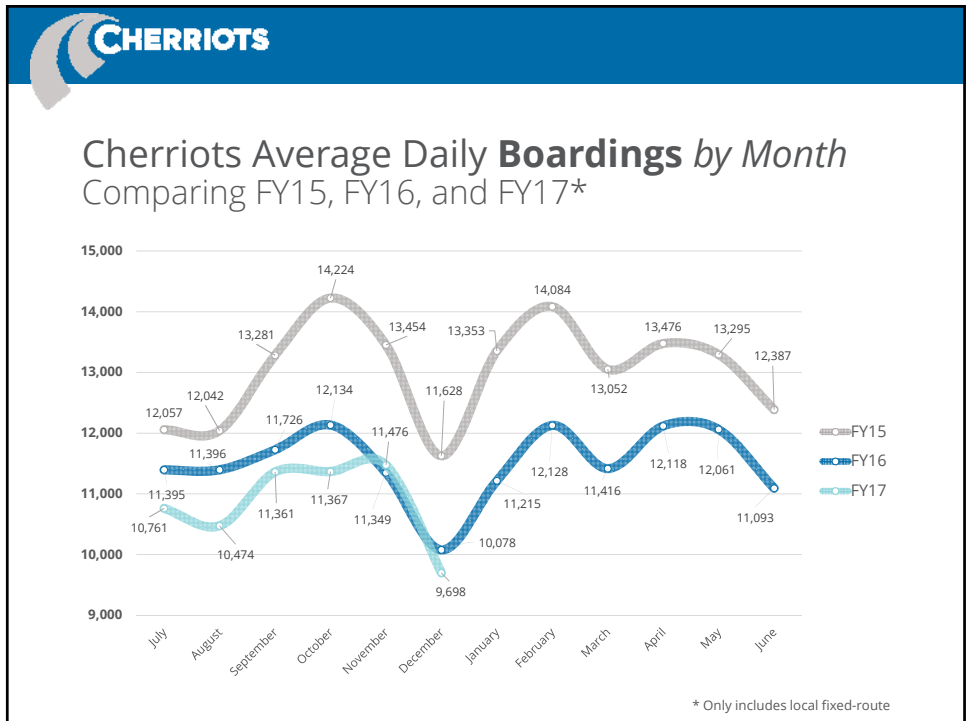
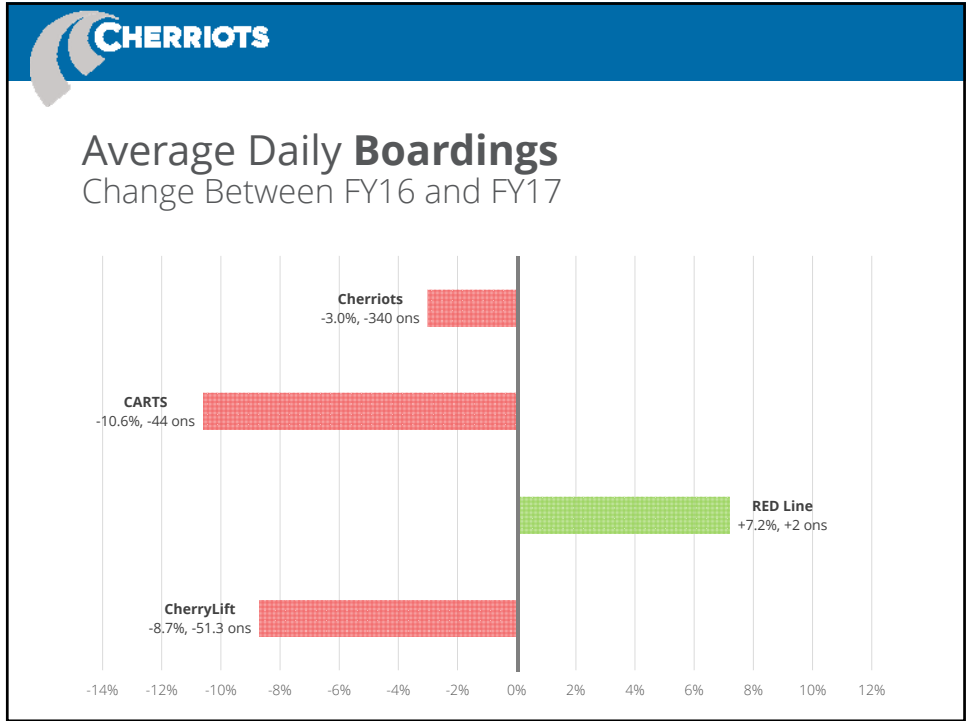
October-December 2016

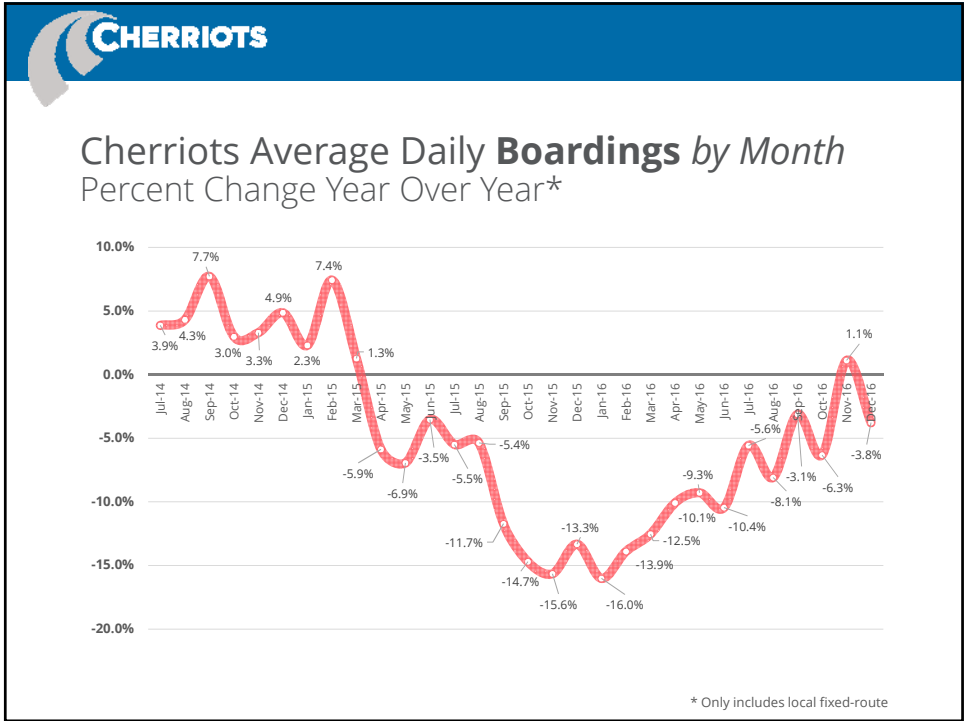


## Changes by Service

FY16 to FY17

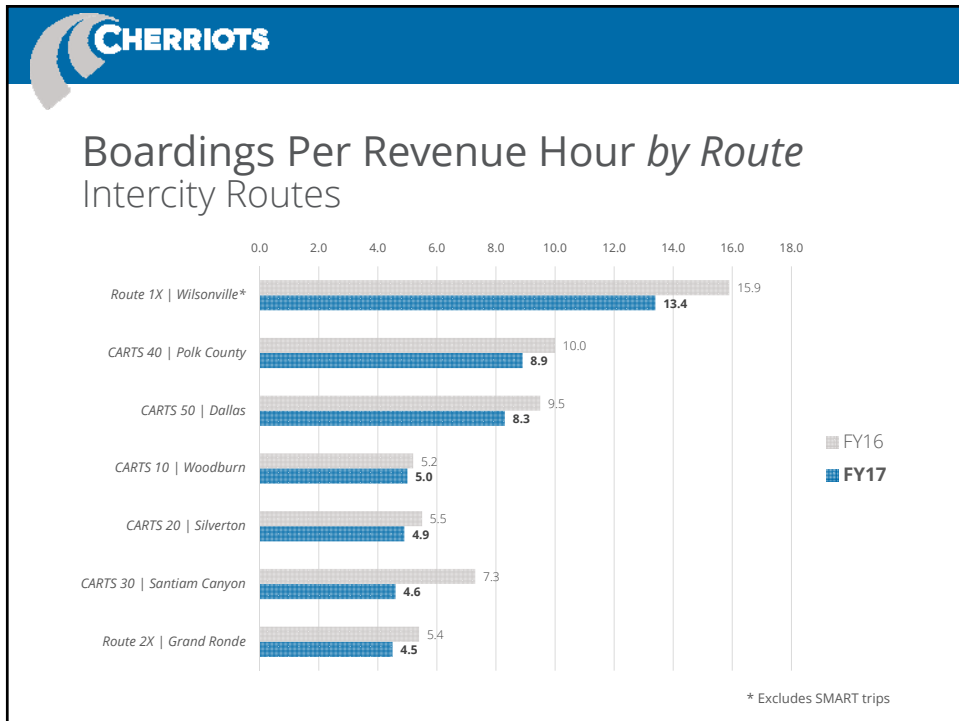
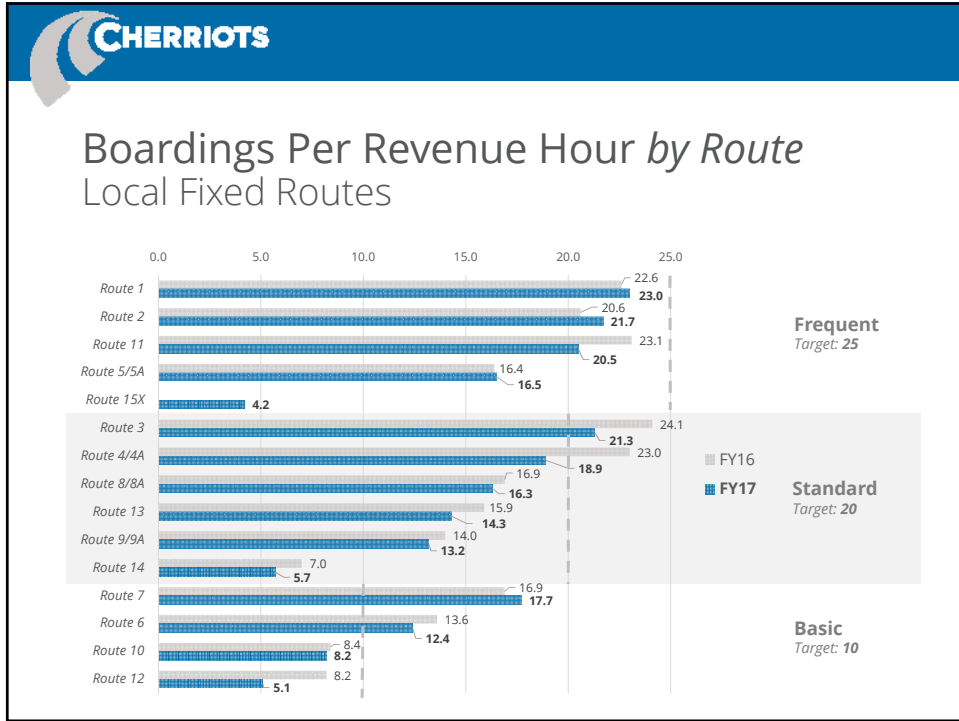


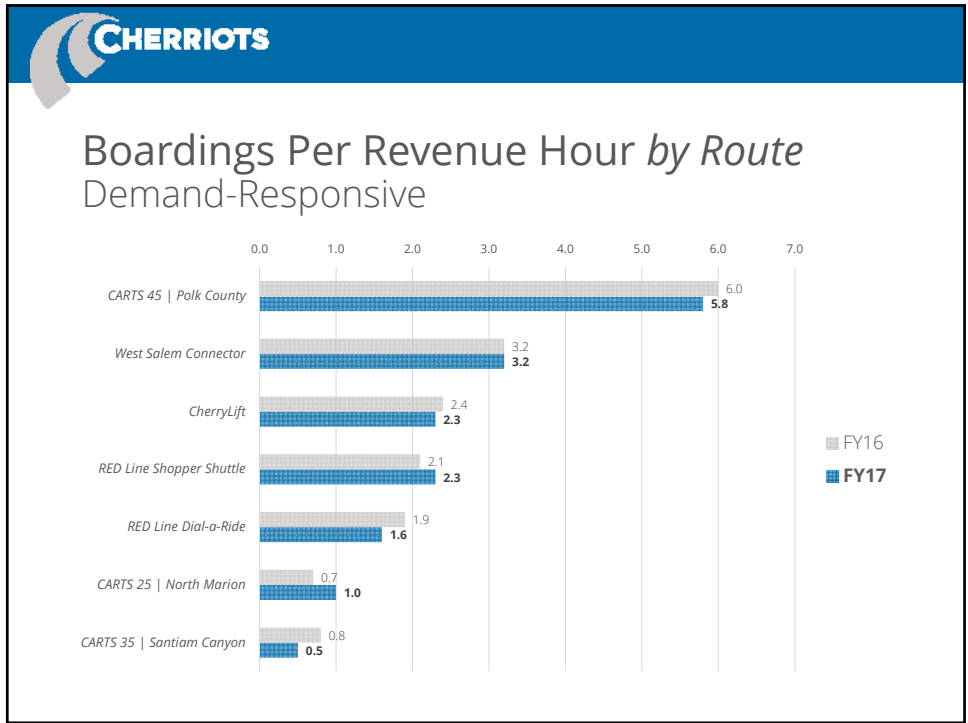




# Changes by Route

## FY16 to FY17

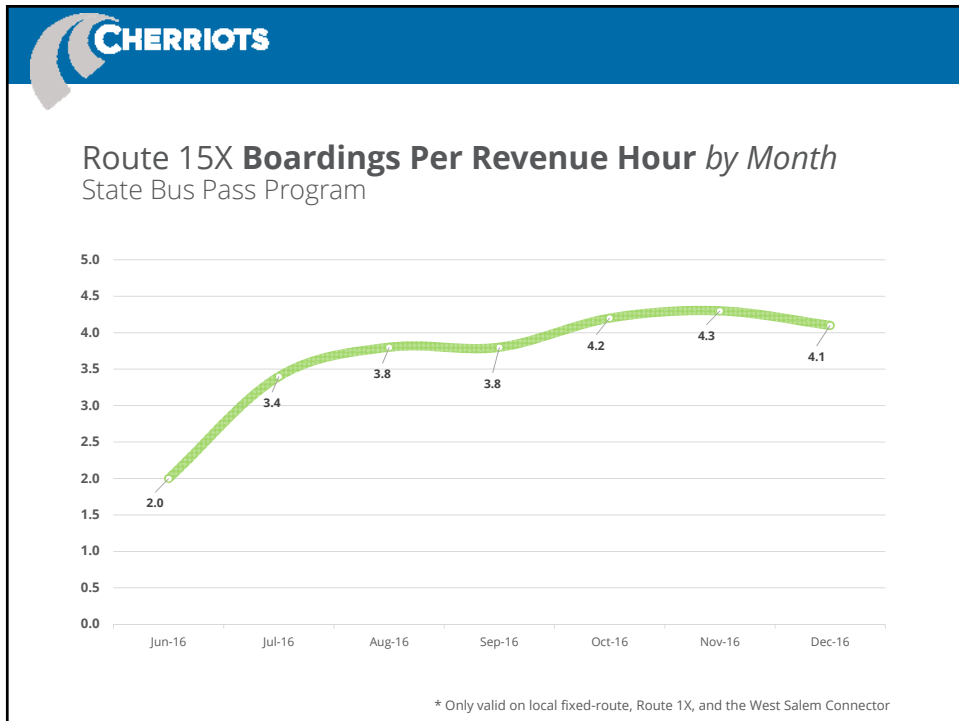
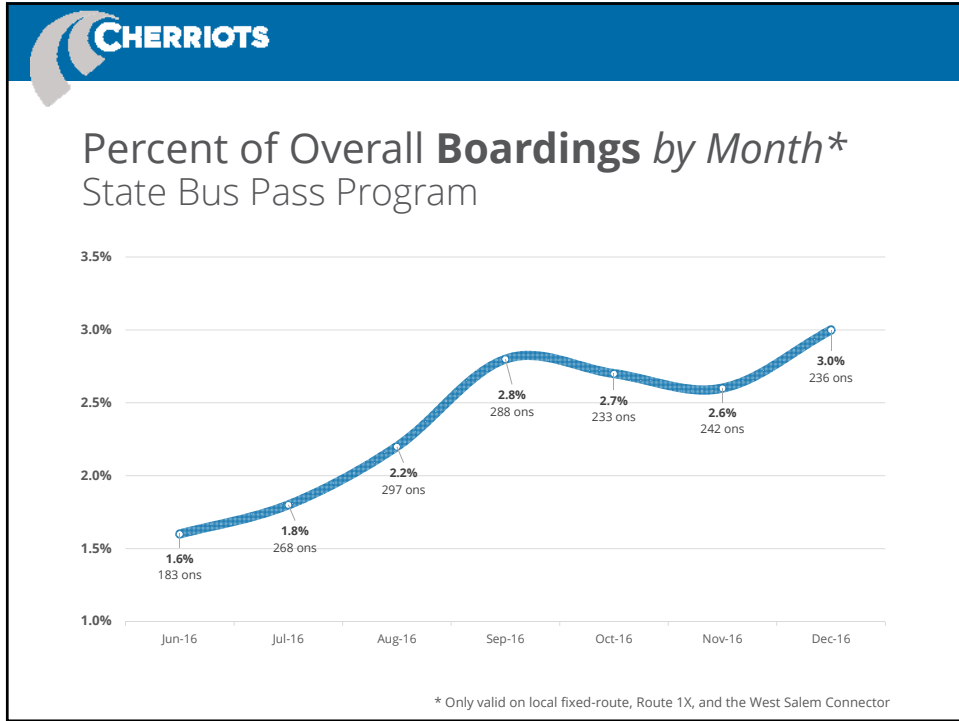




# State Bus Pass Program and Route 15X

June-December 2016







**MEMO TO: BOARD OF DIRECTORS**

**FROM: ROXANNE BELTZ, TRIP CHOICE PROGRAM COORDINATOR  
STEVE DICKEY, DIRECTOR OF TRANSPORTATION DEVELOPMENT**

**THRU: ALLAN POLLOCK, GENERAL MANAGER**

**SUBJECT: CHERRIOTS TRIP CHOICE SECOND QUARTER REPORT**

**Issue**

Shall the Board receive the FY 2016-2017 second quarter report of the Cherriots Trip Choice Program?

**Background and Findings**

Cherriots Trip Choice program activities, goals and metrics are structured around the 2015 – 2017 ODOT approved work plan and the 2015 – 2020 Cherriots Trip Choice Strategic Plan which details specific activities and improvements to the regional TDM program.

During the second quarter the Drive Less Challenge was concluded, staff provided some outreach and education regarding the new buffered bike lanes in Salem and conducted an ETC survey.

**Financial Impact**

None

**Recommendation**

None

**Proposed Motion**

Information Only

**CHERRIOTS TRIP CHOICE**

Second Quarter Report FY 2016-2017

October ~ November ~ December 2016

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During the Second Quarter of FY 2016-2017, Cherrlots Trip Choice continued work in accordance with the recommendations made in the 2015-2020 Strategic Plan. Our tasks and the activities associated with those are detailed in our work plan which can be summarized as, management of the Regional Rideshare Database, providing marketing, outreach and incentives for the use of all transportation options and promotion and expansion of TDM tactics within Polk, Marion and Yamhill Counties.

**DRIVE LESS CONNECT**

Drive Less Connect is Oregon's secure, easy-to-use online ride-matching tool that matches people who want to share the ride to work, school or play.

***Drive Less Connect ~ 2nd Quarter 2016-2017***

<b>Total active users</b> .....	<b>894</b>	Carpool trips .....	6820
<b>Total registered users</b> .....	<b>4655</b>	Did Not Work trips .....	2009
New users.....	197	Vanpool trips .....	2397
Non SOV Miles Logged .....	331,438	Walk trips .....	1654
Bike trips .....	2024	Telework trips .....	848
Bus trips .....	2018	Drive Alone trips .....	1510

**Ridematching statistics:**

Ridematch search performed .....	9200
Ridematch search with no results ...	2230
Ridematch requests sent .....	3991

***2016 Drive Less Challenge***

The annual Oregon Drive Less Challenge encourages people to use a form of transportation other than driving a single occupant vehicle. We encourage people to walk to the store, ride bikes with their kids to school, carpool to work, or find other ways to fit transportation options into their lifestyle.

The 2016 challenge took place Oct. 1-15. Participants across Polk, Marion and Yamhill Counties logged 132,808 non-drive alone miles, reduced CO2 by 86,279 pounds and saved \$11,488 in gasoline. Total regional participation was up 3%, and new users sign up was up 25%. The total amount of trips that were logged was 8,736; up about 4% from last year.

## **PROJECTS AND PROGRESS**

### ***Buffered Bike Lanes***

After receiving some questions about the new buffered bike lanes in town, we designed a new handout that we are starting to distribute through our own networks and also through the City of Salem. The new buffered bike lanes are on Church and High Street downtown and we wanted to ensure that people understand that they act just like regular bike lanes, but have additional buffering on either side.

### ***Employee Transportation Coordinator Survey***

One of the goals of phase one of the Cherriots Trip Choice (CTC) Strategic Plan is to enhance communication with the existing Employee Transportation Coordinator (ETC) network to better leverage our partnerships in the community. The first step was to conduct a survey of the ETCs to better understand what CTC staff can do to support the ETCs in their organizations.

The survey did confirm that the ETCs utilize and appreciate the information and materials we currently share with them, and that the quarterly meetings are useful. Areas that generated little or no interest were using an ETC on-line portal and an ETC competition.

Based on the survey, as well as communication we received during meetings, we have already completed a draft ETC manual. We will also be evaluating the benefits of communication with on-site sustainability and/or health and wellness groups at employer sites to further engage employees at area work sites.

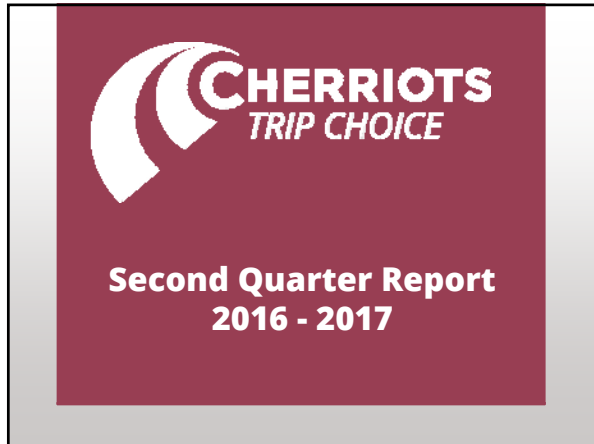
## **OUTREACH and MEETINGS**

Staff participated in the following events or activities:

- Marion County - CHIP Obesity Workgroup meeting
- Cherriots Connects Fall Festival
- Cherriots Connects Holiday Party
- Monthly Salem Chamber Forum Meetings
- Core Values Index discussion
- Attended Community Based Social Marketing Workshop

***Ongoing participation and activities -***

- Association for Commuter Transportation (ACT)
- Board members of Transportation Options Group of Oregon
- Statewide TDM and ToGo quarterly meetings
- Valley VanPool Partnership
- Quarterly ETC networking and training lunch
- Drive Less Connect Regional Network Administrators meetings
- Cherriots Wellness Committee
- Cherriots Connects Committee



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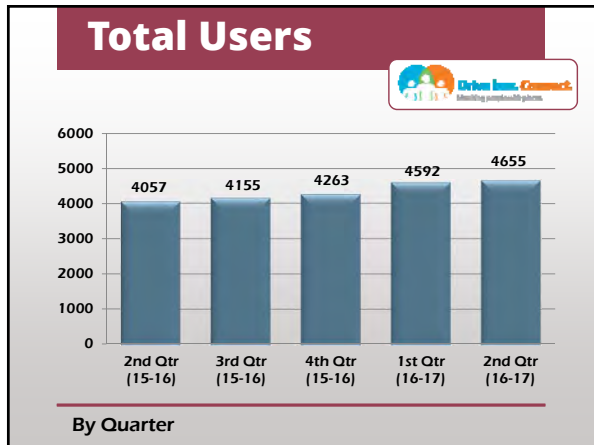
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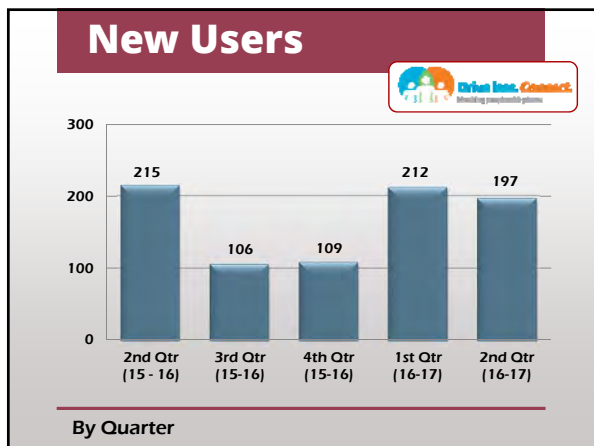
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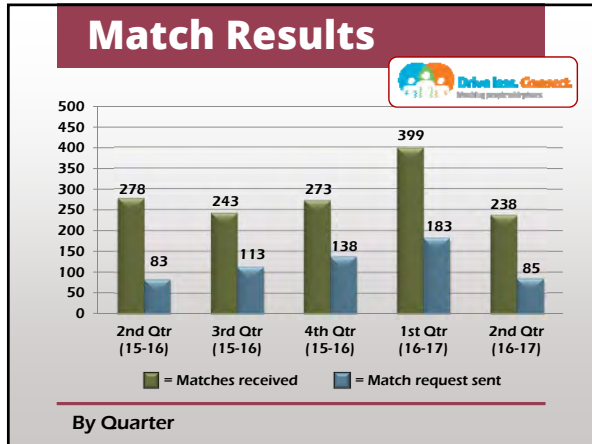
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### Drive Less Challenge

**Local promotion**

- Digital tools for ETC's
- Statesman Journal
- Keizer Times

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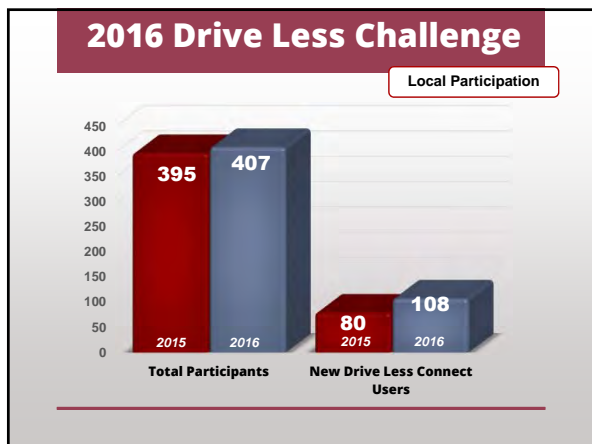
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## 2016 Drive Less Challenge

Total Trips Region wide

- Total Trips Logged: 8,736; up 4% from last year
- Total Non-SOV Miles: 132,808
- 86,279 pounds of CO2 reduced
- \$11,488.68 in gas savings

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## Other Projects

- Buffered Bike Lanes
- Employee Transportation Coordinator Survey
- Additional Wanderwalks 5210 Maps

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**Thank You**

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**MEMO TO: BOARD OF DIRECTORS**

**FROM: WENDY FETH, ACCOUNTANT**  
**PAULA DIXON, DIRECTOR OF ADMINISTRATION**

**THRU: ALLAN POLLOCK, GENERAL MANAGER**

**SUBJECT: FY2017 SECOND QUARTER FINANCE REPORT**

**Issue**

Shall the Board receive the FY2017 second quarter finance report?

**Background and Findings**

The Board adopts a Budget for the District on an annual basis. The Budget is a plan that contains District resources and requirements.

The quarterly finance report provides information about how that plan is being implemented and includes statements for the General Fund, Transportation Programs Fund, and Capital Project Fund. The statements compare the budget amounts to actual amounts by the legal appropriations category.

The District's primary sources of revenue are Federal and State Grant funds and property taxes. Grants are generally reimbursed on a quarterly basis. Most of the property taxes have been received. Therefore, for the 2nd quarter, General Fund revenue is at sixty-one percent of the annual budget.

General Fund expenses are under budget in most appropriation levels. Communication - Customer Service is at fifty-four percent of the annual budget as a long-time employee retired with final payouts and temporary help expenses as a result of the staffing vacancy. Transportation Development - Information Technology is at fifty-four percent of the annual budget as many annual software licenses were paid in the first half of the fiscal year.

The Transportation Programs Fund revenue is at thirty-eight percent of budget primarily due to the reimbursement nature of the federal grants. In the Transportation Programs Fund, all three divisions are close or under budget.

The Transportation Development – Special Transportation Coordination program is at fifty-two percent of the annual budget. A grant to fund a new bus purchase for Legacy Health (\$83,582) was obtained after the budget was adopted. A budget amendment will be brought to the Board later to increase budget appropriations for this grant.

Overall, the Capital Project Fund has spent one percent of the approved budget at the end of the second quarter. Capital projects are broken out by division and further, if there are multiple projects in that division. Many of the capital projects are in the planning or procurement stages. Many of the projects have been carried forward from last year's budget.

**Financial Impact**

None

**Recommendation**

Receive and file

**Proposed Motion**

None

Salem Area Mass Transit District  
 Fiscal Year 2016-17 Second Quarter Financial Report

General Fund Revenues/Resources and Expenses/Requirements Resolution Summary	Actual	50% of Adopted Budget	FY2016-17 Adopted Budget	% of Budget
<b>Operating Revenues/Resources</b>				
Passenger Fares	1,651,030	1,529,500	3,059,000	54%
Other Fixed Route Services	93,460	145,000	290,000	32%
Planning Grant	30,656	60,750	121,500	25%
Federal 5307	597,018	1,987,600	3,975,200	15%
DMAP Reimbursement	26,925	34,000	68,000	40%
Miscellaneous	186,716	58,300	116,600	160% <sup>①</sup>
Property Taxes	10,866,785	5,656,350	11,312,700	96%
Oregon State In-Lieu	1,382,759	2,750,000	5,500,000	25%
Interest on Investments	67,547	40,000	80,000	84%
Energy Tax Credit	177,506	-	-	
<b>Operating Revenues/Resources Total</b>	<b>15,080,402</b>	<b>12,261,500</b>	<b>24,523,000</b>	<b>61%</b>
<b>Operating Expenses/Requirements</b>				
General Manager/Board of Directors	236,509	301,950	603,900	39%
Administration	849,868	906,700	1,813,400	47%
Communication	709,216	791,350	1,582,700	45%
Transportation Development	905,954	993,890	1,987,780	46%
Operations	8,329,617	8,598,400	17,196,800	48%
Unallocated General Administration	502,553	576,700	1,153,400	44%
<b>Operating Expenses/Requirements Total</b>	<b>11,533,717</b>	<b>12,168,990</b>	<b>24,337,980</b>	<b>47%</b>

① Higher than expected miscellaneous revenue from reimbursement of salary for employee working for union and \$74,623 SAIF dividend.

Salem Area Mass Transit District  
 Fiscal Year 2016-17 Second Quarter Financial Report

General Fund Department Expenses/Requirements Summary	Actual	50% of Adopted Budget	FY2016-17 Adopted Budget	% of Budget
<b>General Manager/Board of Directors</b>				
General Manager	230,692	277,200	554,400	42%
Board of Directors	5,817	24,750	49,500	12%
<b>Total</b>	<b>236,509</b>	<b>301,950</b>	<b>603,900</b>	<b>39%</b>
<b>Administration</b>				
Human Resources	286,379	305,850	611,700	47%
Human Resources Safety	91,217	91,750	183,500	50%
Finance	472,272	509,100	1,018,200	46%
<b>Total</b>	<b>849,868</b>	<b>906,700</b>	<b>1,813,400</b>	<b>47%</b>
<b>Communication</b>				
Marketing and Communications	422,428	524,450	1,048,900	40%
Customer Service	286,788	266,900	533,800	54% ②
<b>Total</b>	<b>709,216</b>	<b>791,350</b>	<b>1,582,700</b>	<b>45%</b>
<b>Transportation Development</b>				
Transportation Development Administration	277,004	394,490	788,980	35%
Information Technology	508,670	474,400	948,800	54% ③
Vanpool Lease	120,280	125,000	250,000	48%
<b>Total</b>	<b>905,954</b>	<b>993,890</b>	<b>1,987,780</b>	<b>46%</b>
<b>Operations</b>				
Operations Administration	269,550	246,000	492,000	55%
Vehicle Maintenance	1,936,494	2,157,550	4,315,100	45%
Facility Maintenance	397,145	391,200	782,400	51%
Security	243,408	273,850	547,700	44%
Cherriots Fixed Route Service	5,374,126	5,405,400	10,810,800	50%
West Salem Connector Operations	94,995	100,050	200,100	47%
West Salem Connector Vehicle Maintenance	13,899	24,350	48,700	29%
<b>Total</b>	<b>8,329,617</b>	<b>8,598,400</b>	<b>17,196,800</b>	<b>48%</b>
<b>Unallocated</b>				
General Administration	502,553	576,700	1,153,400	44%

② Payout expense to long-time employee retiring and cost associated with temporary help to fill vacancy.

③ Annual software licenses paid in 1st half of year.

Salem Area Mass Transit District  
 Fiscal Year 2016-17 Second Quarter Financial Report

Transportation Programs Fund Revenues/Resources and Expenses/Requirements Resolution Summary	Actual	50% of Adopted Budget	FY2016-17 Adopted Budget	% of Budget
<b>Operating Revenues/Resources</b>				
Passenger Fares	173,001	188,150	376,300	46%
Federal Direct 5310 Funds	32,328	112,000	224,000	14%
Federal 5311 Funds	73,403	161,450	322,900	23%
Federal New Freedom	15,959	42,850	85,700	19%
Federal 5310 Funds Through State	217,244	364,950	729,900	30%
Rideshare Grant	30,459	99,650	199,300	15%
TDM Grant	25,948	77,250	154,500	17%
DD53 Revenues	663,068	1,300,000	2,600,000	26%
Federal 5307	48,318	411,600	823,200	6%
DMAP Revenues	4,672,477	5,085,050	10,170,100	46%
STF Pass Through Funds	122,000	138,700	277,400	44%
State STF Funds	479,552	609,650	1,219,300	39%
<b>Operating Revenues/Resources Total</b>	<b>6,553,757</b>	<b>8,591,300</b>	<b>17,182,600</b>	<b>38%</b>
<b>Operating Expenses/Requirements</b>				
Operations	7,733,632	8,407,110	16,814,220	46%
Communication	104,545	116,650	233,300	45%
Transportation Development	315,974	330,850	661,700	48%
<b>Operating Expenses/Requirements Total</b>	<b>8,154,151</b>	<b>8,854,610</b>	<b>17,709,220</b>	<b>46%</b>

Salem Area Mass Transit District  
 Fiscal Year 2016-17 Second Quarter Financial Report


Transportation Programs Fund Program Expenses/Requirements Summary	Actual	50% of Adopted Budget	FY2016-17 Adopted Budget	% of Budget
<b>Operations</b>				
CherryLift	2,082,685	2,415,210	4,830,420	43%
RED Line	141,633	151,700	303,400	47%
CARTS	676,961	755,150	1,510,300	45%
DMAP/WVCH	4,832,353	5,085,050	10,170,100	48%
<b>Operations Total</b>	<b>7,733,632</b>	<b>8,407,110</b>	<b>16,814,220</b>	<b>46%</b>
<b>Communication</b>				
Mobility Management/Travel Trainer	104,545	116,650	233,300	45%
<b>Transportation Development</b>				
Special Transportation Coordination	159,219	153,950	307,900	52% ④
Trip Choice	156,755	176,900	353,800	44%
<b>Transportation Development Total</b>	<b>315,974</b>	<b>330,850</b>	<b>661,700</b>	<b>48%</b>
<b>Transportation Programs Fund Total</b>	<b>8,154,151</b>	<b>8,854,610</b>	<b>17,709,220</b>	<b>46%</b>

④ A grant to fund a new bus purchase for Legacy Health (\$83,582) was obtained after the budget was adopted. A budget amendment will be brought to increase this budget at the end of the year if needed.



Salem Area Mass Transit District  
 Fiscal Year 2016-17 Second Quarter Financial Report

Capital Project Fund Revenues/Resources and Expenses/Requirements Resolution Summary	Actual	FY2016-17 Adopted Budget	% of Budget
<b>Capital Revenues/Resources</b>			
Federal STP Funds	2,432	2,248,500	0%
Federal 5310 Funds Through State	363	224,300	0%
Federal Flex Funds	22,697	1,927,600	1%
FTA 5339 Funds	-	1,943,500	0%
Federal 5307	-	2,503,000	0%
Federal STP Funds	269	107,800	0%
Federal 5309 Funds	248	2,385,000	0%
Connect Oregon Funds	-	1,000,000	0%
State STF Funds	-	264,600	0%
<b>Capital Revenues/Resources Total</b>	<b>26,009</b>	<b>12,604,300</b>	<b>0%</b>
<b>Capital Expenses/Requirements</b>			
Administration	1,485	349,000	0%
<b>Transportation Development</b>			
Capital Project Administration	21,134	57,800	37%
Keizer Transit Center	653	1,679,800	0%
South Salem Transit Center	337	1,520,700	0%
Bus Stops & Shelters	47,343	1,720,999	3%
BI Project	-	125,000	0%
Technology Equipment	69,575	232,000	30%
CH2 Improvements	102		
CH2 Lease Space Improvements	5,000	50,000	10%
<b>Operations</b>			
Del Webb Improvements	7,950	330,500	2%
Shop Equipment	-	158,000	0%
Ops Technology Equipment	-	125,000	
Cherriots Revenue Vehicles	5,725	5,950,000	0%
CherryLift Revenue Vehicles	405	635,400	0%
CARTS Revenue Vehicles	405	488,900	0%
<b>Capital Expenses/Requirements Total</b>	<b>160,114</b>	<b>13,423,099</b>	<b>1%</b>



**Second Quarter Financial Report**  
October 1, 2016 - December 31, 2016

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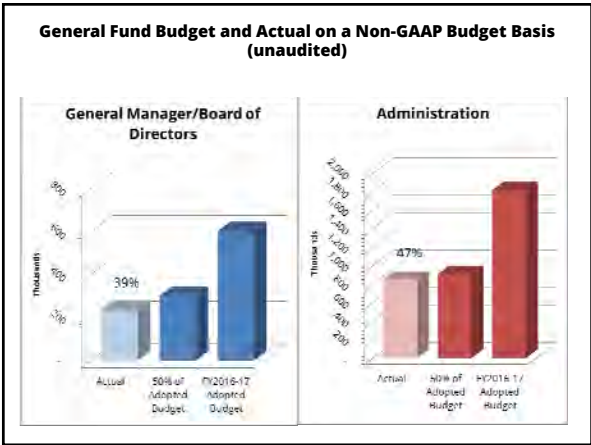
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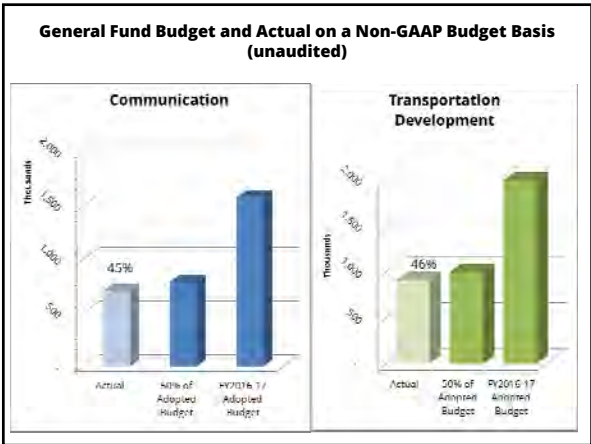
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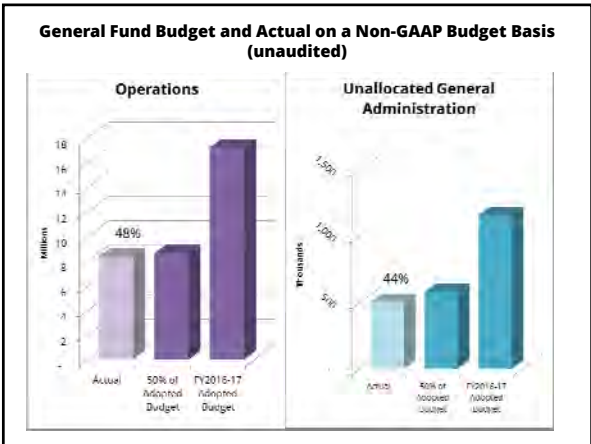
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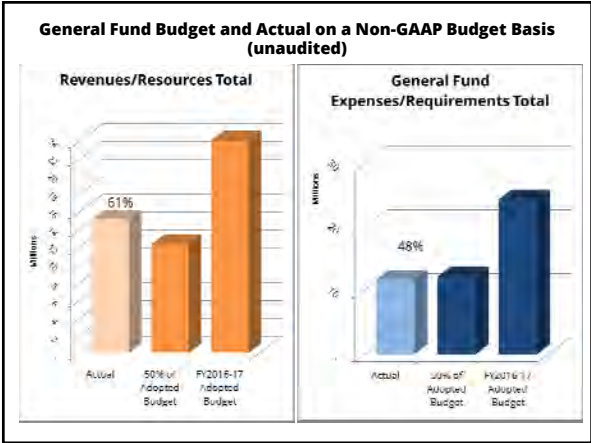
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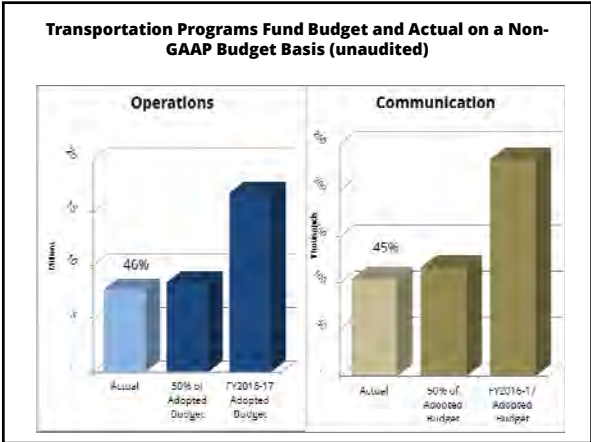
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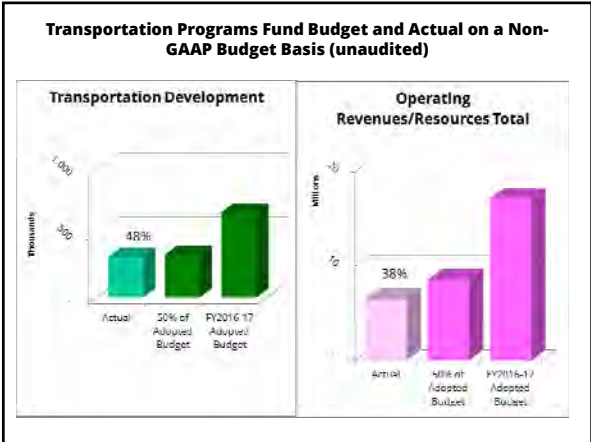
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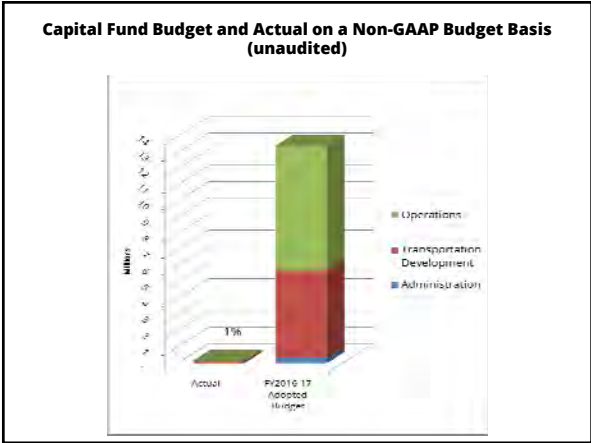
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Questions about the Second Quarter Financial Report?

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**MEMO TO: BOARD OF DIRECTORS**  
**FROM: ALLAN POLLOCK, GENERAL MANAGER**  
**SUBJECT: BOARD MEMBER COMMITTEE REPORT**

**Issue**

Shall the Board report on their committee participation and meetings attended?

**Background and Findings**

Board members are appointed to local, regional, or national committees. Board members also present testimony at public hearings on specific issues as the need arises. After these meetings, public hearings, or other activities attended by individual members on behalf of SAMTD, time will be scheduled for an oral report/update. The following activities have designated board member representation:

<b><u>Board/Committee</u></b>	<b><u>Director(s)</u></b>
Special Transportation Fund Advisory Committee (STFAC)	Director Hammill Alternate: Director Thompson
Mid-Willamette Area Commission on Transportation (MWACT)	Director Kelley Alternate: Director Lincoln
Mid-Willamette Valley Council of Governments (MWVCOG)	Director Thompson Alternate: President Krebs
Salem-Keizer Area Transportation Study Policy Committee (SKATS)	President Krebs Alternate: Director Busch
Oregon Metropolitan Planning Organization Consortium (OMPOC)	President Krebs Alternate: Director Busch

**Financial Impact**

None

**Recommendation**

Receive and File

**Proposed Motion**

None

Salem Area Mass Transit District  
Board of Directors

~ **WORK SESSION** ~

January 9, 2017  
Courthouse Square – Senator Hearing Room  
555 Court Street NE, Salem, Oregon 97301

**MINUTES**

<b>PRESENT:</b>	President Robert Krebs; Directors John Hammill, Kathy Lincoln, Marcia Kelley, Jerry Thompson, and Steve Evans
<b>Board</b>	
<b>Staff</b>	Allan Pollock, General Manager; David Trimble, Chief Operating Officer; Paula Dixon, Director of Administration; Patricia Feeny, Director of Communication; Wendy Feth, Accountant; Linda Galeazzi, Executive Assistant; Ben Fetherston, SAMTD Legal Counsel
<b>Guests</b>	Dale Penn, SAMTD Legislative Advocate; Bill Holmstrom, Chair, Budget Committee

**1. CALL TO ORDER** **5:30 PM**

**2. DISCUSSION**

**a. Review Draft 2017 Legislative Agenda** **5:30 PM**

**Staff report:** Pages 1-6 of the agenda

**Presented by:** Allan Pollock, General Manager  
Dale Penn, SAMTD Legislative Advocate

The Board reviewed and discussed a proposed list of projects for the federal legislative agenda on pages 1-2 as explained by Mr. Pollock. He noted that the grant requests have not changed from those submitted last year. The list includes a request for bus replacement at \$4,068,875 applied to five zero emission battery electric buses and twelve compressed natural gas (CNG) buses at \$4,560,000; construction of the second of four regional transit centers at \$2,000,000 in south Salem at Baxter and Commercial Streets; and funding for an Intelligent Transportation System at \$1,500,000. Mr. Pollock reviewed two policy issues that the District supports that will be considered in legislation to extend and make permanent the Alternative Fuels Tax Credit; and legislation that will provide northwest employees of political subdivisions who participate in voluntary employees' beneficiary association trusts with more flexibility in designating beneficiaries for their Health Retirement Accounts when they pass away.

There was brief discussion about the "Buy America" program for the purchase of electric buses. Mr. Pollock noted the two primary electric bus vendors are listed in the Buy America program. One vendor, the China-based "BYD" is in California. The other vendor

Salem Area Mass Transit District  
Board of Directors

~ WORK SESSION ~

“Proterra” is based in Greenville, South Carolina.

In the second half of the legislative report, Dale Penn reported that the State Legislative Session had begun with the swearing in of elected officials. The next two days will include training for legislative staff. The legislative period is 150 days long with legislators working toward a balanced budget by the end of the session. He noted there were 1,500 bills released today. Mr. Penn shared a handout with Governor Brown’s priorities for the State (<https://katebrownfororegon.com/priorities>).

The Board reviewed the list of projects on the District’s state legislative priority list for 2017 (on pages 4-5). The top legislative priority for the District is the continuation of the state employee bus pass program. The District’s other advocacy efforts will be focused on the transferability of the existing energy incentive tax credits obtained in 2012 and 2013 to entities who have tax liability; and a transportation funding package that will benefit small and urban transit districts as well as Oregon’s larger metro districts. The District has been asked to participate in a stakeholder work group to address inequality in Congestion Mitigation and Air Quality (CMAQ) funding going forward to ensure that the District and the Salem Keizer Area Transportation Study (SKATS) receive an equitable distribution of CMAQ funding in the year 2019 and onward. The District will monitor the ridesharing legislation that involves Uber and Lyft; and the Volkswagen automobile company settlement of several federal, state and consumer claims having to do with the installation of deceptive emissions software on their vehicles.

The Board received handouts about the Oregon Transit Association’s efforts on behalf of its member transit agencies and through the statewide coalition of supporters. Information about those efforts can be found on their websites at [www.bettertransitoregon.org](http://www.bettertransitoregon.org) and [www.gooregon.org](http://www.gooregon.org).

**b. Strategic Planning Discussion**

**6:18 PM**

**Staff report:** Pages 7-26 of the agenda

**Presented by:** Allan Pollock, General Manager

The Board received a copy of the Strategic Plan for fiscal year 2012-2017 (on pages 8-26) that provided a history of the District, and a narrative on the District’s potential future in the year 2015, 2012 and 2030 with guiding principles and goals to work toward.

Mr. Pollock advised that the Strategic Planning Subcommittee’s goal is to update the 2012-2017 Strategic Plan no later than June 2017. This plan will set the District’s course for the next 12 years. In the next few months, the Board will define what the District’s future should look like and create objectives, outcomes, and a work plan to provide guidance

Salem Area Mass Transit District  
Board of Directors

~ **WORK SESSION** ~

about what the District should look like in the next 20-30 years.

Director Kelley noted one of the inhibitors is the resources to grow the service.

President Krebs attended the Salem Chamber luncheon where there was interest shared in working together with the city, chamber and transit district regarding the expansion of the District's funding. President Krebs will attend Salem's next City Council meeting to welcome the new council members and let them know he welcomes the chance to work with them in the future. If legislation for transit funding fails, the Board can discuss revenue options with both the City of Salem and Keizer. President Krebs suggested that they share the benefits that Cherriots brings to the community.

Mr. Pollock recommended that the Board have this discussion at the Board's strategic planning session. They may want to consider bringing a work group together with partners from the hospital, non-profits, and the Mayors, etc.

Director Evans suggested they share why the service routes are planned the way they are.

Board members discussed whether to work on an update of the Strategic Plan in work sessions or plan to meet on a Saturday in a half-day session. Staff will send out a Doodle Poll to determine the Board's availability and decide on a date.

**3. GENERAL MANAGER COMMENTS**

**6:35 PM**

**Staff report:** Pages 27-30 of the agenda

**Presented by:** Allan Pollock, General Manager

The Board reviewed their calendar for upcoming meetings and events, a list of upcoming Board meeting agenda items, and the draft agenda for the Board's January 26, 2017 regular meeting on pages 29-30 where the Board will take action on the regional service changes.

Director Lincoln was provided with a map noting the frequency of services to share with constituents and help her answer any questions they might have.

Directors Thompson and Evans gave notice that they will not attend the January 26<sup>th</sup> board meeting due to other commitments.

**4. WORK SESSION ADJOURNED**

**6:40 PM**

Recorded by: Linda Galeazzi, Executive Assistant/Clerk of the Board