

**SALEM AREA MASS TRANSIT DISTRICT  
BOARD OF DIRECTORS**

**~ WORK SESSION ~**

Monday, March 11, 2019

5:30 PM

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

**AGENDA**

- 1. CALL TO ORDER** (President Bob Krebs)
- 2. "SAFETY MOMENT"**
- 3. PRESENTATION**
- 4. DISCUSSION**
  - a. Special Transportation Fund Briefing **1**
  - b. Procurement Threshold Discussion **155**
  - c. Service Enhancement Discussion – Update on the Statewide Transportation Improvement Fund Advisory Committee
- 5. GENERAL MANAGER COMMENTS**
  - a. Draft Agenda for the March 28, 2019 Regular Meeting ..... **157**
  - b. Upcoming Board Agenda Items ..... **159**
  - c. Calendar Review ..... **161**
- 6. ADJOURN**

**Mission**

Connecting people with places  
through safe, friendly, and reliable public transportation services

**Values**

Safety – Service Excellence – Communication – Innovation – Accountability

**SALEM AREA MASS TRANSIT DISTRICT  
BOARD OF DIRECTORS****~ WORK SESSION ~**

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## WORK SESSION MEMO

Agenda Item WS.4.a

**To:** Board of Directors

**From:** Ted Stonecliffe, Transit Planner II, Programs and STF Advisory Committee Coordinator

**Thru:** Allan Pollock, General Manager

**Date:** March 11, 2019

**Subject:** Coordinated Plan and STF-5310(ODOT) grant application process review

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Every two years, the Oregon Department of Transportation (ODOT) releases applications for Special Transportation Fund (STF) and federal Section 5310(ODOT) grants. As the STF Agency for Marion and Polk counties, the SAMTD Board of Directors appointed the STF Advisory Committee (STFAC) to receive, review, rank, and recommend funding for applications. Even though the majority of Board members have been through this process before, an overview of the process and the governing planning document will be provided to the Board as requested at the February 28, 2019 Board meeting.

Also, as requested by the Board, the STFAC will hold another meeting on March 12, 2019 to vote on a recommendation to bring to the March 28, 2019 Board meeting for a final decision of which grant applications to fund for the 2019-21 biennium. STF and federal Section 5310(ODOT) grant applications must be submitted to ODOT by March 29, 2019 in order to receive funds in time for the next biennium, which begins on July 1, 2019.

At tonight's work session, the Board will review the priorities and strategies identified in the Coordinated Public Transit – Human Services Transportation Plan ("Coordinated Plan"), which was adopted by the Board at their August 25, 2016 meeting. A copy of the full document is provided as **Attachment A**. This is the planning document which serves to guide funding decisions for STF and Section 5310(ODOT) projects within Marion and Polk counties.

The Board will also review the grant application process, which is documented in the instructions provided to all applicants. Copies of these application instructions are provided as **Attachment B**. The applications are provided as **Attachment C** in order to answer specific questions about each project.

The following is an outline of the timeline for the 2019-21 grant solicitation:

1. December 11, 2018 – Public Notice published in the Statesman Journal newspaper and online (statesmanjournal.com and cherriots.org)
2. December 11, 2018 – STF and 5310(ODOT) grant applications available online
3. December 18, 2018 – STF and 5310(ODOT) grant application training; open to everyone
4. January 15, 2019 at 12:00pm – Application deadline
5. January 15, 2019 – All applications sent to Technical Advisory Committee (TAC) members. They have two weeks to review the applications.
6. January 29, 2019 – TAC meeting held to hear and consider the applicant presentations and vote on a recommendation to present to the STFAC at their next meeting.
7. February 12, 2019 – STFAC meeting where TAC recommendation was considered and public testimony was heard including one testimony from Polk County and one from Cherriots General Manager Allan Pollock; STFAC voted on their recommendation to present to the SAMTD Board of Directors.
8. February 28, 2019 – SAMTD Board meeting where STFAC recommendation was presented by Committee Chair Ron Harding. The Board directed STFAC to meet again and come back to the March 28, 2019 Board meeting with a final recommendation.
9. March 12, 2019 – STFAC will meet and vote on a final recommendation to present to the Board for approval.
10. March 28, 2019 – SAMTD Board meeting to receive and take action on the final STFAC recommendation for 2019-21 STF and 5310(ODOT) grant funding.
11. March 29, 2019 – This is the due date for Cherriots staff to submit STF and 5310 (ODOT) applications to ODOT for review and consideration.
12. July 1, 2019 – Grant agreements go into effect and funding becomes available to grantees.

The following describes the grant award process as printed in the application instructions for both grants:

SAMTD, as the state-designated STF body for Marion and Polk Counties, coordinates the grant process for these funds, selects the projects, and sends copies of the agreements to ODOT RPTD for their records. A Technical Advisory Committee (TAC) made up of STF Advisory Committee (STFAC) members, two members of the public, and one representative of the Mid-Willamette Valley Council of Governments (MWVCOG) will convene at a meeting one week after the application deadline. Applicants are required to present their project ideas to the TAC in order for funding recommendations to be made to the STFAC. The

STFAC will review the TAC's recommendation and make project recommendations to the SAMTD Board.

Once the funding recommendation is approved by the SAMTD Board, staff will draft agreements with recipients and sends a courtesy copy to ODOT RPTD. Grant awards are eligible for reimbursement through June 30, 2021.

As stated in the application instructions and reiterated in the applications themselves, each project requesting STF or 5310(ODOT) funds must be identified as a need in the adopted Coordinated Plan, in order to qualify. The SAMTD Coordinated Plan outlines priorities for funding on pages 59 through 69. All of the submitted projects are identified in these pages. The following is a copy of the priorities listed:

- Maintain/improve/expand existing services, increase capacity/hours, improve service quality, and avoid service reductions, in both urban and rural areas.
- Provide for adequate capital replacements and maintenance of vehicles and other fundamental requirements to provide service.
- Consider providing non-emergency medical transportation for non- Medicaid people in rural Marion/Polk Counties
- Consider cost-effectiveness when making funding decisions (such as \$ per ride, % match), but balance that with the need to provide accessibility throughout Marion and Polk counties.
- Develop policies that identify a target for distribution of funds on strategic and equitable bases to address the needs of the region's seniors and people with disabilities.
- Implement new and innovative initiatives related to technology and collaborative partnerships to improve service to underserved communities and people.
- Enhance rider experience and sense of dignity by being sensitive and attentive to the varied needs of people and by emphasizing a customer service model.

STFAC members and applicants were all informed of the above priorities at the beginning of both the TAC and STFAC meetings. There was a question of whether these items were listed in a priority order and staff have confirmed that was the intention of the consultant during the production of the document.





# COORDINATED PUBLIC TRANSIT—HUMAN SERVICES TRANSPORTATION PLAN

Cherriots  
August 2016

Prepared for:

**Cherriots**  
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**KITTELSON & ASSOCIATES, INC.**  
TRANSPORTATION ENGINEERING/PLANNING

MOVING **FORWARD** THINKING™





# Coordinated Public Transit – Human Services Transportation Plan

Cherriots

Prepared For:

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Project No. 18932

August 2016



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Appendix F: Mobility Management Work Plan

Appendix G: Survey Results Matrix







Chapter 1  
Introduction

## INTRODUCTION

This document is intended to serve as the Coordinated Transportation Plan (Coordinated Plan) for Marion and Polk Counties, and is prepared on behalf of Cherriots. In general, this document will refer to Cherriots as Salem-Keizer Transit (SKT), but the two names refer to the same organization. The Coordinated Plan is a guiding document for SKT’s Board of Directors including their Special Transportation Fund Advisory Committee (STFAC) that makes recommendations about grant distributions funded by the State of Oregon’s Special Transportation Fund (STF) and Section 5310 (§5310) funds to improve transportation programs and services for seniors and people with disabilities. This document builds on the 2007 Specialized Transportation Plan for Marion and Polk Counties and the subsequent 2009 Coordinated Transportation Plan. The 2007 Specialized Transportation Plan examined the ways special needs transportation services are delivered in the two counties, and recommended improvements to better coordinate services. The 2009 Coordinated Plan updated the Specialized Transportation Plan to meet federal and state planning guidelines.

Since the development of the 2009 Coordinated Plan, SKT has made advances in public transportation services and implemented new programs, such as the West Salem Connector. As the population of senior and people with disabilities continues to grow, the region will continue to focus on developing an innovative continuum of transportation services, one that takes in to account people’s abilities throughout life. New sources of funding will be needed and coordination of services and service providers will be essential to providing the most access to transportation for seniors and people with disabilities as possible with limited funds.

## LOOKING FORWARD

Transportation is a key determinant of health. The World Health Organization has developed a “Checklist of Essential Features of Age-friendly Cities” (2007) as a tool for a city’s assessment and map for charting progress. All of the data indicates that 80 to 90 percent of people want to stay in their home as long as possible. One of the key elements of a Livable Community is adequate transportation to access medical care and other essential services.

Decisions we make today on how best to invest in transportation options for seniors and people with disabilities will affect the future quality of life for thousands of Marion and Polk County residents. By 2025, there is expected to be approximately 34,000 more people 65 years and older in the two-county area, growing from a 13.2



percent share of the population today to a 17.9 percent share. According to the 2010 US Census, over 14 percent of the two-county population reported a disability.

Seniors will represent the fastest growing segment of population in years to come, far outpacing the rate of population growth. As Marion and Polk Counties are projected to become proportionally older, many seniors are likely to become disabled due to physical frailty caused by the effects of aging. Existing resources are inadequate to meet the growing demand for services for these populations. These changing demographics challenge the conventional solutions of more buses and paratransit vans. While such traditional modes of transportation will surely be needed, there is a limit to how much SKT can afford. Improved coordination among existing services, innovative collaboration to deliver new types of services and a regional commitment to placing public facilities and social services at locations served by public transit will also be needed.

## SALEM-KEIZER TRANSIT'S 2016 COORDINATED PLAN

The Oregon Department of Transportation (ODOT) serves as the designated recipient for Section 5310 funds. As the designated recipient of these funds, ODOT is required to conduct a competitive selection process to determine use of the funds, and to certify that projects were derived from a Coordinated Plan. These requirements come from a Federal Transit Administration (FTA) administrative rule. ODOT also administers Oregon's STF. An Oregon administrative rule requires that STF Agencies (the counties, transportation districts, and Native American tribes designated by state law to receive the STF monies) prepare a plan to guide the investment of STF monies to maximize the benefit to seniors and people with disabilities within their jurisdictions. ODOT has delegated authority to SKT as the governing body to determine how STF and 5310 dollars are spent in the rural and urban areas of Marion and Polk Counties. This Coordinated Plan is used for the FTA-direct §5310 grant, the ODOT pass-through §5310 grant, and any STF grant funds; and to coordinate transportation services with human service organizations that receive funding from the Oregon Department of Human Services (DHS).

In addition to the Section 5310 funds received from ODOT, Salem-Keizer Transit is the designated, direct recipient of FTA Section 5310 funds because the Salem-Keizer urbanized area (UZA) population exceeds 200,000 people. SKT's Program Management Plan (PMP) describes the policies and procedures for administering an Enhanced Mobility of Seniors and People with Disabilities program. The PMP articulates a vision for SKT's future with programs that focus on the maintenance of critical services, while strategically developing opportunities for the growth of services and facilities for the years to come. In this regard, the PMP aligns with the



Coordinated Plan by identifying the growing need for public transportation in the Salem-Keizer area, especially to provide transportation for seniors and people with disabilities where public transportation is insufficient, inappropriate, or unavailable.

Successful implementation of the Coordinated Plan and the PMP will depend upon good planning, leadership, state and federal funding support, and additional local revenues. SKT recognizes that this will only come with strong involvement and support from the people and businesses in the community. In combination with the PMP, the Coordinated Plan is intended to be a resource for all potential recipients of Section 5310 funds as well as local, state, and federal agencies amongst which coordination of programs is essential in meeting the region's transportation needs.

The 2016 update to the Coordinated Plan builds upon the foundation of the 2009 Coordinated Plan, which captured SKT's ability to provide transportation services that consider people's functional abilities as they transition through various stages of age and ability. The 2016 update coincides with ODOT's upcoming grant application process, with new grants to be awarded in the spring of 2017. Strategies of particular interest for this update focused on maintaining existing services, expanding service, coordinating with social service providers to increase system efficiencies, and working to implement strategies that increase access to lifeline services. It is recommended to use Salem-Keizer Transit's existing decision-making and planning functions to help implement the strategies laid out in the Coordinated Plan.

The Coordinated Plan is divided into seven chapters, as outlined below:

- Chapter 1 introduces the Coordinated Plan process.
- Chapter 2 describes the plan background and methodology, and provides a description of the relevant grant programs.
- Chapter 3 presents a demographic profile of Marion and Polk Counties.
- Chapter 4 is a list of transit providers and human service agencies that operate in Marion and Polk Counties and in adjacent area.
- Chapter 5 provides a summary of the transit provider and human service agency outreach survey and four stakeholder workshops to identify the transportation needs specific to seniors and people with disabilities.
- Chapter 6 presents a set of prioritized strategies for SKT and the regional social-service providers to implement in order to improve the delivery of transportation services.
- Chapter 7 maps the applicable strategies from Chapter 6 to the transportation needs described in Chapter 5, and provides a set of next steps toward plan implementation.

## Chapter 2 Background and Methodology





## BACKGROUND AND METHODOLOGY

The Coordinated Transportation Plan was developed under the guidance and oversight of Salem-Keizer Transit (SKT), SKT’s Board of Directors, and the Oregon Department of Transportation (ODOT), who are knowledgeable about the transportation needs of seniors and people with disabilities in Marion and Polk Counties. The SKT Board has a Special Transportation Fund Advisory Committee (STFAC) that makes recommendations about formula and discretionary grant distributions funded by the State of Oregon’s STF funds and federal §5310 funds to improve transportation programs and services for seniors and people with disabilities. The STFAC was initially set up under a mandate from ODOT which administers Oregon’s STF. The STFAC is appointed by the Board and is made up of seniors, people with disabilities, and members of the public interested in improving transportation for these groups. STFAC convenes monthly to advise SKT’s Board of Directors in making recommendations, all of which are focused on meeting transportation needs of seniors and/or people with disabilities. The STFAC also receives and makes recommendations on the funding applications for Section 5310 projects every two years. All STFAC meetings are open to the public, formally noticed by SKT, and accessible by Americans with Disabilities Act (ADA) standards.

Beginning in late 2015 and continuing through 2016, SKT and ODOT worked together to update the Coordinated Transportation Plan for seniors and people with disabilities. The following steps were taken to develop the key findings included in this Plan Update:

- A survey was distributed to transit service providers and social service providers to learn more about the perceived needs and gaps, potential coordination opportunities and what types of services, programs or advances in technology could help address service gaps or offer new and innovative services. In addition, transit service providers provided fleet vehicle information.
- Providers were contacted to ensure their program information is accurate and up-to-date;
- Four stakeholder workshops were convened to (1) discuss the transportation needs, gaps and challenges specific to seniors and people with disabilities; (2) Identify geographic, regulatory and structural barriers to addressing these needs; and (3) share ideas for new and innovative services. Workshop invitees included transportation providers, community

organizations, senior centers and human and health service agencies, representing a diverse group of services and geographies. *A summary of the stakeholder workshop can be seen in **Appendix A**. A list of comments made by participants may be found in **Appendix B**.*

The Coordinated Plan fulfills the planning requirements of the State’s STF administrative rules and the federal requirement for a coordinated transportation plan. The federal Fixing America’s Surface Transportation (FAST) Act requires that transportation providers and human service agencies plan jointly in order to be eligible for Enhanced Mobility of Seniors and Individuals with Disabilities Program (§5310), Formula Grants for Rural Areas (§5311), Public Transportation Innovation (§5312), and other sources of federal funds. Federal guidance specifies four required elements of a coordinated plan, as follows:

- An assessment of available services that identifies current transportation providers (public, private, and non-profit).
- An assessment of transportation needs for people with disabilities, seniors, and people with low incomes. This assessment can be based on the experiences and perceptions of the planning partners or on more sophisticated data collection efforts, and gaps in service.
- Strategies, activities, and/or projects to address the identified gaps between current services and needs, as well as opportunities to achieve efficiencies in service delivery.
- Priorities for implementation based on resources (from multiple program sources), time, and feasibility for implementing specific strategies and/or activities.

## OVERVIEW OF RELEVANT GRANT PROGRAMS

The STFAC reviews applications and makes funding recommendations to the SKT Board of Directors for the following two grant programs.

### Section 5310 Federal Funds

The 49 U.S.C 5310 program (§5310) provides formula funding to states and metropolitan regions for the purpose of meeting the transportation needs of seniors and people with disabilities. Funds are apportioned based on each state’s share of the population for these two groups. The purpose of the program is to improve mobility for seniors and people with disabilities by removing barriers to transportation service and expanding transportation mobility options. Eligible



projects include both “traditional” capital investment and “nontraditional” investment beyond the Americans with Disabilities Act (ADA) complementary paratransit services.

On August 10, 2005, President Bush signed into law the Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users, commonly referred to as SAFETEA-LU. SAFETEA-LU authorized funding for federal surface transportation programs over six years through Fiscal Year 2009. Starting in Fiscal Year 2007, projects funded through three programs included in SAFETEA-LU and administered by the Federal Transit Administration (FTA), including the Job Access and Reverse Commute Program (JARC, Section 5316), New Freedom (Section 5317) and the Formula Program for Elderly Individuals and Individuals with Disabilities (Section 5310) are required to be derived from a locally developed, coordinated transportation plan. These three funding programs focus on the needs of transportation disadvantaged people or those with special transportation needs that cannot be met through traditional means (access to automobile or public transportation).

On July 6, 2012, President Obama signed into law the Moving Ahead for Progress in the 21st Century Act, referred to as MAP-21. This transportation bill merged the New Freedom program (49 U.S.C. 5317) into the Section 5310 program. As a result, activities that were eligible under the New Freedom program, including operating expenses, were eligible under Section 5310. Consistent with Section 5317, funds were apportioned among large urbanized areas, small urbanized areas, and rural areas instead of only to states. In addition, MAP-21 merged the Job Access and Reverse Commute (JARC) program with Section 5307 funds.

The current Federal Transportation Bill, also known as the Fixing America's Surface Transportation (FAST) Act, replaced MAP-21. Under the FAST Act, JARC activities are eligible under Section 5307.

Traditional Section 5310 project examples include:

- Purchasing buses and vans for providing service to seniors and/or people with disabilities
- Wheelchair lifts, ramps, and securement devices for such vehicles
- Transit-related information technology systems, including scheduling/routing/one-call systems
- Mobility management programs

- Acquisition of transportation services for seniors and/or people with disabilities under a contract, lease, or other arrangement

Nontraditional Section 5310 project examples include:

- Travel training to help seniors and/or people with disabilities make transit trips on fixed-route where they have more convenience in choosing when to travel and more independence
- Volunteer driver programs
- Building an accessible path to a bus stop, including curb-cuts, sidewalks, accessible pedestrian signals or other accessible features
- Improving signage, or way-finding technology
- Incremental cost of providing same day service or door-to-door service (compared to curb-to-curb with 24 hours notice)
- Purchasing vehicles to support new accessible taxi, rides sharing and/or vanpooling programs
- Mobility management programs

The federal share of eligible capital costs may not exceed 80 percent. The federal share of eligible operating cost assistance may not exceed 50 percent.

### State Special Transportation Funds (STF)

The STF was created in 1985 by the Oregon Legislature. This is allocated by the Oregon Legislature every two years to 42 jurisdictions around the state including Salem-Keizer Transit. It is funded by cigarette tax revenue, excess revenue earned from sales of photo ID Cards, and other funds from the Oregon Department of Transportation. The STF Program provides a flexible, coordinated, reliable and continuing source of revenue in support of transportation services for seniors and people with disabilities of any age. The Oregon Legislature intended that STF funds be used to provide transportation services needed to access health, education, work, and social/recreational opportunities so that seniors and people with disabilities may live as independently and productively as possible. The funds may be used for any purpose directly related to transportation services, including transit operations, capital equipment, planning, travel training and other transit-related purposes.

### SKT'S ROLE AS THE SPECIAL TRANSPORTATION FUND AGENCY

SKT is the federally-designated agency to disburse FTA's 49 U.S.C. 5310 (§5310) Enhanced Mobility of Seniors and Individuals with Disabilities funds within the Salem-



Keizer urban growth boundary for Marion and Polk counties. SKT administers the §5310 program and coordinates with other providers in the region to ensure coordinated, effective provision of service that meets federal and state requirements. SKT also receives funds through ODOT’s §5310 program for urban and rural projects in Marion and Polk Counties. Salem-Keizer Transit has chosen many components of the STF grant selection and award process for the FTA-direct Section 5310 grant process.

SKT is also the designated “STF Agency” to receive and distribute STF funds from the State of Oregon for Marion and Polk Counties. Both of these sources of funds are focused on supporting transit service for seniors and people with disabilities. STF makes a further distinction that the funds can be used to support low-income people, many whom are also seniors and people with disabilities. In addition, SKT acts as the pass-through agency for §5310 dollars distributed by ODOT to non-profit agencies in Marion and Polk Counties.

SKT develops a Coordinated Plan and updates the plan at least every four years to meet the FTA’s requirement that projects selected for funding under the §5310 program be included in such plans. Federal law requires these plans to be "developed and approved through a process that included participation by seniors, people with disabilities, representatives of public, private, and nonprofit transportation and human services providers and other members of the public." SKT develops the Coordinated Plan in coordination with members of the public as well as with many stakeholders, public and private, many whom engage in the STFAC Advisory Committee’s process for project solicitation, selection, and award.

#### SKT Board of Directors

The SKT Board of Directors works with the STFAC to make informed decisions about transportation for seniors and people with disabilities. The SKT Board of Directors receives STFAC recommendations and has final authority for setting and approving funding levels to endorse federal §5310 and STF funds disbursement in the two-county region. This action also authorizes the SKT General Manager to enter into funding agreements with transportation providers.





## Chapter 3 Demographic Profile



## DEMOGRAPHIC PROFILE

This chapter provides an overview of Marion and Polk Counties based on data from the 2010 United States Census and the 2010-2014 American Community Survey 5-year estimate dataset. This chapter of the Coordinated Plan contains maps, created using Geographic Information System (GIS) technology, that illustrate the location and density of people aged 60 years and over, people with disabilities, and low-income people within Marion and Polk Counties. These maps are useful by visually depicting geographic areas with concentrations of the population groups that face particular mobility concerns, and that are the subject of this plan. SKT generally uses the 60 years and over data to determine eligibility for reduced fares and whether they can ride the RED Line, for example. SKT’s definition of a senior citizen for eligibility for reduced fares is 60 years and over, the federal definition is 65 years and over, specific to the 5310 grant program. Because the Coordinated Plan is used for both Oregon and federal grants, both age groups need to be documented. *Information on seniors 65 years and over may be found in **Appendix C**.*

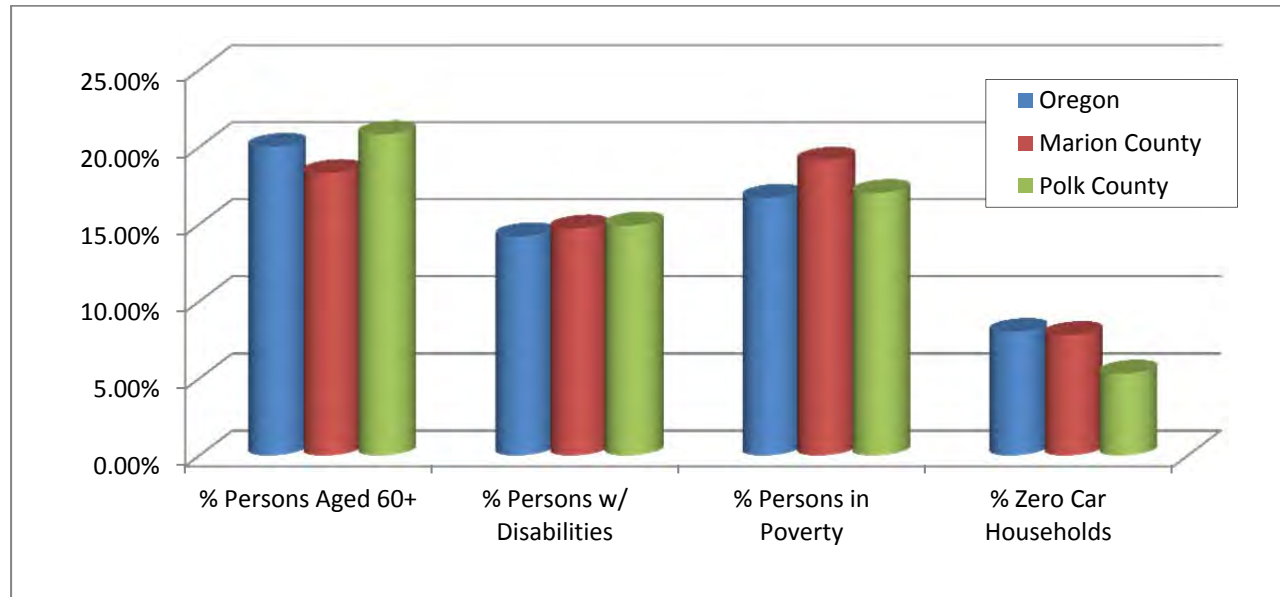
**Table 1** (and **Figure 1** on the following page) provides a “snapshot” of three population groups of concern for the Coordinated Plan: older adults, people with disabilities, and low-income people (as defined by the federal definition).

**Table 1. Population Characteristics**

	Total Population <sup>1</sup>	% People Aged 60+ <sup>1</sup>	% People w/ Disabilities <sup>2,3</sup>	% Low-Income People <sup>4</sup>	% Zero Car Households <sup>3,5</sup>
Oregon	3,831,074	20.0%	14.2%	16.7%	8.0%
Marion County	315,335	18.3%	14.7%	19.1%	7.8%
Polk County	75,403	20.8%	14.9%	17.0%	5.3%

(1) U.S. Census, 2010, Table DP-1. (2) As percent of the total civilian noninstitutionalized population, Table S1810. (3) ACS 2010-2014 estimate. (4) As percent of people for which poverty status is determined, Table S1701. (5) Table B08201.

**Figure 1. Population Characteristics**



Source: U.S. Census, 2010, Table DP-1. As percent of the total civilian noninstitutionalized population, Table S1810. As percent of people for which poverty status is determined, Table S1701. ACS 2010-2014 estimate.

**Table 2** presents an overview of the population of cities within Marion and Polk Counties. The distribution of the total population in both counties is shown on a map in **Figure 2**.

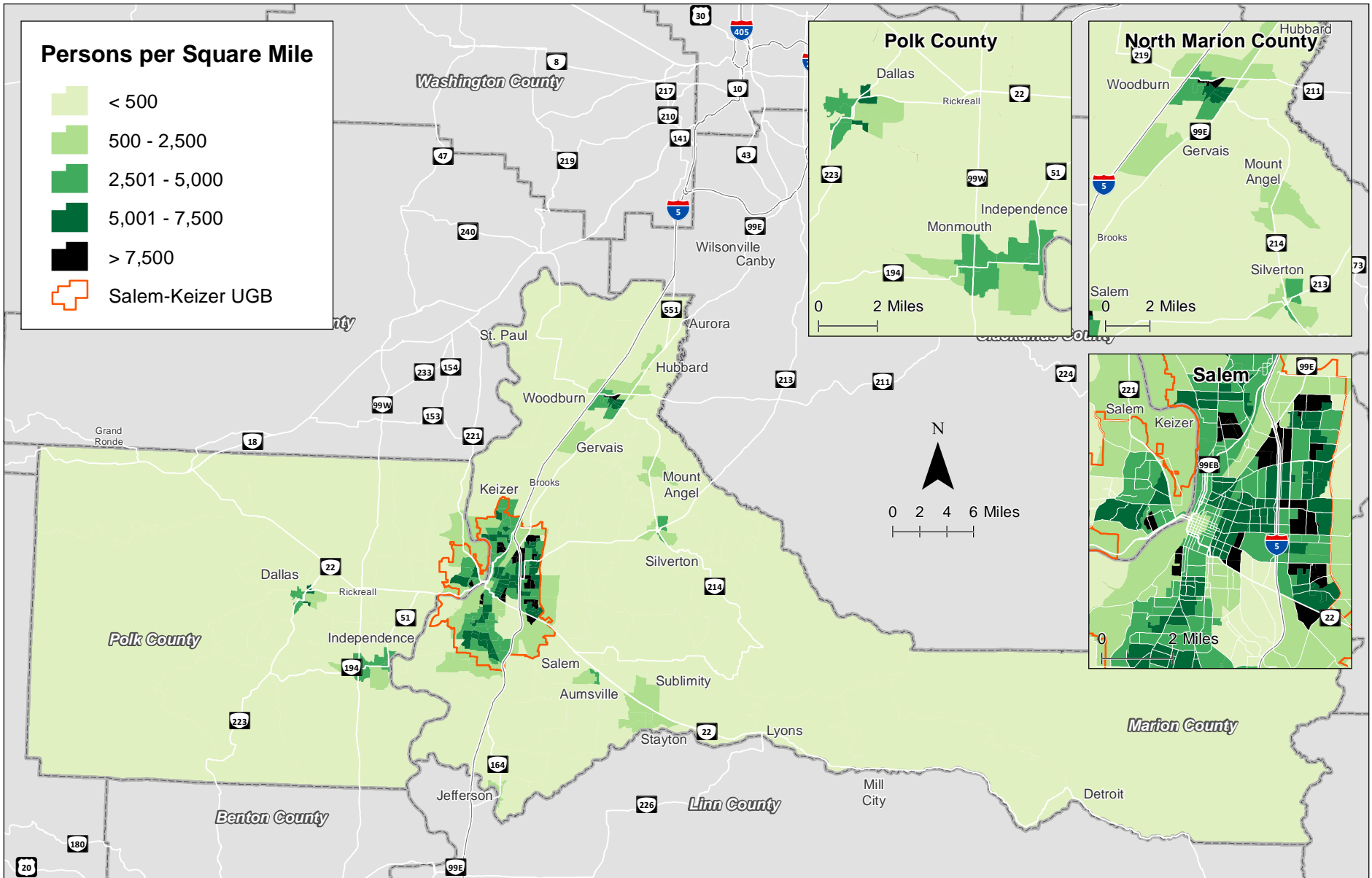
**Table 2. Population by City**

City	County	2010 Population <sup>1</sup>
Salem	Marion	154,637
Keizer	Marion	36,478
Woodburn	Marion	24,080
Hayesville <sup>2</sup>	Marion	19,936
Four Corners <sup>2</sup>	Marion	15,947
Dallas	Polk	14,583
Monmouth	Polk	9,534
Silverton	Marion	9,222
Independence	Polk	8,590
Stayton	Marion	7,644
Aumsville	Marion	3,584
Mount Angel	Marion	3,286
Hubbard	Marion	3,173
Jefferson	Marion	3,098
Sublimity	Marion	2,681
Gervais	Marion	2,464
Willamina <sup>3</sup>	Polk/Yamhill	2,025
Mill City <sup>3</sup>	Linn/Marion	1,855
Turner	Marion	1,854
Donald	Marion	961
Falls City	Polk	947
Aurora	Marion	918
Gates	Marion	471
St. Paul	Marion	420
Scotts Mills	Marion	357
Detroit	Marion	202
Idanha	Marion	134

(1) U.S. Census, 2010, Table DP-1. (2) This unincorporated area of Marion County lies within the Salem-Keizer Urban Growth Boundary. (3) This city is not entirely within Marion and Polk counties.



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**Population Density in Marion and Polk Counties  
(by Census Block Group)**

**Figure  
2**

## Older Adults

**Figure 3** provides a population density map of people aged 60 and older in Marion and Polk counties. It shows that high concentrations of seniors are in the Salem-Keizer area, where the population is denser in general. Outside of the Salem area, the largest concentrations of seniors are in Dallas and Woodburn. **Table 3** lists the percentage of the population aged 60 and older for individual cities in each county. Cities where the share of older adults is greater than the counties as a whole are shown in bold.

**Table 3. Adults Aged 60+ by City**

City	2010 Population Age 60+ <sup>1</sup>	% Age 60+
Salem	26,480	17.2%
<b>Keizer</b>	<b>6,880</b>	<b>18.9%</b>
<b>Woodburn</b>	<b>4,730</b>	<b>19.6%</b>
<b>Dallas</b>	<b>3,650</b>	<b>25.0%</b>
Hayesville <sup>2</sup>	3,090	15.5%
Four Corners <sup>2</sup>	2,560	16.1%
<b>Silverton</b>	<b>1,830</b>	<b>20.0%</b>
Stayton	1,400	18.3%
Monmouth	1,220	12.8%
Independence	1,120	13.1%
<b>Sublimity</b>	<b>930</b>	<b>34.6%</b>
<b>Mount Angel</b>	<b>820</b>	<b>25.0%</b>
Aumsville	440	12.2%
Jefferson	440	14.0%

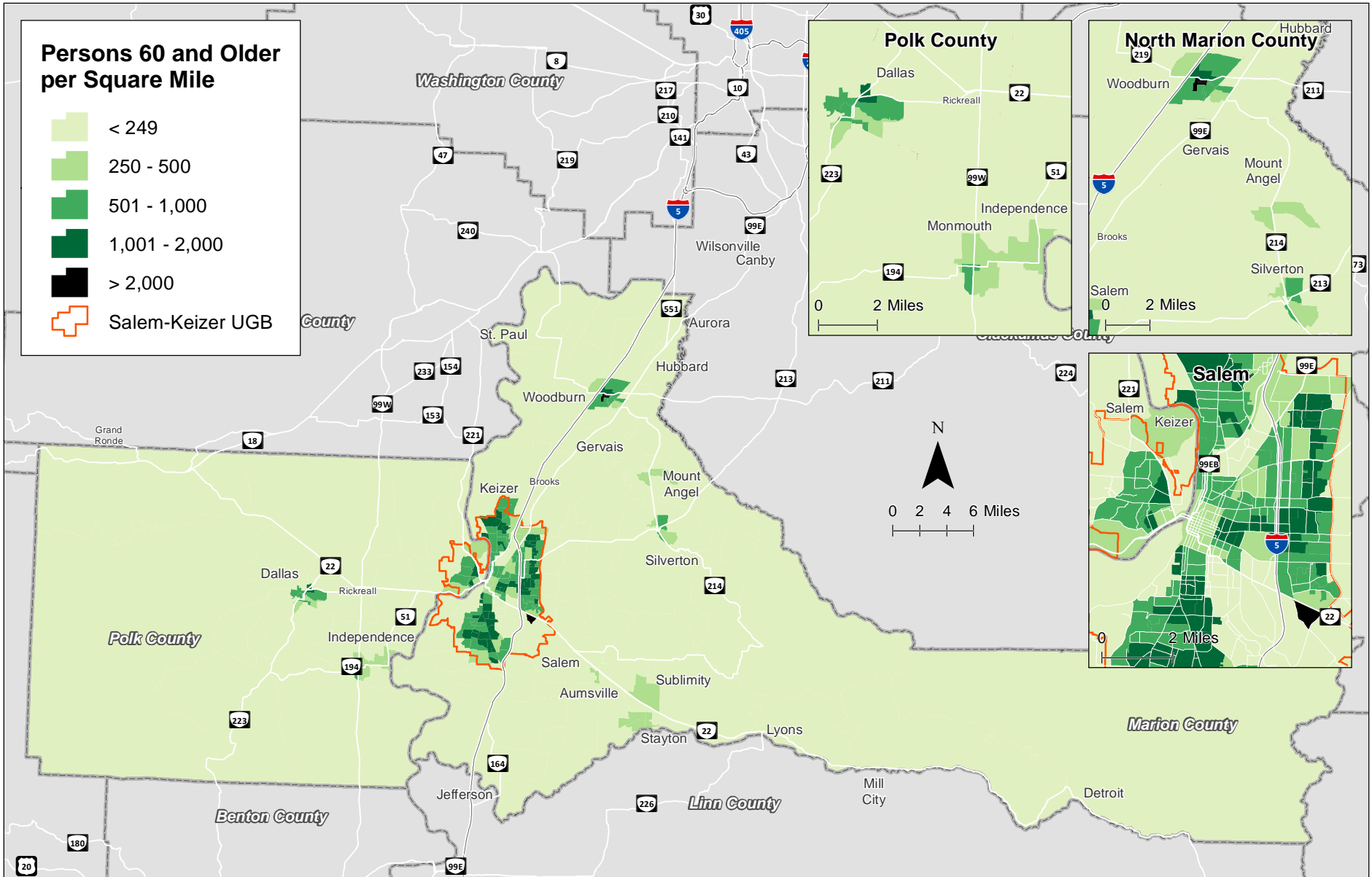
City	2010 Population Age 60+ <sup>1</sup>	% Age 60+
<b>Turner</b>	<b>420</b>	<b>22.7%</b>
<b>Mill City</b> <sup>3</sup>	<b>340</b>	<b>18.5%</b>
Willamina <sup>3</sup>	320	15.7%
Hubbard	300	9.3%
<b>Falls City</b>	<b>220</b>	<b>23.2%</b>
<b>Aurora</b>	<b>180</b>	<b>19.2%</b>
Donald	150	15.6%
Gervais	150	6.0%
<b>Gates</b>	<b>140</b>	<b>30.6%</b>
St. Paul	70	17.2%
Scotts Mills	60	17.3%
<b>Detroit</b>	<b>60</b>	<b>29.3%</b>
<b>Idanha</b>	<b>30</b>	<b>24.5%</b>

(1) U.S. Census, 2010, Table DP-1. (2) This unincorporated area of Marion County lies within the Salem-Keizer Urban Growth Boundary. (3) This city is not entirely within Marion and Polk counties.

Cities where the share of people aged 60 or older is greater than the counties as a whole are shown in bold.



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**Population Density of People Aged 60 Years and Older (by Census Block Group)**

**Figure 3**

## People with Disabilities

In the state of Oregon nearly 14 percent of the population reported a disability in 2010. The disability rates in Marion and Polk Counties are slightly higher than the state as a whole.

The definition of “disability” varies in different population surveys; for this project, information cited is consistent with definitions reported in the 2014 U.S. Census Bureau’s American Community Survey (ACS). The questions regarding disability on the 2014 American Community Survey remain unchanged from the 2008 ACS and include three questions with a total of six subparts with which to identify people with disabilities.<sup>1</sup> The questions are as follows:

- 16a. Is this person deaf or does he/she have serious difficulty breathing? (yes/no)
- 16b. Is this person blind or does he/she have serious difficulty seeing even when wearing glasses? (yes/no)
- 17a. Because of a physical, mental, or emotional condition, does this person have serious difficulty concentrating, remembering, or making decisions? (yes/no)
- 17b. Does this person have serious difficulty walking or climbing stairs? (yes/no)
- 17c. Does this person have difficulty dressing or bathing? (yes/no)
- 18. Because of a physical, mental, or emotional condition, does this person have difficulty doing errands alone such as visiting a doctor’s office or shopping? (yes/no)

This definition differs from that used to determine eligibility for paratransit services required by the Americans with Disabilities Act (ADA). To qualify for ADA paratransit services, an individual’s disability must prevent them from independently being able to use the fixed-route transit service, even if the vehicle itself is accessible to people with disabilities (i.e. lift- or ramp-equipped). The difference between the two definitions is important because not all people who are defined as disabled according to the ACS definition qualify for ADA paratransit services.

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<sup>1</sup> [https://www.census.gov/people/disability/files/2008ACS\\_disability.pdf](https://www.census.gov/people/disability/files/2008ACS_disability.pdf), page 3



**Figure 4** on the following page shows a map of population density of disabled people in Marion and Polk Counties. **Table 4** lists the percentages of the population with a disability for communities in each county.

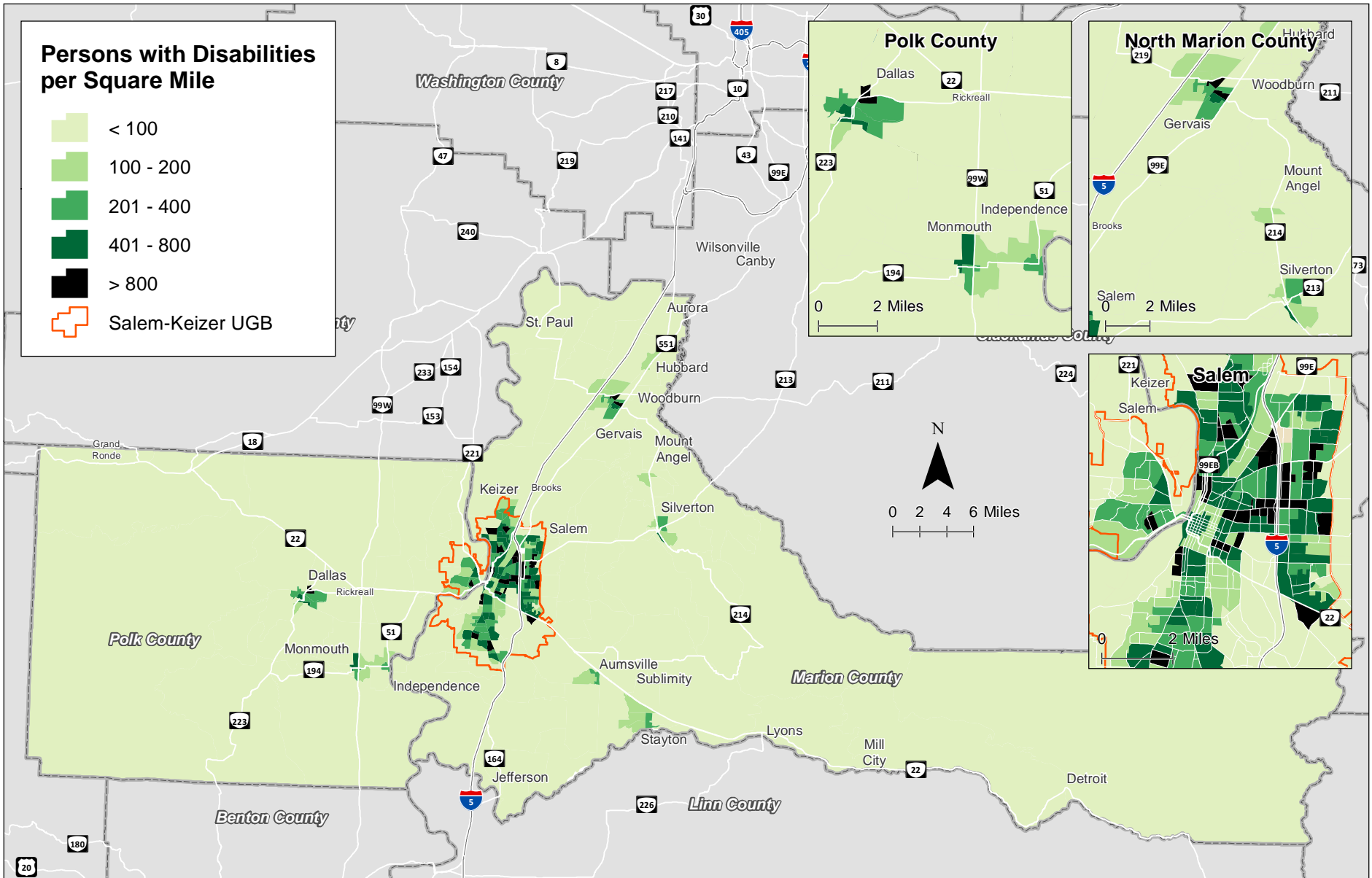
**Table 4. People with Disabilities by City**

City	Population with Disabilities <sup>1</sup>	% People w/ Disabilities
Salem	22,300	14.6%
<b>Keizer</b>	<b>5,650</b>	<b>15.4%</b>
Woodburn	3,070	12.8%
<b>Hayesville<sup>2</sup></b>	<b>2,840</b>	<b>15.3%</b>
<b>Dallas</b>	<b>2,720</b>	<b>18.6%</b>
<b>Four Corners<sup>2</sup></b>	<b>2,590</b>	<b>15.1%</b>
Silverton	1,320	14.2%
<b>Stayton</b>	<b>1,200</b>	<b>15.6%</b>
Monmouth	1,100	11.3%
Independence	1,010	11.7%
<b>Aumsville</b>	<b>730</b>	<b>19.7%</b>
<b>Mount Angel</b>	<b>660</b>	<b>20.0%</b>
<b>Sublimity</b>	<b>540</b>	<b>20.6%</b>
<b>Jefferson</b>	<b>540</b>	<b>17.0%</b>

City	Population with Disabilities <sup>1</sup>	% People w/ Disabilities
<b>Willamina<sup>3</sup></b>	<b>430</b>	<b>24.5%</b>
<b>Turner</b>	<b>390</b>	<b>17.3%</b>
Hubbard	360	11.3%
<b>Mill City<sup>3</sup></b>	<b>340</b>	<b>20.4%</b>
Gervais	290	11.6%
<b>Falls City</b>	<b>290</b>	<b>32.2%</b>
<b>Gates</b>	<b>150</b>	<b>25.2%</b>
Donald	80	7.8%
Aurora	70	7.1%
<b>Idanha</b>	<b>50</b>	<b>32.4%</b>
Scotts Mills	40	8.3%
<b>Detroit</b>	<b>40</b>	<b>27.2%</b>
St. Paul	30	9.1%

(1) As percent of the total civilian noninstitutionalized population, Table S1810, ACS 2010-2014 estimate. (2) This unincorporated area of Marion County lies within the Salem-Keizer Urban Growth Boundary. (3) This city is not entirely within Marion and Polk counties. Cities where the share of people with a disability is greater than the counties as a whole are shown in bold.

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Population Density of Persons with Disabilities (by Census Block Group)

Figure 4

## Income Status

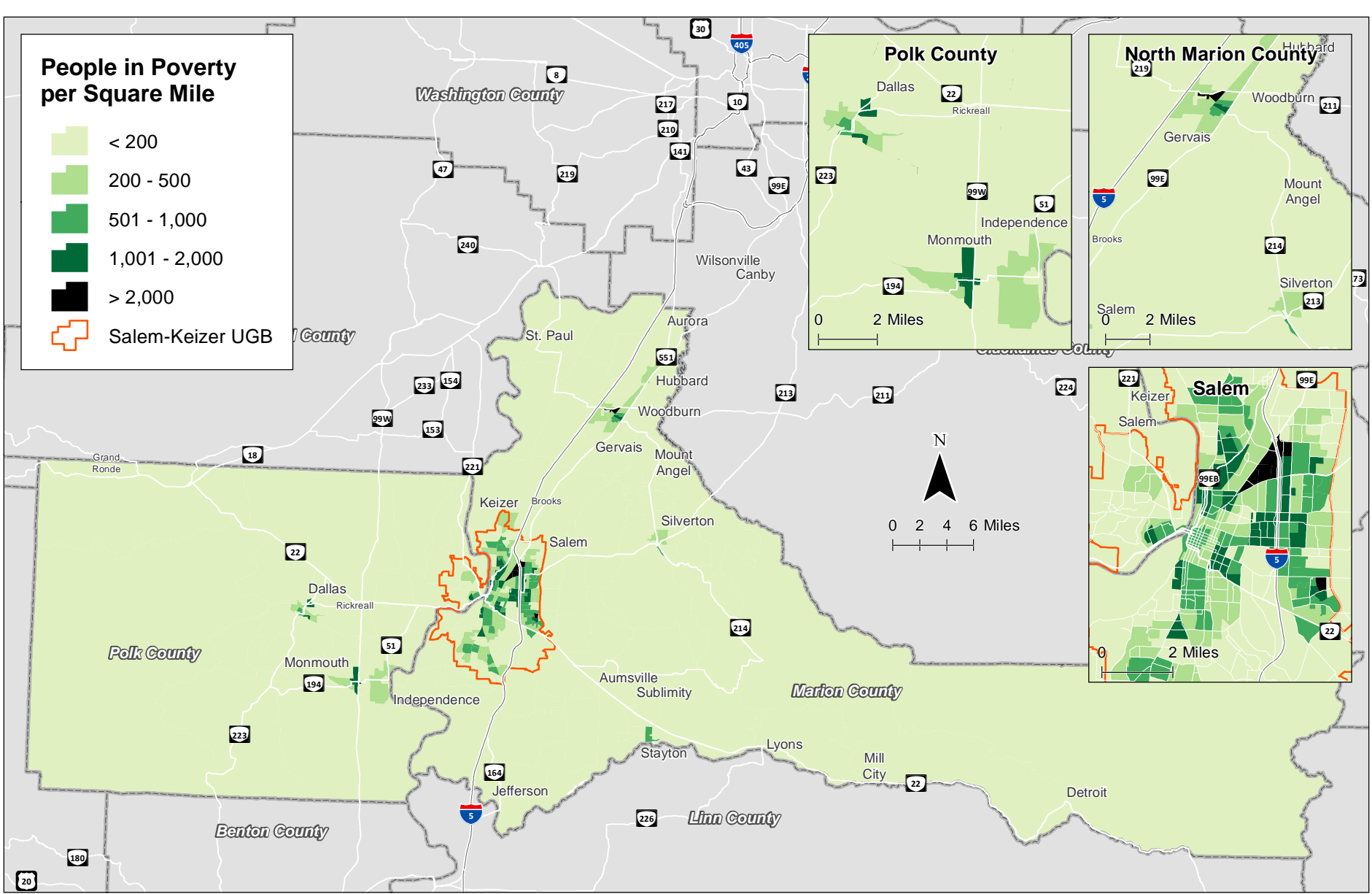
In Marion County an average of 19.1 percent of residents (compared with a statewide average of 16.7 percent) live below the applicable federal poverty threshold, which for a family of four is defined as a household income under \$23,850. In Polk County, 17.0 percent of residents live below the poverty threshold, about the same as the statewide average. The map shown in **Figure 5** on the following page illustrates the portions of Polk and Marion Counties with the highest percentage of low-income people. **Table 5** lists the percentages of low-income people for individual cities in each county. Cities where the share of low-income people is greater than the county as a whole are shown in bold.

**Table 5. Low-Income People by City**

City	# Low-Income People <sup>1,2</sup>	% Low-Income People <sup>1,2</sup>	City	# Low-Income People <sup>1,2</sup>	% Low-Income People <sup>1,2</sup>
<b>Salem</b>	<b>28,850</b>	<b>19.2%</b>	<b>Willamina<sup>4</sup></b>	<b>440</b>	<b>25.3%</b>
<b>Woodburn</b>	<b>6,570</b>	<b>27.4%</b>	Mount Angel	380	11.5%
Keizer	5,680	15.6%	Turner	300	13.1%
<b>Hayesville<sup>3</sup></b>	<b>4,370</b>	<b>23.7%</b>	Sublimity	280	10.7%
<b>Four Corners<sup>3</sup></b>	<b>3,900</b>	<b>22.9%</b>	Mill City <sup>4</sup>	270	16.5%
<b>Independence</b>	<b>2,830</b>	<b>32.8%</b>	<b>Falls City</b>	<b>210</b>	<b>23.5%</b>
Dallas	2,760	19.0%	Gates	110	18.3%
<b>Monmouth</b>	<b>2,420</b>	<b>28.3%</b>	Aurora	100	10.3%
<b>Stayton</b>	<b>1,680</b>	<b>21.8%</b>	<b>Scotts Mills</b>	<b>90</b>	<b>19.3%</b>
Silverton	1,510	16.2%	Donald	80	8.0%
<b>Jefferson</b>	<b>700</b>	<b>22.5%</b>	<b>Idanha</b>	<b>40</b>	<b>29.0%</b>
<b>Hubbard</b>	<b>620</b>	<b>19.4%</b>	St. Paul	20	5.5%
<b>Gervais</b>	<b>580</b>	<b>23.1%</b>	Detroit	5	2.6%
Aumsville	480	12.9%			

(1) As percent of people for which poverty status is determined, Table S1701. (2) ACS 2010-2014 estimate. (3) This unincorporated area of Marion County lies within the Salem-Keizer Urban Growth Boundary. (4) This city is not entirely within Marion and Polk counties. Cities where the share of low-income people is greater than the counties as a whole are shown in bold.

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Density of People Living in Poverty (by Census Block Group)

Figure 5

## Vehicle Ownership

Vehicle ownership and/or access is an indicator of mobility, as a vehicle is a necessity in most rural communities due to limited or no public transportation. Just fewer than eight percent of households in Marion County and approximately five percent of households in Polk County do not have access to a vehicle, which are slightly lower than the statewide average of eight percent. **Table 6** shows the number of zero-car households in Marion and Polk counties. Without a private vehicle, residents can make trips by taking transit, walking, biking, carpooling/car-sharing, or utilizing taxi services.

**Table 6. Number of Zero-Vehicles Households by City**

City	# Zero-Vehicle Households <sup>1,2</sup>	City	# Zero-Vehicle Households <sup>1,2</sup>
Salem	5,330	Hubbard	40
Keizer	900	Aumsville	30
Woodburn	690	Willamina <sup>3</sup>	30
Hayesville <sup>2</sup>	530	Mill City <sup>3</sup>	20
Four Corners <sup>2</sup>	450	Falls City	20
Dallas	390	Gates	10
Stayton	320	Gervais	10
Monmouth	210	Aurora	5
Sublimity	200	Donald	5
Silverton	160	St. Paul	5
Independence	160	Scotts Mills	5
Mount Angel	130	Idanha	5
Turner	60	Detroit	0
Jefferson	40		

(1) Table B08201 (2) ACS 2010-2014 estimate. (2) This unincorporated area of Marion County lies within the Salem-Keizer Urban Growth Boundary. (3) This city is not entirely within Marion and Polk counties.

## Population Trends

Between 2010 and 2025, the overall population growth in Marion County (21 percent) and Polk County (28 percent) is expected to outpace population growth for the state as a whole (18 percent). The data is shown in **Table 7**, from population estimates provided by State of Oregon Department of Administrative Services' Office of Economic Analysis. Between 2010 and 2025, the rate of population increase for adults 65 years and older in Marion County (65 percent) and Polk County (68 percent) is expected to be slower than the state as a whole (73 percent).



As in other parts of the country and in Oregon, it is estimated that Marion and Polk Counties will experience a dramatic increase in the number of adults aged 65 and older over the next decade. The increase in the population of seniors will increase the demand for coordinated transportation services that meet the needs of this population.

**Table 7. Population Growth Forecasts**

	Total Population in 2010 <sup>1</sup>	Total Population Forecast 2025 <sup>2</sup>	Population Change % (2010-2025)	Total People Aged 65+ in 2010 <sup>1</sup>	Total People Aged 65+ Forecast in 2025 <sup>2</sup>	65+ Population Change % (2010-2025)
Oregon	3,831,074	4,516,200	17.9%	533,533	921,012	72.6%
Marion County	315,335	381,089	20.9%	40,549	66,939	65.1%
Polk County	75,403	96,731	28.3%	11,152	18,754	68.2%

(1) U.S. Census, 2010, Table DP-1. (2) Long-term Oregon State's County Population Forecast, 2010-2050, Prepared by Office of Economic Analysis, Department of Administrative Services, State of Oregon. Published March 28, 2013.

## Employment

This chapter provides an overview of employment in Marion and Polk Counties based on data from the 2010-2014 American Community Survey 5-year estimates. A survey of employment information, even at a general countywide level can be helpful in determining the potential transportation demand and needs of low-income people.

**Table 8** provides a “snapshot” of employment and median household income in Marion and Polk Counties and a comparison with the overall state of Oregon. Both counties have a labor force that is similar to the State of Oregon as a whole in terms of the percentage of the overall population that is eligible to participate in work. The unemployment rate (as a percentage of the overall labor force) is approximately one-half percentage point higher in the Salem Metropolitan Statistical Area than in the state of Oregon as a whole. The median household income in Marion County is approximately six percent lower than the statewide median, and in Polk County, the median household income is approximately 2.5 percent higher.

**Table 8. Employment Characteristics**

	Population Aged 16+ <sup>1,2</sup>	% People in Labor Force <sup>1,2</sup>	% Unemployed <sup>3</sup>	Median Household Income <sup>1,2</sup>	Mean Travel Time to Work in Minutes <sup>1,5</sup>
Oregon	3,139,152	62.5%	5.2%	\$50,521	22.7
Marion County	246,971	62.0%	5.6% <sup>4</sup>	\$47,360	21.8
Polk County	60,298	60.0%	5.6% <sup>4</sup>	\$51,880	24.6

(1) ACS 2010-2014 estimate. (2) Table DP03. (3) Data from the State of Oregon Employment Department Labor Trends newsletter from February 2016. Unemployment data is for December 2015. <https://www.qualityinfo.org/documents/10182/89830/Salem+Local+Labor+Trends?version=1.17> (4) Data is for the Salem Metropolitan Statistical Area. (5) Table S0801.





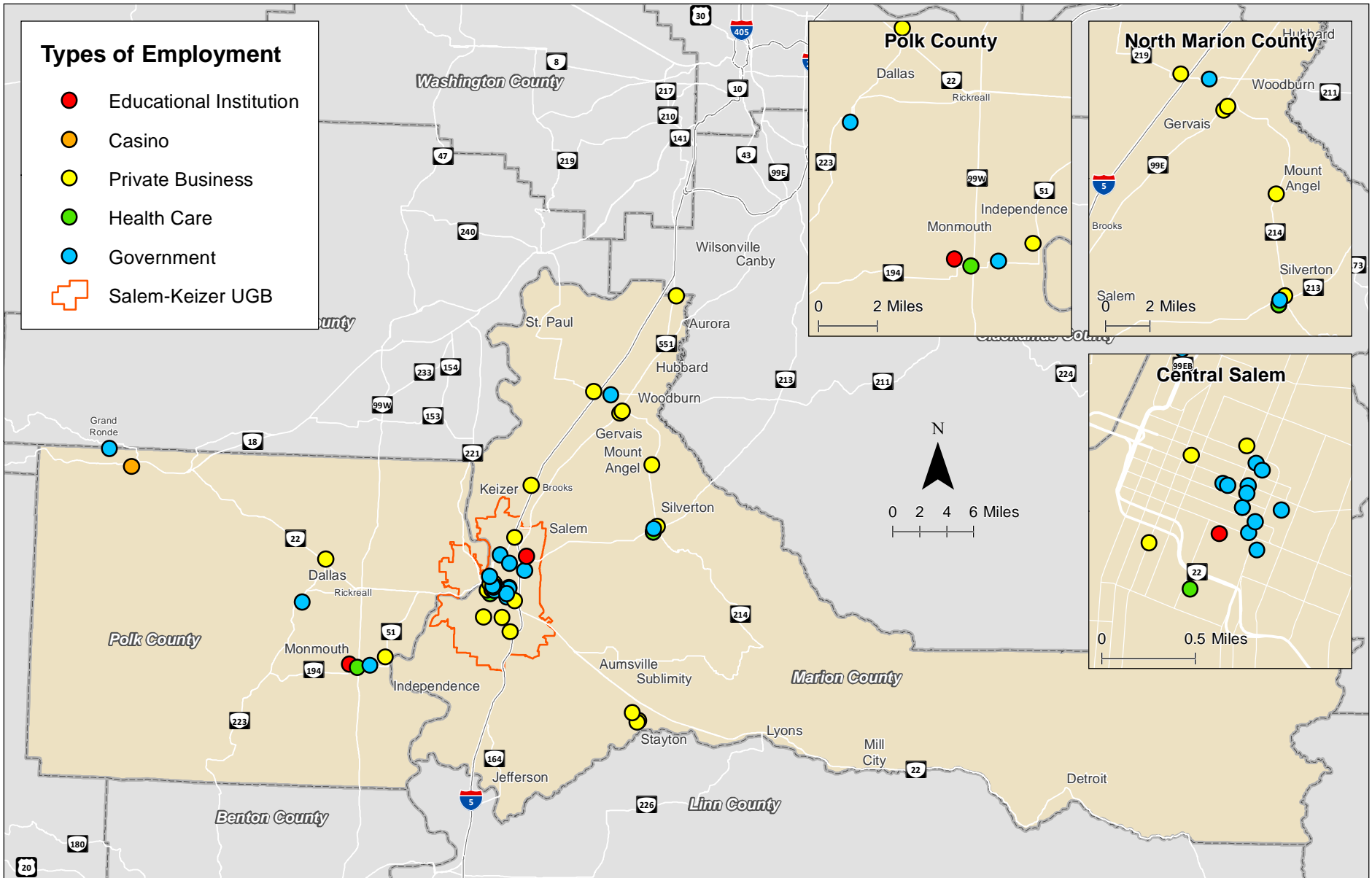
## Major Employers

Identifying major employment locations with Marion and Polk Counties serves two purposes. First, the location of large employers, especially government agencies, in central cities and along major transportation routes, help to define many of the common geographic destinations that seniors and people with disabilities travel to, even if they are not traveling to employment locations, per se. Second, the locations of hospitals and educational institutions, provides a specific set of destinations for seniors and people with disabilities.

According to data from the Oregon Employment Department published as part of the City of Salem's *2014-15 Comprehensive Annual Financial Report*, the State of Oregon provides over 21,000 jobs in the Salem metropolitan area. The federal government, Marion County, and the City of Salem combined provide an additional approximately 4,100 jobs. Educational institutions, including the Salem-Keizer School District (approximately 4,200 employees), and Chemeketa Community College (approximately 1,600 employees), are other large public sector employers. Local government also includes approximately 1,250 employees of the Grand Ronde tribal government. Salem Hospital (approximately 3,900 workers), Kaiser Permanente (approximately 1,200 employees), and NORPAC Foods (approximately 1,200 employees) are the three largest private sector employers in the two counties.

**Figure 6** shows the location of some of the largest employers (with at least 450 employees) by business type (government, educational institutions, health care, private business, Spirit Mountain Casino) in Marion and Polk counties. Some of the largest employers outside of Salem include NORPAC Foods in Stayton, Spirit Mountain Casino in Grand Ronde, Western Oregon University in Monmouth, Silverton Hospital, the Woodburn School District, Mid Valley Health Care in Lebanon, Columbia Helicopters in Aurora, and Bruce Packing Company in Silverton and Woodburn.

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Major Places of Employment

Figure 6

Chapter 4  
Overview of Existing Public Transportation Services



## OVERVIEW OF EXISTING PUBLIC TRANSPORTATION SERVICES

Chapter 4 presents an overview of existing transit service in Marion and Polk Counties. The largest transit service providers are described below. *A list and description of social service agencies that provide some transportation service is included in **Appendix D**.*

### Salem-Keizer Transit

Established in 1979 with the goal of consolidating transit services, Salem-Keizer Transit (SKT) is the primary public transit and complementary paratransit provider to the Salem-Keizer area and Marion and Polk counties. At this time, all Salem-Keizer Transit services operate Monday through Friday. SKT oversees all aspects of public transportation in the Salem-Keizer area including:

- Cherriots fixed route bus service within Salem and Keizer and express service to Wilsonville and Grand Ronde. A map of the Cherriots network is shown in **Figure 7**.
- Chemeketa Area Regional Transportation System (CARTS) bus service to rural communities in Marion and Polk Counties and a small portion of Linn County, and connects riders to Cherriots fixed-route buses in Salem.
- CherryLift is the complementary paratransit service required by the Americans with Disabilities Act (ADA); an origin-to-destination transportation service for people whose disability prevents them from being able to use Cherriots fixed-route buses.
- The RED Line is a shopper shuttle and dial-a-ride service for seniors aged 60 and greater and people with disabilities, which operates within the Salem-Keizer Urban Growth Boundary (UGB).
- The Cherriots Call Center (formerly the TripLink Call Center) takes reservations for the CARTS (flex routes and deviations), CherryLift, and RED Line. The majority of calls are related to Non-Emergent Medical Transportation (NEMT), where the Cherriots Call Center coordinates rides through the region's Coordinated Care Organization (CCO) to eligible Oregon Health Plan (OHP) clients traveling to covered medical services.
- Travel training and mobility management services, which help seniors and people with disabilities use public transit.
- The Cherriots Rideshare program is a one-stop-shop for Willamette Valley transportation options information. Free services include ride-matching,

emergency ride home and transit, cycling, walking and park & ride lot information. Assistance with developing employer and transit pass programs is also available.

- The West Salem Connector demand responsive service connects riders in West Salem to Cherriots fixed route frequent service using smaller vehicles.

### Cherriots

Operating Monday through Friday from 6:00 a.m. to 9:00 p.m., the Cherriots fixed route buses provide comfortable and convenient service in the Salem-Keizer area, and easy connections to Wilsonville and Grand Ronde. Cherriots provides approximately 3.4 million annual rides.

There are 14 fixed routes organized by three route types: Frequent Routes, Standard Routes, and Basic Routes. Frequent Routes provide 15-minute (30-minute during evening hours) frequency on trunks and 30-minute frequency (60-minute during evening hours) on branches. Standard Routes provide 30-minute frequency on trunks and 60-minute frequency on branches. Basic Routes provide hourly service on the entire route.

Service is provided primarily from four transit centers. The Downtown Transit Center is the main transfer location and is located at Courthouse Square in downtown Salem. The second largest transit center is the Keizer Transit Center, which is a hub for buses serving the north end of the Cherriots service area. The smallest transit center is the Glen Creek Transit Center and is located in West Salem where the West Salem Connector and Yamhill County Transit Area buses make connections with Cherriots service. Chemeketa Community College is also considered a transit center due to the number of buses (five Cherriots and two CARTS routes) coming together at that location. The Cherriots fares can be found in **Table 9**. The Reduced & Youth fare is for children 6-18 years of age, senior citizens 60 years or older, disabled people, and Medicare card holders.

**Table 9. Cherriots Fares**

	One-Way	Day Pass	30-day Pass	Annual Pass <sup>1</sup>
Adult (19-59)	\$1.60	\$3.25	\$45.00	\$540.00
Reduced & Youth <sup>1</sup>	\$0.80	\$1.50	\$22.50	\$270.00
Children 5 and under	Free	Free	Free	Free

(1) A summer youth pass is \$40.00.



**Frequent Routes**

**5 5A**  
15 min trunk  
30 min branches

Frequent—buses run every 15 min on trunks (30 min in the evening). On branches, buses run every 30 min (60 min in the evening).

**Standard Routes**

**9 9A**  
30 min trunk  
60 min branches

Less frequent—buses run every 30 min on trunks. On branches, buses run every 60 min.

**Basic Routes**

**7**  
60 min

Hourly service for entire route.

**Select Trips**

-----  
Trips offered only at select times. See schedule for more details.

**Connector Zone**

Flexible, on-demand service that requires a reservation.

Buses run on all routes on weekdays from approximately 6 a.m. to 9 p.m. See schedules for exact times.

**P** Park & Ride **TC** Transit Center

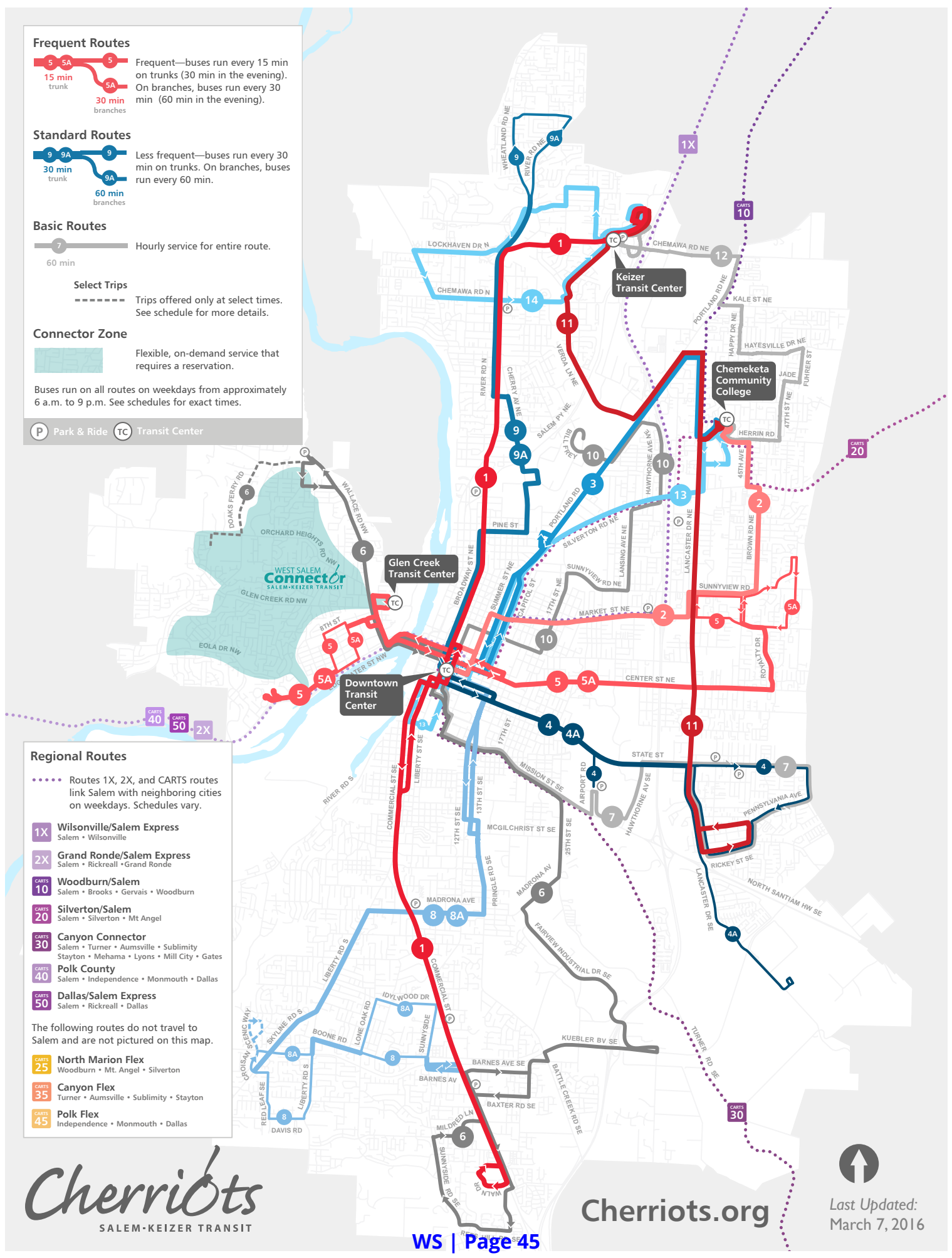
**Regional Routes**

..... Routes 1X, 2X, and CARTS routes link Salem with neighboring cities on weekdays. Schedules vary.

- 1X** Wilsonville/Salem Express  
Salem • Wilsonville
- 2X** Grand Ronde/Salem Express  
Salem • Rickreall • Grand Ronde
- CARTS 10** Woodburn/Salem  
Salem • Brooks • Gervais • Woodburn
- CARTS 20** Silverton/Salem  
Salem • Silverton • Mt Angel
- CARTS 30** Canyon Connector  
Salem • Turner • Aumsville • Sublimity  
Stayton • Mehama • Lyons • Mill City • Gates
- CARTS 40** Polk County  
Salem • Independence • Monmouth • Dallas
- CARTS 50** Dallas/Salem Express  
Salem • Rickreall • Dallas

The following routes do not travel to Salem and are not pictured on this map.

- CARTS 25** North Marion Flex  
Woodburn • Mt. Angel • Silverton
- CARTS 35** Canyon Flex  
Turner • Aumsville • Sublimity • Stayton
- CARTS 45** Polk Flex  
Independence • Monmouth • Dallas



Cherriots.org

Last Updated:  
March 7, 2016



The West Salem Connector is a new service that began operations on June 1, 2015 as a pilot project. Rides on the West Salem Connector are booked in advance via phone or online. Riders identify their origin as one of the 24 Connector points to be picked up, and they may be dropped off at one of the Connector points or the Glen Creek Transit Center that they identify as their destination. Rides on the West Salem Connector cost \$1.60 for a one-way trip (\$0.80 for Reduced & Youth) or \$3.25 for a day pass (\$1.50 for Reduced & Youth). The West Salem Connector service operates from 6 a.m. to 9 p.m. Monday through Friday.

There are two commuter express routes, Cherriots Routes 1X and 2X. The 1X travels between Salem and Wilsonville and is operated in cooperation with the City of Wilsonville's South Metro Area Regional Transit (SMART). Route 1X operates thirteen round trips a day, with two trips in each direction provided by Cherriots during the morning and afternoon peak periods. Beginning in March 2016, in order to reduce over-crowding issues, one afternoon round-trip was added by Cherriots and one morning round-trip by SMART. Rides on the 1X cost \$3.00 for a one-way trip (\$1.50 for Reduced & Youth) or \$85.00 for a monthly pass (\$42.50 for Reduced & Youth) that is also good on buses on the Cherriots and CARTS routes.

Route 2X, provides service between Salem and Spirit Mountain Casino in Grande Ronde, with a stop at the Polk County Fairgrounds park-and-ride in Rickreall. This service is entirely paid for by federal transit dollars the Tribes receive and the only local contribution is the fares passengers pay on-board. No local property taxes are used to pay for the Route 2X service. A connection with the Coastal Connector bus at the Spirit Mountain Casino makes it possible to take public transportation all the way to Lincoln City and other destinations served by Tillamook County Transportation District. Route 2X operates eight round-trips a day, with two trips in each direction during the morning, four in the afternoon, and two during evening hours. The adult one-way fare is \$3.00 or \$85.00 per month for both Routes 1X and 2X. The Reduced & Youth fare for children 6-18 years of age, senior citizens 60 years or older, disabled people, and Medicare card holders is \$1.50 (\$42.50 for a monthly pass). The monthly pass also provides free connections to Cherriots and CARTS.

The Cherriots fleet is composed of diesel and compressed natural gas vehicles that are ADA compliant and equipped with lifts, ramps, or kneeling capability. Buses have an automatic stop announcement system as required by the Americans with Disabilities Act (ADA). Each bus is also equipped with electronic external destination signs and an electronic internal destination and information sign. This is an important accommodation accessibility feature for riders with disabilities. A priority seating area for seniors and people with disabilities is located near the front door of each





vehicle. Buses also have bike racks that accommodate up to two bicycles at a time. *More information on the Cherriots fleet can be found in **Appendix E**.*

### CARTS (Chemeketa Area Regional Transportation System)

CARTS provides transit service to the smaller cities and largely rural areas near Salem in Marion and Polk Counties. The purpose is to provide people access to medical services, education, employment, shopping and recreational opportunities, many of whom are also seniors, disabled people, and economically disadvantaged. Service is provided through deviated fixed routes, flex routes, and general public dial-a-ride. In 2015, CARTS provided approximately 120,000 annual rides.

CARTS buses run Monday through Friday from approximately 6:00 a.m. to 7:00 p.m. and do not provide service on holidays. There are five primary CARTS routes (Routes 10, 20, 30, 40 and 50), all which connect to the Downtown Salem Transit Center. CARTS Route 10 connects with Canby Area Transit (CAT), the Woodburn Transit Service (WTS), and CARTS 25 in the City of Woodburn. CARTS Route 20 connects with the City of Silverton’s dial-a-ride van, The Silver Trolley, and CARTS 25 in the City of Silverton. CARTS 40 connects with CARTS 45 in the Cities of Dallas, Monmouth, and Independence. CARTS 50 connects with Cherriots Route 2X (upon request) at the Polk County Fairgrounds (Rickreal) Park-and-Ride. Volunteer driver programs exist at the West Valley Hospital (Salem Health’s Connections Van) in Dallas and at the hospitals and medical clinics in Silverton, Keizer, and Woodburn (Silverton Health’s CareVan), which are available to people who need rides to their medical appointments.

CARTS operates two flex routes (Routes 25 and 45) and one dial-a-ride (Route 35) that require reservations made 24-hours in advance to the Cherriots Call Center in order to ride. For CARTS Routes 25 and 45, the pick-up and drop-off location must be within the city limits of the communities served in their respective service areas (i.e., Dallas, Monmouth, and Independence for Route 45). CARTS Route 35 is a pure curb-to-curb dial-a-ride service that will pick up and drop off passengers between 8 a.m. and 5 p.m. in any of the following four Canyon Corridor towns: Sublimity, Aumsville, Turner, and Stayton.

While a deviated-fixed route is identified with regular bus stops, CARTS will deviate up to 0.75 of a mile from the route (with a 24-hour advance request made to the Cherriots Call Center) to better serve riders. The routes are shown in **Figure 8**. A description of all eight CARTS routes can be found online on the SKT website at: <http://cherriots.org/en/services/carts>

**Table 10** describes the CARTS fares as of January 2016. CARTS offers discounted fares at about two-thirds of the regular fare for youth, seniors, and disabled people. Monthly passes are also available to riders. Dial-a-ride fares on CARTS are equivalent to regular fixed route fares. Tickets for CARTS services are sold at many locations throughout Marion and Polk Counties, and some are provided by human service agencies to their clients.

**Table 10. CARTS Fares**

	One-Way	Day Pass	Monthly Pass	Universal Month Pass <sup>1</sup>
Adult (19-59)	\$2.25	\$4.50	\$60.00	\$85.00
Youth/Senior/Disabled	\$1.50	\$3.00	\$30.00	\$42.50
Children 5 and under	Free	Free	Free	Free

(1) The Universal Monthly Pass is good on all CARTS, Cherriots, and 1X routes.

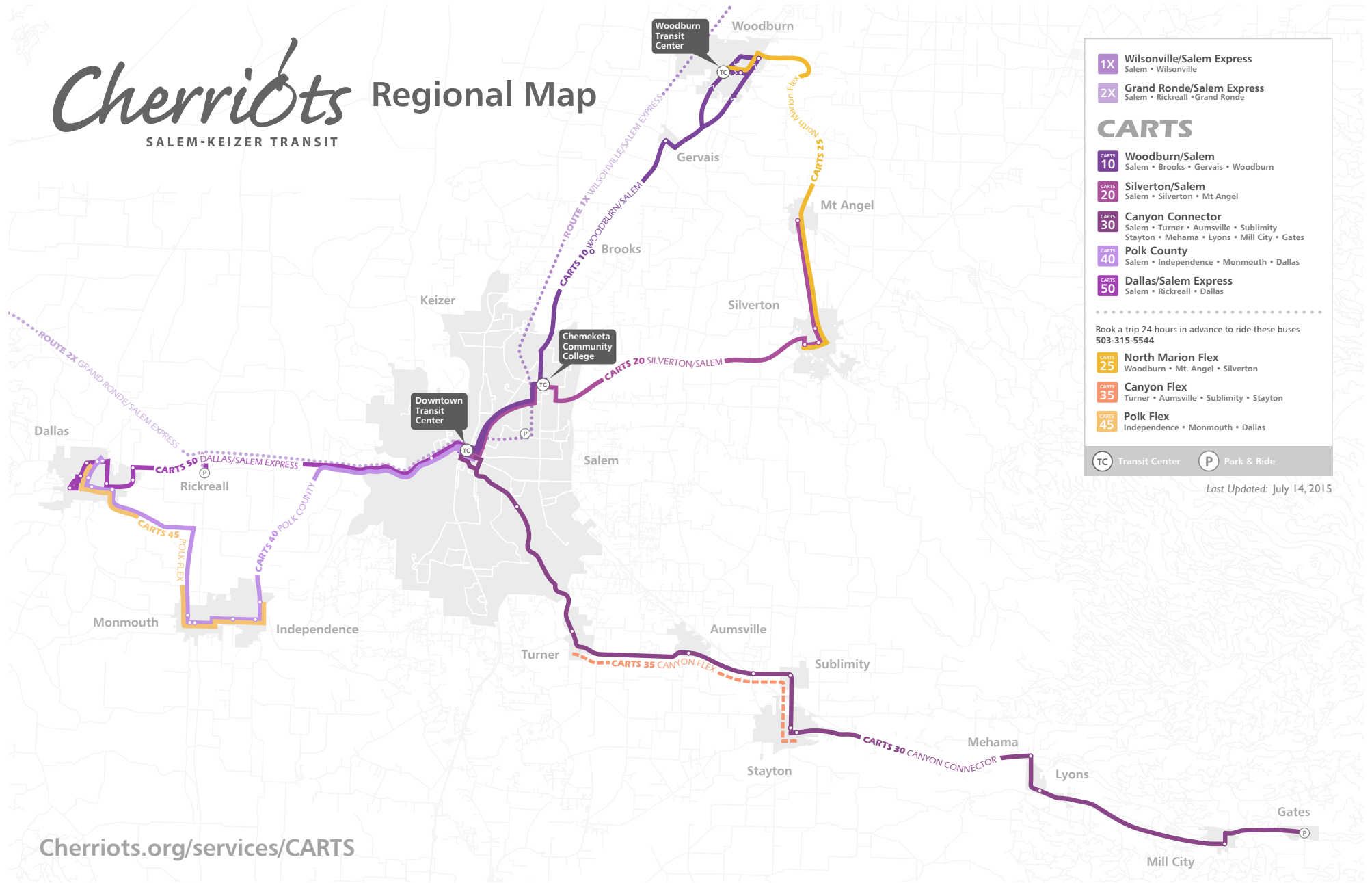
CARTS fleet consists of 15 vehicles. The vehicles seat between 24 and 35 people and are capable of carrying up to two wheelchair passengers each. The vehicles range in age from six to 13 years old. The vehicles are owned by Salem-Keizer Transit. Eleven buses are fitted with a bicycle rack that can transport up to three bikes. The remaining four vehicles have space for two bicycles only. *Data on the CARTS vehicle fleet can be seen in **Appendix E**.*

CARTS administration is located with Salem-Keizer Transit staff in Salem. CARTS operation is contracted out to MV Transportation, Inc., but maintenance is performed by District employees. Due to CARTS’ large service area, vehicles are stationed at three different locations. In Polk County, vehicles are operated out of the Public Works Road Maintenance facility located at 820 SW Ash Street in Dallas while in Marion County vehicles are stored at the Hyacinth Street site in Salem, as well as in Mt. Angel. CARTS does not have its own fueling facility but instead uses Pacific Pride fueling sites located throughout Marion and Polk Counties.



# Cherriots Regional Map

SALEM-KEIZER TRANSIT



**1X Wilsonville/Salem Express**  
Salem • Wilsonville

**2X Grand Ronde/Salem Express**  
Salem • Rickreall • Grand Ronde

**CARTS**

**CARTS 10 Woodburn/Salem**  
Salem • Brooks • Gervais • Woodburn

**CARTS 20 Silverton/Salem**  
Salem • Silverton • Mt Angel

**CARTS 30 Canyon Connector**  
Salem • Turner • Aumsville • Sublimity  
Stayton • Mehama • Lyons • Mill City • Gates

**CARTS 40 Polk County**  
Salem • Independence • Monmouth • Dallas

**CARTS 50 Dallas/Salem Express**  
Salem • Rickreall • Dallas

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Book a trip 24 hours in advance to ride these buses  
503-315-5544

**CARTS 25 North Marion Flex**  
Woodburn • Mt. Angel • Silverton

**CARTS 35 Canyon Flex**  
Turner • Aumsville • Sublimity • Stayton

**CARTS 45 Polk Flex**  
Independence • Monmouth • Dallas

**TC** Transit Center    **P** Park & Ride

Last Updated: July 14, 2015

[Cherriots.org/services/CARTS](http://Cherriots.org/services/CARTS)

## CherryLift

CherryLift is the ADA complementary paratransit service offered by SKT within the Cherriots service area, which is defined by the Salem-Keizer Urban Growth Boundary. CherryLift provides origin to destination service to ADA-certified people unable to ride Cherriots. CherryLift provides approximately 146,000 annual rides. A 24-hour advanced reservation is required to ride CherryLift. Service hours and days parallel those of Cherriots. The fare is \$3.20 each way and can be paid in either cash or using a CherryLift ticket. CherryLift does not accept Cherriots passes. CherryLift is operated by a contracted transportation provider, currently MV Transportation, Inc. *Data on the CherryLift vehicle fleet can be seen in **Appendix E**.*

## RED Line Shopper Shuttle and Dial-a-Ride

The RED Line shopper shuttle and dial-a-ride services are administered by Salem-Keizer Transit and operated by MV Transportation, a contracted transportation provider. The RED Line provides transportation services for seniors and people with disabilities. Through Federal Fiscal Year 2017, the RED Line has been funded entirely by federal Section 5310 grant funds, which are specific to the Salem-Keizer urban area. *Data on the RED Line vehicle fleet can be seen in **Appendix E**.*

The RED Line dial-a-ride picks you up at home and takes you to any destination in the Salem-Keizer urban growth boundary. The cost is \$3.20 for a one-way trip, and a book of ten tickets is \$32. Service is available Monday through Friday, from 8 a.m. to 6 p.m. Medical appointments have priority when making trip reservations on the dial-a-ride. Reservations must be made by 5 p.m. the day before you wish to ride. Reservations can be made up to 14 days in advance. The call center is open Monday through Friday from 6 a.m. to 7 p.m. and Saturday from 10 a.m. to 4 p.m. For \$1.25, the RED Line shopper shuttle picks you up and takes you shopping at designated store locations determined by your place of residence. A book of ten tickets costs \$12.50. Four vehicles are available to transport people in each direction, including their groceries. All vehicles are ADA-accessible.

## Mobility Management

Mobility Management is responsible for researching, planning, developing, coordinating, and implementing projects and programs related to public transportation options specializing in seniors and people with disabilities. Mobility Management offers a wide variety of individualized travel options and programs including: travel training, mobility device training, route planning, free Community Transportation Services and Program Presentations, distribution of informational transportation resources, attends resource fairs, community event attendance,



speaks at community meetings, as well as collaborating and facilitating partnering opportunities with other agencies throughout the community. Mobility Management is a customer-driven, market-based approach to transportation focused on connecting the community to transportation. *The Mobility Management Work Plan is included as **Appendix F**.*

The Travel Trainer designs and implements individual travel training based on the assessment of client mobility and identification of client travel needs and travel route; sets up meetings to discuss training with client, and caretakers, if appropriate; and schedules trip to obtain ID and applicable passes. The Travel Trainer models appropriate travel behavior, instructs the trainee in emergency procedures; instructs client in mobility device use; and prompts trainee on appropriate behavior. After the initial training, the Travel Trainer observes the client traveling first with, then without their knowledge to verify application of learned transit skills from travel training.

### Medicaid Brokerage

Salem-Keizer Transit serves as the Medicaid transportation broker for Marion and Polk Counties. This means that the Cherriots Call Center takes all non-emergency medical transportation (NEMT) calls for the two-county region. Non-emergency medical transportation is provided to Medicaid eligible people, with costs reimbursed through the Oregon Health Authority and Willamette Valley Community Health/CCO. Transportation is scheduled with the most appropriate and cost-effective means that meets a client's needs, including the following types of transportation services: bus (tickets/pass); wheelchair van/bus; taxi or sedan; secure transport; stretcher car. Approximately 22 service providers are authorized to deliver services on behalf of the program.

Qualified clients phone the Cherriots Call Center (which also serves as the call center for CherryLift, CARTS, and RED Line) to schedule transportation. Customer Service Representatives verify their eligibility and schedule their ride with a transportation provider who is under contract with Salem-Keizer Transit. The service is door-to-door. If a client requires further assistance, a personal care attendant provided by the client will be required.

About 75 percent of calls received in the Call Center are requests for NEMT rides. Transportation may be provided 24 hours a day, 365 days a year for these trips only. There is no cost to eligible clients for OHP/Medicaid Transportation services. During fiscal year 2015, 581,184 trips were booked through the Call Center via CherryLift, NEMT, RED Line Shopper Shuttle, and Dial-a-Ride services. The Cherriots Call Center is open every day except New Year's Day, Memorial Day, Fourth of July, Labor Day,

Thanksgiving Day and Christmas Day. Hours of operation are Monday through Friday 6 a.m. to 7 p.m. and Saturday 10 a.m. to 4 p.m.

### Woodburn Transit

The City of Woodburn operates one transit route in the major areas of Woodburn. The bus runs hourly on weekdays from 7:00 AM to 7:00 PM. The City also operates a local dial-a-ride program for seniors and people with disabilities on weekdays, for city of Woodburn residents who cannot utilize the fixed-route bus. The service operates during the same hours as the fixed-route bus and utilizes a fully ADA accessible van. Ride requests must be made 24 hours in advance.

The dial-a-ride service will also arrange for volunteer drivers organized through the Retired and Senior Volunteer Program (RSVP) to take seniors and disabled residents to medical appointments in Woodburn, Salem, and Portland with 24-hour notice. Woodburn Transit fares are \$1.00 for the fixed route and \$2.50 for the dial-a-ride service.

For fixed route and paratransit service outside of the city, Woodburn residents can use CARTS.

### Silver Trolley

The City of Silverton operates the Silver Trolley service utilizing two accessible vehicles. Although the Silver Trolley is a general public dial-a-ride service, most trips are made by people who do not have access to a car.

Service is provided Monday through Friday from 9:00 AM to 4:45 PM and Saturday 9:00 AM to 3:30 PM. A 24-hour advance request for a trip is suggested but not necessary. The service is free, but donations are accepted.

Staff estimates that of the 14,000 to 18,000 trips provided per year, approximately 30% are to the hospital. Silverton owns one cutaway vehicle and one ADA accessible van housed at the community center and uses part-time drivers. Some maintenance functions are provided in-house while others are provided by local businesses. The City is responsible for scheduling and dispatching of the Trolley trips.

### Canby Area Transit (CAT)

Canby Area Transit (CAT) provides service within Canby and to Oregon City, Aurora, Hubbard, and Woodburn from Canby Transit Center, the central transit terminal in Canby. Route 99 is the only line currently in operation and provides circulation within the city between the Canby Market Center, Canby Transit Center, and Canby Square





areas with headways between 30 and 90 minutes. Service is provided between 5:00 a.m. and 9:00 p.m. Monday through Friday and does not operate on major holidays. Route 99 makes 20 daily trips from Oregon City to the Canby Transit Center, and continues on to Aurora, Hubbard, and Woodburn eight times per day. The route provides connections to TriMet at the Oregon City Transit Center, Woodburn Transit and CARTS Routes 10 and 25 in Woodburn, SMART Route 3 at The Canby Transit Center. CAT service on Route 99 costs \$1.00 for a one-way ride, and is free for children six years old and younger. A monthly pass may be purchased for \$20.00.

SMART operates the Purple line (SMART Route 3) between Canby and Wilsonville. There are 8 daily round-trips. The service costs \$1.50 per trip for adults and \$0.75 for seniors(60+), disabled, and youth outside of the CAT and SMART fareless zones. A transfer to TriMet WES Commuter Rail is possible at SMART Central at Wilsonville Station.

CAT operates a Dial-A-Ride service for the general public who are traveling to or from destinations within the Canby Urban Growth Boundary. Service is available from 8:00 a.m. to 6:00 p.m. Monday through Friday. Service is not available during major holidays. Dial-A-Ride vehicles are equipped with wheelchair lifts, prioritized seating for seniors and people with disabilities, and bicycle racks. Paratransit service is available for eligible people who are unable to use shuttles or fixed route buses. Reservations can be made via phone up to 14 days in advance. General Dial-A-Ride service costs \$1.00 for a one-way ride.

### South Metro Area Regional Transit (SMART)

South Metro Area Regional Transit (SMART) is operated by the City of Wilsonville and provides public transit service in and around Wilsonville. SMART operates nine fixed bus routes from 5:00 AM to 9:48 PM on weekdays, two routes (Routes 2X and 4) on Saturdays, and does not operate on Sundays or major holidays. Route 9X offers one trip to Portland and Beaverton at 10:12pm weekdays.

Route 1X is jointly operated by Salem-Keizer Transit and runs between SMART Central at Wilsonville Station and the Downtown Salem Transit Center. Route 2X travels to the Barbur Boulevard Transit Center in Portland and connects with TriMet Routes 12, 64, and 94. Route 3 travels to Canby Transit Center allowing for direct transfers with CAT Route 99. Routes 4, 5, and 6 operate exclusively within Wilsonville. Routes 5 and 2X connect with TriMet Route 96, with service to downtown Portland, at Commerce Circle in Wilsonville. Route 7 provides a shuttle service to and from the Villebois neighborhood in West Wilsonville. Route 8X (AM only) provides shuttle service from the Beaverton Transit Center to Wilsonville when

TriMet’s WES train is not running. Route 9X (PM only) provides shuttle service from Wilsonville to major Wilsonville area employers, downtown Portland, and the Beaverton Transit Center. All SMART routes connect with TriMet WES Commuter Rail at SMART Central at Wilsonville Station. WES provides weekday service to Tualatin, Tigard, and Beaverton.

SMART fares are shown in **Table 11**. Service is free on Routes 4, 5, 6, and 7 that operate within the City of Wilsonville. Monthly passes for Route 1X only are available for \$85.00 (\$42.50 for youth, seniors, disabled, or Medicare card holders). Monthly passes for Routes 2X and 3 only are available for \$35.00 (\$17.50 for youth, seniors, disabled, or Medicare card holders). A monthly pass valid for all routes is \$120.00 (\$60.00 for youth, seniors, disabled, or Medicare card holders).

**Table 11. SMART Fares**

Fare Type	Route(s)				
	1X	2X, 3	4, 5, 6, 7	8X	9X
Adult (19-59)	\$3.00	\$1.50	Free	\$3.00	\$1.50 Barbur TC \$3.00 Portland
Youth (5-17) / Senior (60+) / Disabled Medicare Card Holders	\$1.50	\$0.75	Free	-	-

SMART operates a door-to-door Dial-A-Ride service for people in Wilsonville who are unable to use the fixed route system. Priority is given to riders that meet ADA eligibility requirements. Dial-a-Ride services operate from 5:00 a.m. to 9:15 p.m., Monday-Friday and 8:30 a.m. - 5:30 p.m. on Saturdays. Service may be scheduled up to 14 days in advance by making a reservation by phone. Service is free within the City of Wilsonville and \$3.00 for a one-way trip on Routes 2X and 3. All Dial-A-Ride vehicles are fully accessible.

**Tri-County Metropolitan Transportation District of Oregon (TriMet)**

Tri-County Metropolitan Transportation District of Oregon (TriMet) is the transit operator for the Portland metropolitan area including parts of Multnomah, Washington, and Clackamas Counties. TriMet is the largest transit operator in the state and provided over 101 million boardings in the Fiscal Year 2015 on 79 bus lines, five MAX light rail lines, and the Westside Express Service (WES) Commuter Rail. Service across the TriMet system is generally available from approximately 4:30 AM to 2:30 AM daily. Fares on TriMet are shown below in **Table 12**, and allow passengers





to ride on any combination of buses, MAX light rail, WES, and on the Portland Streetcar system.

**Table 12. TriMet Fares**

Fare Type	2.5-Hr Ticket	1-Day Pass	7-Day Pass	14-Day Pass	Monthly Pass
Adult (18-64)	\$2.50	\$5.00	\$26.00	\$51.00	\$100.00
Honored Citizen (65+) / Youth (7-17)	\$1.25	\$2.50	\$7.50	\$14.50	\$28.00
LIFT Paratransit	\$2.50	-	-	\$37.50	\$74.00

LIFT is TriMet’s shared-ride service for people who are unable to use regular buses or trains due a physical or mental disability. Passengers must apply and be registered customers in order to use LIFT. The LIFT service area covers all locations within TriMet’s service boundary that are three-fourths of a mile of TriMet bus and light rail routes. Service hours are similar to TriMet’s regular service window and are available from 4:30 a.m. to 2:30 a.m. daily. Advance reservation is required for all trips, and must be made before 5:00 p.m. on the day before the trip. More information on TriMet’s LIFT program can be found online at this URL: <http://trimet.org/pdfs/lift/liftguide.pdf>

The TriMet system provides connections to surrounding transit systems including Salem-Keizer Transit; C-TRAN in Vancouver, Washington; Columbia County Rider (CC Rider); Tillamook County Transit (The Wave); Columbia Area Transit; SMART; CAT; Sandy Area Metro (SAM); Central Oregon Breeze; Amtrak; Point (Amtrak through) buses; and private companies such as Greyhound and the Bolt Bus.

**Yamhill County Transit Area (YCTA)**

Yamhill County Transit Area (YCTA) provides public transit service in Yamhill County and connections to the TriMet and Salem-Keizer Transit systems. Local service is provided in McMinnville (Route 2: East-West Express and Route 3: City Loop) and Newberg (Route 5 and Route 7) on weekdays. There is no local service in McMinnville or Newberg on the weekends or on major holidays. In addition to local services, Yamhill County Transit provides several routes connecting communities in the area.

- Route 11 (McMinnville - Salem): Connects McMinnville to West Salem at the Glen Creek Transit Center for transfers to Cherriots, and the West

- Salem Connector. Route 11 makes two morning, a midday, and two afternoon round trips on weekdays.
- Route 22 (McMinnville - West Valley): Connects McMinnville to Sheridan, Willamina, and Grand Ronde with seven weekday round trips, and four Saturday round trips.
  - Route 33 (McMinnville - Hillsboro): Connects McMinnville to Carlton, Yamhill, Gaston, Forest Grove and to the MAX light rail (Blue Line) in Hillsboro with two morning, a midday, and two afternoon round trips on weekdays.
  - Route 44 (McMinnville – 99W): Connects McMinnville to Lafayette, Dundee, Newberg, Sherwood, and Tigard. Route 44 operates ten weekday round trips, which includes an express route (Route 45x), and four Saturday round trips.

Fixed route one-way regular fare is \$1.25 and a single day-pass is \$2.50. Unlimited monthly passes are \$35.00. Service runs from 5:00 a.m. to 9:00 p.m.

YCTA provides curb-to-curb Dial-A-Ride services for anyone who is unable to access the fixed route system due to mobility limitations or those whose origins and destination are not within close proximity to fixed routes. The fare is \$1.75 one-way and \$40.00 for an unlimited monthly pass. Dial-A-Ride service operates from 8:00 am to 4:30 pm on weekdays. Reservations must be made 24 hours in advance by phone.

### Albany Transit

Albany Transit System (ATS) provides public transit service within the City of Albany. ATS connects to the Linn-Benton Loop and the Linn Shuttle buses at the Albany Transit Center located at the Amtrak Station downtown. The Linn-Benton Loop provides service to Corvallis, and the Linn Shuttle serves Lebanon and Sweet Home. Local service in Albany is provided with hourly frequency on three routes between 6:30 a.m. and 6:30 p.m. on weekdays. There is no local service on the weekends or on major holidays.

Fixed route one-way regular fare on ATS buses is \$1.00 and \$0.50 for seniors older than 60 years, people with disabilities, and youth aged 6-17 years old. Unlimited monthly passes are \$30.00 and \$15.00 for seniors, people with disabilities, and youth. Coupon books containing 20 rides each can be purchased for \$17.00 for regular fares and \$8.50 for seniors, people with disabilities, and youth.

ATS also provides curb-to-curb Call-A-Ride services within the City of Albany on wheelchair lift-accessible buses. Eligibility is limited to those residents who live



within the City of Albany and are over 60 years old or have a disability that prevents them from accessing the fixed route system. The fare is \$2.00 one-way and \$40.00 for an unlimited monthly pass. Dial-A-Ride service operates from between 6:30 a.m. and 6:30 p.m. on weekdays and from 8:00 a.m. to 6:00 p.m. on Saturdays. No service is provided on Sunday or on holidays. Reservations can be made up to two weeks in advance by phone for the Call-A-Ride.

#### Tillamook County Transportation District

In addition the other services provided by the Tillamook County Transportation District (TCTD), the Coastal Connector provides a weekday timed-transfer with Cherriots Route 2X at the Spirit Mountain Casino in Grand Ronde. On weekends, the Coastal Connector provides service all the way to Salem where it serves the Amtrak/Greyhound Station.

#### PARTICIPATING HUMAN SERVICE AGENCIES

Social service providers in Marion and Polk Counties include a wide array of schools, churches, nonprofits and human service agencies. Many of these operate a single van or, in some cases, a passenger vehicle. These include agencies that provide, utilize, and need transportation. Contact information is given for each organization to help aid in the future exchange of information and for coordination among agencies. *Information about the participating human service agencies can be found in **Appendix D.***

*Information received from the survey of transit providers and participating human service agencies can be found in **Appendix G.***



Chapter 5  
Needs Assessment



## NEEDS ASSESSMENT

Developing a comprehensive and updated needs assessment is an important part of the Coordinated Plan planning process. The Coordinated Plan focuses on the transportation needs, gaps and challenges specific to people with disabilities and seniors. The Coordinated Plan will identify actions intended to address these needs, and will serve as the basis and rationale for potential future applications to the Special Transportation Fund Advisory Committee (STFAC) for federal and state funding.

The needs assessment was developed using demographic analysis, stakeholder outreach, and through a survey of transportation providers, social service agencies, and other organizations.

The demographic analysis of the Marion and Polk County areas used 2010 data from the U.S. Census, 2010-2014 data from the most recent five-year American Community Survey (ACS), and population estimates from the most recent publication of the State of Oregon's Office of Economic Analysis in 2013. The analysis outlines recent and future trends for the total population and seniors in the two-county area as well as ACS data for people with disabilities.

The stakeholder outreach component of the needs assessment included outreach and discussions with the key stakeholders involved in planning and delivering transportation services and social services to have them articulate and share their experiences, perceptions and opinions about which needs are most critical to meet. This outreach was conducted utilizing a survey and a set of four regional stakeholder workshops that were held in Marion and Polk counties.

### EXISTING SERVICE REVIEW

The workshops meetings began by asking the stakeholders to provide examples of services that are currently working well in their communities. This was done to create a positive environment for the workshops, to reinforce the idea that SKT is already meeting many of the needs of seniors and people with disabilities, to recognize that the Coordinated Plan process seeks to build on the existing services, and to share good examples of existing programs and experiences that are working well with other participants and the SKT and ODOT staff in attendance. Responses from workshop participants that highlight existing positive experiences with existing services include:

- Salem-Keizer Transit services
  - Participants expressed positive experiences with services within the Salem-Keizer Urban Growth Boundary.

- Participants felt that it was, “...refreshing to see the interest from CARTS/Cherriots [SKT] for information from all communities.”
- Bus drivers and travel training programs were described positively.
- SKT vehicles, including ADA-accessible vehicles, are well maintained.
- CherryLift drivers were described as patient, kind and interact well with staff and riders.
- CherryLift is an excellent asset to and increases the independence of people who attend a day program or have a job.
- CARTS works well in the Santiam Canyon area, especially for seniors and youth.
- Early morning (6:30 a.m.) CARTS service, CARTS Route 25, and CARTS in Polk County
  - The Cherriots NEMT service
- Medical service programs
  - Beginning in 2015, Salem Health began a project funded by a STF grant to provide a transportation coordinator for hospital patients needing assistance to get to their medical appointments. The Salem Health Foundation funds a large portion (with donations accepted) of the taxi service that is offered for any individual, regardless of where they live in Marion and Polk Counties, for travel to/from any of their clinics.
  - Silverton Health CareVan (a volunteer driver program assisting patients to travel to their medical appointments in Silverton, Mt. Angel, Woodburn, and Keizer).
- Dial-A-Ride services and Age in Place programs in Woodburn
- Volunteer driver programs

## NEEDS ASSESSMENT

This section presents a list of identified unmet public transportation needs as described from the stakeholder workshops, a survey that went to local transit service providers and social service agencies in November and December 2015, and





applicable remaining needs from Salem-Keizer Transit’s 2009 Coordinated Transportation Plan.

### Transportation Service Needs

- Restoration of services, such as Saturday or evening hour service, which had been previously cut
- Increase service availability
  - Service span (early morning and evenings)
  - Weekends and holidays
  - Commuter and midday (10 a.m. – 2 p.m.) routes
- Increased service geographic scope
  - Unserved or underserved areas
    - Small communities, rural, and low-density areas (primarily CARTS service)
      - Aumsville, Dallas, Detroit, Donald, Falls City, Gates, Grand Ronde, Idanha, Independence, Jefferson, Mill City, Monmouth, Mt. Angel, Rickreall, Scotts Mill, St. Paul, Stayton, and Turner
      - Unincorporated north and east Marion County and western Polk counties, Santiam Canyon area
    - Expanded inter-city and inter-county service
      - Albany, Lincoln City, Mt. Angel, Oregon City, Portland, Salem, Silverton, Tillamook, Tualatin, Wilsonville, and Woodburn
  - Lifeline/basic needs destinations such as shopping, groceries, social services, and medical facilities
- Increase service quality
  - Frequency
  - Reduce route travel time
  - Improve reliability, schedule adherence, and on-time arrivals
  - Add additional stops to make boarding/alighting easier

- Dial-A-Ride (DAR)
  - Need DAR in Mehama, Mill City, and other rural communities
  - DAR vehicles not always suitable for some people in need
  - DAR services for basic needs (shopping, medical, recreation)
- Door-to-door and door-through-door paratransit service in Polk County outside of the Salem UGB area and in southern Marion County
- Underserved groups
  - Addiction counseling/group therapy services in Polk County
  - Oregon Health Plan (OHP) enrollees and others who don't qualify for Medicaid services and who do not have the means to fulfill their transportation needs
  - Youth
  - People who are unable to schedule service in advance
  - People who are unable to accommodate lengthy trip times

#### Infrastructure Needs

- Bus stops
  - Accessibility needs (e.g. ADA-compliant curb ramps, level sidewalks)
  - Bus shelters
  - Better signage for bus stops and shelters
- Pedestrian improvements
  - Crosswalks near bus stops
  - Complete gaps in sidewalk network
- Small transit centers in communities without a transit center or major transit stop with a shelter

#### Coordination and Organizational Needs

- Coordinate services that cross jurisdictional and transit provider service area boundaries
  - Reduce duplication of services
  - Maintain and enhance service connectivity among local operators



- Coordinate services among social service agencies, senior centers, medical facilities, employers, and other organizations to share information about local transportation options, training opportunities, and other information
- Central dispatch for transportation services
- Fare sharing services such as the ability to use the day pass on both the CARTS and Cherriots systems
- Apply technological solutions to facilitate coordination efforts

#### Marketing, Customer Service, and Outreach Needs

- Increase accountability, customer service, responsiveness, and human interaction
- Increase the amount of information available in Spanish
- Improve transit service branding to differentiate services (a refresh of the brands for each of the services SKT provides is expected to launch in early 2017)
- Improved access to and availability of information, education, and outreach about the range of transportation providers and services is needed in both the urban and rural areas
- Service advertising
  - Improve awareness of the availability of different transit services (e.g. CARTS and Cherriots) and how they work together
  - Old media: radio, local publications, bus shelters, 211 service, kiosks, brochures
  - New media: Internet, Facebook, Twitter
  - Targeted advertising/outreach to specific groups (e.g. churches, social service agencies, senior centers, visually-impaired communities), and at destinations such as hospitals
- Increase the number of volunteer drivers

#### Technology Needs

- CARTS vehicles need fareboxes identical to Cherriots for fare integration
- Security cameras on RED Line vehicles and some CherryLift vehicles (cameras are not currently in any CherryLift MV-1 vehicles)

- Speaking/digital schedules at bus stops
- Electronic signs at transit centers and major bus stops listing the next bus arrival
- Equip buses with AVL and/or GPS systems for real-time tracking
- Text alerts on additional transit services (currently, riders on the West Salem Connector can receive a text or automated phone call to tell them when the bus is five minutes away from their stop.)
- Expand on web-based ride reservation system pilot project that is currently underway with Willamette Valley Community Health and/or the West Salem Connector web-based booking system

#### Capital and Funding Needs

- Bus and equipment replacements
- Provide high quality buses that meet a range of physical needs
- Service additions and enhancements
- Fare subsidies



Chapter 6  
Priorities and Strategies



## PRIORITIES AND STRATEGIES

This chapter presents an overview of strategic initiatives, technologies, opportunities for coordination and other methods to improve transportation services for seniors and people with disabilities within Marion and Polk Counties. The strategies were generated from the four stakeholder meetings, the existing 2009 Coordinated Plan, current transit research, and a review of Coordinated Transportation Plans from peer agencies.

### Priorities

The existing 2009 Coordinated Plan identifies a set of priorities used to weight the selection of transportation strategies and funding decisions. The five priorities were, in descending order of importance:

1. Maintain current public transportation service in rural and Marion and Polk Counties.
2. Maintain current Monday through Friday service in the urban area.
3. Add additional hours (earlier in the morning and later in the evening) to the current transportation service in rural Marion and Polk Counties.
4. Maintain current shopper shuttles in the urban area.
5. Provide medical transportation for non-Medicaid people in rural Marion and Polk Counties.

During the stakeholder workshops, participants were asked to comment on a set of priorities based partially on the previous list, along with additional priorities. When presented to project stakeholders during the four workshops, there was general agreement that the following seven priorities should be included as part of SKT's updated Coordinated Plan. These Priorities should guide the decisions made by SKT to implement the Plan including how to evaluate funding applications.

- Maintain/improve/expand existing services, increase capacity/hours, improve service quality, avoid service reductions, in both urban and rural areas.
- Provide for adequate capital replacements and maintenance of vehicles and other fundamental requirements to provide service.
- Consider providing non-emergency medical transportation for non-Medicaid people in rural Marion/Polk Counties

- Consider cost-effectiveness in making funding decisions (such as \$ per ride, % match), but balance that with the need to provide accessibility throughout Marion and Polk counties.
- Develop policies that identify a target for distribution of funds on strategic and equitable bases to address the needs of the region’s seniors and people with disabilities.
- Implement new and innovative initiatives related to technology and collaborative partnerships to improve service to underserved communities and people.
- Enhance rider experience and sense of dignity by being sensitive and attentive to the varied needs of people and by emphasizing a customer service model.

In the previous plan, three of five identified priorities sought to maintain the existing (2009) level of transit service provided by SKT, and all five priorities specifically concerned an aspect of transit service levels. The new list of priorities combines the previous five priorities into two items. Because of the multifaceted and complex nature of providing transit service for seniors and people with disabilities, the updated set of priorities takes a comprehensive approach in expressing that reality. Striving for equitable investment and funding decisions while maintaining a cost-effective operation will allow SKT to provide greater amounts of transit service to those in need, and setting a priority that demands an exploration of innovative ideas and technologies will allow SKT to keep up with the growth in the senior and disabled populations.

## Strategies

The strategies presented and discussed in this chapter are intended to address or mitigate transportation needs for seniors and people with disabilities as identified in the needs assessment. This is an important element of the Coordinated Transportation Plan in that it responds to federal planning requirements; in addition, it provides an opportunity to document regional service priorities as well as to identify lead entities responsible to implement them.

## Transportation Service Strategies

- Sustain current service levels.
- As funding allows, continue implementation of Phase II of the “Moving Forward” plan (addition of weekend, holiday, extended evening service,





- and a student bus pass program to Cherriots fixed-route and CherryLift buses).
- Develop service area guidelines<sup>2</sup> for Salem-Keizer Transit and use the guidelines to address gaps in public transit services.
  - Identify areas with the greatest need for additional or enhanced transit services.
    - Add weekend service on Cherriots, CARTS, and CherryLift.
    - Extend evening hours on Cherriots and CARTS during the weekdays.
    - Improve frequencies where service is too infrequent.
  - Increase capacity of existing volunteer programs by increasing the fleet of accessible vehicles for community-based services.
  - Review services such as the West Salem Connector and identify additional locations in the two-county area this service could be replicated.
  - Explore options for circulator, feeder route, and flexible route Dial-A-Ride services.
  - Improve regional connections between modes and service providers.
  - Where allowable, explore partnerships with Transportation Network Companies (TNCs) such as Uber or Lyft to provide first-mile/last-mile transportation for customers that can utilize fixed-route transit for part of their trip.
  - Explore opportunities to expand Drive Less Connect or develop a new platform for ride-matching for seniors and people with disabilities.

### Infrastructure Strategies

- Review existing pedestrian plans in Marion and Polk Counties for opportunities and funding sources to improve sidewalk and pedestrian infrastructure.

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<sup>2</sup> Service area guidelines are a tool for assessing the level of service currently provided and identifying unmet needs or gaps. While each recommended guideline may not be achieved, it should remain a target for ongoing improvement. The public and policy-makers should not view these guidelines as guaranteed levels of service but rather as ways to measure progress toward an ideal continuum of transportation service.

- Prioritize bus stop locations needing improvements.
- Coordinate with local jurisdictions to identify opportunities to improve stop accessibility during roadway construction or development projects.
- Advocate for age- and disability-friendly streets and roads.
- Develop strategies (e.g. incentives, mutual planning requirements) to influence the siting of facilities that provide services to seniors and/or people with disabilities.
- Create a safer transit environment by following the principles of Crime Prevention Through Environmental Design (CPTED) on new or upgraded transit facilities.

### Coordination and Organizational Strategies

- Develop a calendar for staff to periodically review the Coordinated Plan and to bring an assessment to the STFAC to evaluate progress and make updates as needed.
- Coordinate with medical facilities, seniors and/or people with disabilities transportation consumers, and their representatives to optimize trip scheduling.
- Coordinate with public and private sector organizations to identify opportunities for joint scheduling or sharing of vehicles. (The Dallas and Monmouth senior centers are an existing example.)
- Expand awareness of home delivery services (e.g. grocery shopping, library services) to people who stay at home to assist with “aging in place” and providing independence for people with disabilities. (Review the existing Age in Place program in Woodburn as a successful example).
- Monitor Oregon Health Plan funded non-emergency medical transportation for coordination opportunities.
- Review the Silverton Health program (CareVan) for trips to/from the hospital for opportunities to coordinate trips for passengers along route.

### Marketing, Customer Service, and Outreach Strategies

- Develop and distribute information promoting travel options counseling services and provide web- and application-based information systems.
- Increase communication and marketing efforts to make members of the public and policy-makers aware of transportation options.



- Encourage seniors and people with disabilities to use online trip planning tools.
- Explore a fare assistance program for people whose primary barrier to using public transit is financially based.
- Provide more driver training to ensure a positive, consistent customer experience by incorporating feedback from well-regarded drivers.
- Expand travel training programs that cover topics such as how to use the Dial-A-Ride system, make transfers between transit systems and destinations, and use online tools and applications.
- Enhance and develop travel training material such as videos, educational brochures, and provide on-location presentation by travel trainers.
- Conduct outreach to increase the number and geographic area of volunteer drivers.
- Survey riders for feedback to improve drop-of/pick-up locations.

#### Technology Strategies

- Develop and test new technology to improve service efficiencies.
- Develop or purchase open source software to enable multiple operators to connect with a single clearinghouse for trip planning and scheduling.
- Work towards providing real-time information for scheduled rides and same-day or on-demand scheduling.
- Develop a centralized information system that can be accessed by people needing information on applicable transportation resources.

#### Capital and Funding Strategies

- Advocate for increased funding and seek out new and innovative funding opportunities.
- Seek stable funding in upcoming legislative session to support ongoing operations and capital expenses.
- Review bus inventory against route/passenger needs.
- Advocate for adequate capital replacements.
- Continue to develop and implement vehicle maintenance schedules.
- Review funding application process and application materials on biennial basis.



Chapter 7  
Unmet Needs/Strategies and Next Steps



## UNMET NEEDS/STRATEGIES AND NEXT STEPS

This chapter maps the relationship between the unmet needs described in Chapter 5 with the strategic initiatives, technologies, opportunities for coordination and other methods to improve transportation services for seniors and people with disabilities within Marion and Polk Counties described in Chapter 6. This chapter concludes with a set of next steps that will help guide implementation of the Coordinated Plan.

**Table 13**, below, summarizes the unmet transportation needs in the left column, and suggests a corresponding service strategy in the right column. The list of strategies should be viewed as a “catalogue” of service alternatives and do not necessarily represent programs that have existing funding sources which may be available to initiate or jump-start the strategy. Over time, SKT and the STFAC should continually refine and update the list of preferred strategies with the goal of prioritizing those most feasible to pursue, and those that would best address identified unmet needs.

**Table 13. Unmet Needs and Corresponding Strategies**

Unmet Transportation Need(s)	Corresponding Strategy(s)
<p>Transportation Service Needs</p> <ul style="list-style-type: none"> <li>• Restoration of services which had been previously cut</li> <li>• Increase service availability</li> <li>• Increased service geographic scope</li> <li>• Increase service quality</li> <li>• Increase Dial-A-Ride (DAR) services</li> <li>• Door-to-door and door-through-door paratransit service in Polk County outside of the Salem UGB area and in southern Marion County</li> <li>• Underserved groups</li> </ul>	<p>Transportation Service Strategies</p> <ul style="list-style-type: none"> <li>• Implement Phase II of the Cherriots “Moving Forward” plan (addition of weekend, holiday, extended evening service, and a student bus pass program to Cherriots fixed-route and CherryLift buses).</li> <li>• Develop service area guidelines<sup>3</sup> for SKT.</li> <li>• Identify areas with the greatest need for additional or enhanced transit services.</li> <li>• Increase capacity of existing volunteer programs.</li> <li>• Identify additional locations for service similar to the West Salem Connector.</li> <li>• Explore options for circulator, feeder route, and flexible route Dial-A-Ride services.</li> <li>• Improve regional connections between modes and service providers.</li> <li>• Explore partnerships with TNCs.</li> <li>• Explore opportunities to expand Drive Less Connect.</li> </ul>

<sup>3</sup> See Chapter 6 for a definition of service area guidelines.

<p><b>Infrastructure Needs</b></p> <ul style="list-style-type: none"> <li>• Bus stops</li> <li>• Pedestrian improvements</li> <li>• Small transit centers in communities without a transit center or major transit stop with a shelter</li> </ul>	<p><b>Infrastructure Strategies</b></p> <ul style="list-style-type: none"> <li>• Prioritize bus stops that need improvements.</li> <li>• Review existing pedestrian plans for opportunities and funding sources to improve sidewalk and pedestrian infrastructure.</li> <li>• Coordinate with local jurisdictions to identify opportunities to improve stop accessibility during roadway construction or development projects.</li> <li>• Advocate for age- and disability-friendly streets.</li> <li>• Create facilities and transit centers that provide services to seniors and people with disabilities.</li> </ul>
<p><b>Coordination and Organizational Needs</b></p> <ul style="list-style-type: none"> <li>• Coordinate services that cross jurisdictional and transit provider service area boundaries</li> <li>• Coordinate services among social service agencies, senior centers, medical facilities, employers, and other organizations to share information about local transportation options, training opportunities, and other information</li> <li>• Central dispatch for transportation services</li> <li>• Fare sharing services such as the ability to use the day pass on both the CARTS and Cherriots systems</li> <li>• Apply technological solutions to facilitate coordination efforts</li> </ul>	<p><b>Coordination and Organizational Strategies</b></p> <ul style="list-style-type: none"> <li>• Regularly review the Coordinated Plan with the STFAC to evaluate progress.</li> <li>• Coordinate with rider groups and destinations to optimize trip scheduling.</li> <li>• Coordinate with public and private sector organizations to identify opportunities for joint scheduling or sharing of vehicles.</li> <li>• Expand awareness of home delivery services.</li> <li>• Monitor Oregon Health Plan funded non-emergency medical transportation for coordination opportunities.</li> <li>• Review the CareVan program for opportunities to coordinate trips for passengers along route.</li> <li>• Encourage seniors and people with disabilities to utilize online trip planning tools.</li> </ul>
<p><b>Marketing, Customer Service, and Outreach Needs</b></p> <ul style="list-style-type: none"> <li>• Increase accountability, customer service, responsiveness, and human interaction</li> <li>• Increase the amount of information available in Spanish</li> <li>• Improve transit service branding to differentiate services (a refresh of the brands for each of the services SKT provides is expected to launch in early 2017).</li> <li>• Improved access to and availability of information, education, and outreach about the range of transportation providers and services is needed in both the urban and rural areas</li> <li>• Service advertising</li> <li>• Increase the number of volunteer drivers</li> </ul>	<p><b>Marketing, Customer Service, and Outreach Strategies</b></p> <ul style="list-style-type: none"> <li>• Develop and distribute information promoting travel options services and provide web-based and application-based information systems.</li> <li>• Improve communication and marketing efforts to increase awareness of transportation options.</li> <li>• Explore a fare assistance program for people.</li> <li>• Provide more driver training to ensure a positive, consistent customer experience by incorporating feedback from well-regarded drivers.</li> <li>• Expand travel training programs.</li> <li>• Enhance and develop travel training material.</li> <li>• Conduct outreach to increase the number and geographic locations of volunteer drivers.</li> <li>• Survey riders for feedback to improve drop-off/pick-up locations.</li> </ul>





<p><b>Technology Needs</b></p> <ul style="list-style-type: none"> <li>• CARTS vehicles need fareboxes identical to Cherris for fare integration</li> <li>• Security cameras on RED Line vehicles and some CherryLift vehicles (cameras are not currently in any CherryLift MV-1 vehicles)</li> <li>• Speaking/digital schedules at bus stops</li> <li>• Electronic signs at transit centers and major bus stops listing the next bus arrival</li> <li>• Equip buses with AVL and/or GPS systems for real-time tracking</li> <li>• Text alerts on additional transit services</li> <li>• Expand on the ongoing web-based ride reservation system pilot project with Willamette Valley Community Health and/or the West Salem Connector web-based booking system.</li> </ul>	<p><b>Technology Strategies</b></p> <ul style="list-style-type: none"> <li>• Develop and test new technology to improve service efficiencies.</li> <li>• Develop or purchase open source software to enable multiple operators to connect with a single clearinghouse for trip planning and scheduling.</li> <li>• Work towards providing real-time information for scheduled rides and same-day or on-demand scheduling.</li> <li>• Develop a centralized information system that can be accessed by people needing information on applicable transportation resources.</li> </ul>
<p><b>Capital and Funding Needs</b></p> <ul style="list-style-type: none"> <li>• Bus and equipment replacements</li> <li>• Provide high quality buses that meet a range of physical needs</li> <li>• Service additions and enhancements</li> <li>• Fare subsidies</li> </ul>	<p><b>Capital and Funding Strategies</b></p> <ul style="list-style-type: none"> <li>• Advocate for increased funding and seek out new and innovative funding opportunities.</li> <li>• Seek stable funding in upcoming legislative session to support ongoing operations and capital expenses.</li> <li>• Review bus inventory against route/rider needs.</li> <li>• Advocate for adequate capital replacements.</li> <li>• Continue to develop and implement vehicle maintenance schedules.</li> <li>• Review funding application process and application materials on biennial basis.</li> </ul>

## NEXT STEPS

After adoption of the Coordinated Plan, there are a number of logical next steps that SKT can take to move forward to implement the plan. Some general strategies, initiatives, and opportunities in the short run would include:

1. SKT staff to develop a strategy for Coordinated Plan implementation. As needed, the STFAC and public and private stakeholders will be included in order to gain feedback on the proposal for Coordinated Plan implementation.
2. SKT staff to develop and/or refine a list of funding and transit service investment priorities to help identify which of the unmet needs are most pressing, and which of the proposed strategies would best be positioned to address the unmet needs.
3. SKT staff to develop service area guidelines for all of SKT’s services. Once the guidelines are established, identify which areas are deficient, and then use the guidelines to address gaps in public transit services.
4. Begin preparing for the next funding cycles, including any needed refinements to the STF and Section 5310 funding and application processes.



## Appendix A: Summary of Stakeholder Workshops



# Salem-Keizer Transit Coordinated Transportation Plan for Seniors and People with Disabilities

Stayton and Woodburn (May 17<sup>th</sup>, 2016) - Salem and Dallas (June 1<sup>st</sup>, 2016)  
Stakeholder Workshop Summary

Four stakeholder workshops for the Salem-Keizer Transit's Coordinated Transportation Plan (CTP) for Seniors and People with Disabilities update were held during May and June 2016. In these meetings, members of the community were given the opportunity to discuss transit services within Marion and Polk counties. Invited guests included people from diverse groups: community organizers, transportation providers, senior center employees, medical facility staff, and representatives of human and health service agencies. Along with a look at current transportation systems and services, the group identified challenges, unmet needs, ideas, and strategies through the workshop. The following describes key themes and highlights from the stakeholder meetings in Dallas, Salem, Stayton, and Woodburn.



Over 50 people in total attended the four meetings. Participants included seniors and people with disabilities and representatives from the following organizations:

- American Council of the Blind
- Aumsville Community College
- Blindskills
- City of Dallas
- City of Jefferson
- City of Mill City
- City of Stayton
- Dallas Area Seniors
- Kaiser Permanente
- Marion County
- Mt. Angel Senior Center
- MV Transportation
- NorthWest Senior & Disability Services
- Oregon Department of Human Services
- Oregon Department of Transportation
- Polk County Family & Community Outreach
- Salem Area Mass Transit District
- Salem Hospital
- Salem Keizer Transit
- Salem-Keizer School District
- Shangri La
- Silverton Health
- Stayton Sublimity Chamber
- West Valley Hospital

## Key Themes and Highlights

**Expand Service.** Participants brought attention to the needs of seniors, people with disabilities, people undergoing addiction counseling, those that do not qualify for Medicaid services, and others that have limited options in mobility and access to transportation so that they can achieve a greater sense of independence. The following describes some of the unmet needs identified.

- Increasing transit frequency and/or the daily service span and providing weekend, door to door services, and connector services.
- Increased services to/from the Portland area to facilitate health-related, social, and recreational trips.
- Improved service in currently underserved and rural areas.
- A larger taxi coverage area.
- A circulator service.
- Increased on-demand services that would be available to meet basic life needs that are not solely health-related.

**Improved Infrastructure.** In rural areas, individuals are often faced with an incomplete sidewalk network and a lack of ADA accessible facilities between their origin/destination and bus stops. Participants indicated that completing the sidewalk network at key locations, improving safety at crosswalks, and installing ADA-compliant curbs would help seniors and people with disabilities access bus stops and can help them more easily board a bus. Participants noted that there is a need for additional bus shelters to improve safety and customer comfort at bus stops. Providing scheduling information at stops and developing small transit centers in communities that don't currently have them would increase ridership, rider knowledge, and customer comfort. In addition, there is a need to continue to update and maintain a high-quality vehicle fleet, and to make sure that the correct vehicle is available to serve the needs of specific riders.

**Coordination.** During an assessing of the current state of transportation services and systems, it was noted that various transportation services are funded and organized through health providers and volunteers such as Salem Health and Silverton Hospital. Participants expressed that there are good example of transportation to medical appointments for certain health providers for certain conditions, but in the broader transportation system, they create a patchwork of services that have the opportunity to be improved through coordination or communication. Participants noted similar opportunities for better coordination and communication among transit agencies, social service providers, human and health service agencies, and senior communities. Participants also noted the need to bridge the gaps (and provide connections) between services in nearby cities and counties such as Polk, Marion, and Linn Counties.

**Communication.** Health service agencies and social service participants described events, such as passengers that were dropped off at incorrect locations, which transit providers could have prevented through better communication. The agents and case managers emphasized the need

for drivers and transit agencies to communicate with them to assure the safety of seniors and people with disabilities, and to help coordinate trips (e.g. addiction programs and Shangri-La LEAP) to match available transit schedules. Participants indicated that often system users are unaware of transportation services and that transit providers could provide better marketing and outreach via websites, social media, 211, and advertising.

**Customer Service and Driver Training.** Participants from senior communities and social service providers indicated the need for increased training of bus drivers, Dial-A-Ride drivers, and volunteers. Senior participants and participants with disabilities noted the importance of courteous, compassionate, and individualized service. It was noted that in certain cases, transit providers could improve their customer service, responsiveness, and conflict resolution. Several participants named outstanding drivers that understood their needs and emphasized the demand for drivers trained in assisting seniors and people with disabilities.

**Simplified Technology.** Many groups noted that transit agencies and services use long telephone trees to direct callers. Participants were in support of removing the telephone trees for more direct person-to-person phone calls. Increased travel training services would increase the amount of information provided to seniors and people with disabilities about their transportation options and how to use transit. Simplifying technology by incorporating more human contact would make accessing information easier and more comfortable for many seniors and people with disabilities. Groups also supported the idea of distributing information through newspapers, mailing physical brochures, in addition to using tools such as social and mobile technologies.

**Real-Time Information.** Participants supported the use of digital screens or announcements at bus stops to inform riders about bus arrivals and service delays, and to improve overall system reliability. One issue identified at the stakeholder meetings was that people did not know when buses are arriving and if a bus had already passed by which would increase their trip by an additional three hours. Groups at the stakeholder meetings supported the idea of accessible real-time information at bus stops and text messaging, but noted that information through smart phones needs to be developed in a careful way as some seniors and people with disabilities have a difficult time learning to use the applications.





## Appendix B: Stakeholder Workshop Comments



## Appendix B: Stakeholder Workshop Comments

**1. Current Situation:** When thinking about the overall transportation system and services provided for seniors and people with disabilities, what is working?

- Salem Health Foundation offers taxi service to/from any of their clinics. Regardless of community, where the individual lives. They will ask if you can pay.
- CherryLift driver JJ is the Best – he is patient, kind and has wonderful interactions with staff and the persons we support.
- Trip link for medical transport
- City buses that accommodate wheelchairs
- Having a “trip trainer” for individuals with disabilities
- CherryLift is an excellent asset to our individuals who attend a day program or have a job. Having a ride to and from increases their independence.
- CARTS works well for North Canyon
- Private taxi
- Woodburn Dial-a-Ride
- There is a trainer who will ride with someone, show them how to ride one on one
- Aumsville stop has a shelter
- CARTS up the canyon service works for some, Current system working well for up canyon residents, seniors and youth
- Bus drivers and vehicles are very well kept and have been for a long time
- Urban Growth Boundary - Green line, Red line, NEMT, CherryLift
- NEMT, Silverton Health caravan, Salem health program
- Silverton Health – 400 riders/month within hospital – goes to other cities as long as folks going to Silverton hospital, works through volunteers
- Salem Hospital – need transportation services to Marion and Polk County since its services does not cover dental services. Service is funded through hospital and grant funding(Woodburn, Silverton, Stayton)
  - 2,500 rides/year
  - 50% of client base is seniors
- Salem Health does coordination and rides through taxi are providing rides through Marion and Polk Counties
- Clackamas County – volunteers go door to door picking up seniors for appointment or recreation
- Woodburn Dial-a-Ride – need to give a 24 hours notice
- Woodburn volunteer medical trips and drivers
- CARE vans
- Silverton Hospital Caravan
- Dial a ride is a window of opportunity – flex route
- Neighbors help seniors travel to their destination
- The morning CARTS service (6:30 am)

## 2. Opportunities: When thinking about the current unmet needs or challenges for seniors and people with disabilities, what comes to mind?

- ACT services in Dallas for kids coming to the courthouse 5 days a week 5-7 pm
- TripLink serves the riders who qualify for OHP but Medicare doesn't provides services for non-OHP
- Gaps in service (CARTS Route 40) and lack of evening and weekend service
  - Lack of early evening service for people attending Polk County group therapy/counseling sessions
- There are individuals that live out of the area for transportation that would like to be able to ride.
- In the program, Shangri-La LEAP on Ward Drive, it is very inconvenient that the busses at times arrive 30 minutes before expected time or 30 minutes after and at times, 45 minutes. Outings are changed because of the time changes. Also having the participants dropped off before staff walk out to greet them.
- Marion and Polk Counties
- Rural areas
- Drop off/Stop Locations
  - Currently: no door to door service
  - Need help getting to central bus stops or pick up area
  - No drop at hospital, need to walk up hill to a stop at the Safeway
- No affordable options for seniors without Medicaid
- No on demand services to basic needs
  - For seniors and disabled, need stops with shopping or/and medical. Can't picture them (being) able to transfer any distance to get to their desired destination. So stops at shopping and medical are a must and then using a community circulator to help access the main line to Stayton or Salem.
- Canyon connector
- Jefferson has no service
- No transportation to Silverton (cancer patients) from canyon
- Marion and Linn County collaboration
- No taxi service
- At chamber print off maps of bus routes for those who have a job and need to get to work
- Length of time of the canyon loop – not frequent enough, wait 3-4 hours for next ride
  - Feeling abandoned if bus is missed – have to wait 2-3 hours alone
- Marketing is needed
- Dial-A-Ride and how to use
- Confusing process – switching buses
- Need flexibility, training video on how to ride
- Deviations are needed for the elderly and disabled to get to Santiam hospital, deviations to people's homes needed
- Early morning/late evening and weekend services needed

- Need more frequency and weekend/holiday services
- Day pass should work for CARTS and Cherriots
- Service animals are sometimes not allowed on
- Better access to canyon for seniors and youth
- On-demand services for seniors and disabled
- Need door to door pick up
- Circulator services
- Currently seniors are relying on family, friends, driving when they shouldn't be
- CARTS service ends at Silverton but still gets gas in Mt. Angel, why can't services be extended to Mt Angel as well
- Woodburn transit center to downtown Portland (MAX) and Wilsonville (SMART)
- Woodburn should work closely with dial a ride with Canby to get seniors to their destinations
- Personal door to door service
- Consistency and reliability
- Volunteer program in Mt. Angel – Coordination with other services, like Silverton's Silver Trolley, funding from city to city
- Need a way from C. Meadow to a source of transportation
- East/West transit service
- CAT does not have any ADA service

**3. Transportation Service:** Considering the transportation needs and challenges of seniors and people with disabilities, please identify areas that have a need for new or improved transportation service.

- Dallas and Monmouth Senior Centers are trying to use the same bus to do excursions together. Retirement villas have a bus too. These buses are not ADA accessible and some can't use them due to this restriction
- Northwest Senior & Disability Services (NWSDS) on Kings Valley Highway
- Expanding service to people living in Falls City and the town of Grand Ronde to have bus service
- Communication/taking accountability at CherryLift. There have been a couple of "weird" incidents – for lack of a better term – that never seem to come full circle or reach a resolution/closer on it.
- Weekend services
- Pick up and drop off times closer to the scheduled times (7a-10a) (10a-1p) (1p-4p)
- reduce price of passes for those on fixed incomes (ex SSI)
- North Santiam Canyon – Upper Canyon Service
- Some areas do not have services – Jefferson in particular
- Polk County has limited service
- Santiam Hospital – no private transportation service
- Portland VA
- Need services on weekends and holidays – early am and late pm
- Use of lift to help others up the stairs
- Can't use taxi, there is \$20 drop fee for just coming out of vehicle
- Moving east to Aumsville there are no schedules, need a drop off at city hall
- Some areas need Dial a ride ~ outside of UGB
- Volunteer drivers and training
- Door to Door pickup service
- Large daily span - have transportation available throughout the day and not limited to only local options
- Allow same day requests for Dial to ride
- need service to Wilsonville/Tualatin from Woodburn
- stops need to be accessible
- Dial-A-Ride Services
- Mt. Angel to Kaiser Permanente
- Services to Point/Amtrak, Offices from Transportation Center, Mt. Angel to Salem and medical services
- Need services to go shopping
- Mt. Angel does not have a volunteer service and DAR
- Silver Trolley could fill gap between Mt. Angel and Silverton
- Mirror West Salem connector services – opportunities

#### 4. Infrastructure and Associated Improvements (sidewalks, bus shelters, pedestrian crossings, curb cuts): What are the current infrastructure needs for seniors and people with disabilities?

- For those hard of sight some sort of speaking schedule at bus stops?
- Bus stops in areas that are level and accessible
- Shelters at all bus stops
- Rural areas typically have disconnected sidewalks
- Main streets are highways and are hard to cross
- Gravel shoulders needed
- Lease land off highway for small towns to develop a small transit center (Jefferson ,Fall City)
- Need additional stops between DHS and Safeway
- Currently drops people off at 1st, not in Safeway lot crosswalk which is further north
- Crossing Highway 22 – bridge has no sidewalk and small shoulder
- Shelters and bus stops needed in Stayton and Mill City
- Gas station at 1st and Washington will go up for auction next week; city/county won't pursue this option
- Gates has a nice bus shelter
- Topography challenges – hills and distance
- Wheelchair accessibility at every stop
- CCC not a great stop
- No accessible means to get over the rail road tracks
- Woodburn Park N Ride needs bus shelter and ramps
  - Path to transportation center is not direct
  - Dangerous/difficult to get to
- Reliability of stop locations not accessible – use DAR instead
- Silverton: Ross/GA: stop in parking lot → Bowtie Lane near Oil
  - Opportunity for a shelter, low traffic
- Grass at bus stops
- No curbs – difficult to step onto bus without lift
- Transit Center – marketing
- Information not being relayed well, need to make information accessible but focused
- Path sidewalk strips by bus stops by Walmart (Woodburn)
- Bus stops in Mt. Angel

**5. Coordination and Organization:** In your experience, what specifically are the needs for improved coordination and organization between and among social service providers and transit providers? Examples are welcome.

- Education on CARTSbus service
  - Articles in local Polk County weekly newspaper about CARTS describing routes and how to use them
  - Leaflets at senior centers and churches
- If a person served is dropped at the wrong home, or is in an accident while on CherryLift – this must be communicated with centers, hospitals, social services
- Coordinating special education trips with school district
- Technology to coordinate needs
- List for parents, faculty, and staff of transit services needs to be made available
- Homeless connects events are sometimes held on weekends and without weekend service, clients cannot get to those events
- Military stand downs are another example
- Transit from Salem to Portland is a challenge
  - An all day journey sometimes
- Patchwork of services – need to centralize services
- Need to inform hospitals, clinics, CMS when information changes
- Need an express line to other cities like for meals for seniors
- Cities in other counties (Linn) lack funding or need to coordinate/partner with other counties
- There are no service across the water
- Need centralized dispatch
- Coordinate with hospitals
  - Santiam Hospital – case managers
  - Transit needs to reach out in meaningful dialogue
- Better Communication services - Seniors do not understand what is available
- Reach out to those with limited mobility and impairment - many legally blind seniors have trouble riding
- Coordination between social service providers and transit providers - especially to assure transit is adhering to performance standards
- Express routes miss stops aren't as frequent. Need better coordination between cities
- Coordinate with senior centers, they have their own shuttles but with a strict schedule



**6. Technology** (GPS, real-time information, communication): What are some of the most pressing technology gaps in providing transportation services to meet the needs of seniors and people with disabilities?

- Digital/Speaking schedules at bus stops
- When buses are running late, especially city buses, this is not communicated. I have seen other cities that have LED/Electronic signs that alert the rider of the next bus arrival and is updated to reflect late buses.
- Simplify the telephone tree to a single call
  - Talking with a human who you can understand is also important
- Speedy simple service is key
- Facebook/twitter should be used for advertising
- 211 Calling, paper schedules, newspapers, radio, personal contact
- List of users – send physical brochure
- Websites
- Geolink locator for the status of bus
- Text
- Mobile app
- Smart phone + how to use the app video
- Seniors/older disable folks might not find technology handy
- Seniors use a buddy systems currently, a program could be set up to help seniors access information and stops
- More opportunities for information
  - Kiosks
  - Information – when are buses coming
  - Bus shelter
  - Focus is important – not just spread it around
  - Bus drivers important – driver training and more informed, give them updated schedules
  - Customer service dispatch
- Mt. Angel NEMT service
- Need application and/or website to reserve rides
- A way to access Dial-A-Ride services without a phone
- Woodburn transit station missing from google maps
- Better advertisement of services

**Looking Ahead.** *This section sets the stage for carrying the discussion into the next steps of the planning process.*

**7. Strategic Guiding Principles:** The existing 2009 CTP did not identify a set of strategic guiding principles. Development of guiding principles is an important component of the CTP as it helps to guide future strategic investments. The proposed guiding principles are shown below. What are your comments on these draft guiding principles and what would you modify or add?

- Maintain/improve/expand existing services and shopper shuttles, increase capacity/hours, improve service quality, avoid service reductions, in both urban and rural area
- Provide for adequate capital replacements and maintenance of vehicles and other fundamental requirements to provide service.
- Provide medical transportation for non-Medicaid individuals in rural Marion/Polk Counties
- Consider cost-effectiveness in making funding decisions (such as \$ per ride, % match), but balance that with the need to provide accessibility throughout Marion and Polk counties.
- Strive for strategic and equitable distribution of funding to address the needs of the region's seniors and people with disabilities.
- Implement new and innovative initiatives related to technology and collaborative partnerships to improve service to underserved communities and people.
- Enhance rider experience and sense of dignity by being sensitive and attentive to the varied needs of individuals and by emphasizing a customer service model.

**8. Ideas and Strategies:** Are there any new or innovative strategies or ideas that we should consider to improve the existing transportation system for seniors and people with disabilities? What strategies should be added to the plan?

- Travel training is needed at senior centers and retirement homes in Dallas, Monmouth, and Independence
- Pioneer Village or Kingwood West in West Salem would be good candidates
- A shelter stop near the courthouse, senior center, and library would be useful.
- The Polk County Resource center could be used for education
- More frequent services (extended hours/weekend)
- More “connector” type services
- Electronic signs with up to the minute accurate arrival times
- Volunteer driver programs to get people to the bus stop in smaller communities
- Centralized dispatch system – remove patchwork of services
- Service to Salem downtown (transit hub)
- Better stop at Winco
- Medical and shopping
- Not work as much
- Use senior center, recreation, social needs
- Charter buses - not really an option
- Salem – eastside transit center at Costco location up Lancaster
- Education is needed in a big way for CARTS
- Deviations make the bus unpredictable
- Shopper shuttles – Black Friday
- Age in Place: Woodburn does this well
- Street car service from Woodburn to Mt. Angel to Silverton
- Caravan – not focus on Silverton and Woodburn
- Amtrak in Woodburn
- KP in California provides rides for people
- No cuts for Jimmy’s route 25
- Travel training – CARTS needs in service trainers to be one on one with customers and friendly to customers
- Non emergencies from Mt. Angel
  - Shopping too
- Ride Connection training
- City of Woodburn travel training

## 9. Is there anything else you'd like to add?

- CARTS serves some commuters to Salem and Western Oregon University, and people without cars. The system in Polk County has the capacity to serve more of the general public
- quality drivers and buses
- Education - For Stayton, include travel training - definitely need more help for seniors getting comfortable to transit and how to use
- Need for rural demand responsive services, needs to be stronger
- Need for more information about existing service
- Current level of CARTS service is lifeline service. The canyon needs more expending evening and morning priority over weekends.
- Seniors want access to social sites like senior centers or pool or meal sites not just medical centers
- Coordination/cooperation between Linn and Polk Counties
- Shopping isn't as important since family can take care of those seen
- To Salem – goes downtown and then to another bus – Winco – Walmart – hospital/specialties – senior center – meal site – social aspects
- To many transfers/cross lines + timing
- Chartered stops
- East side transit center?
- It's refreshing to see the interest from CARTS/Cherriots for information from all communities
- Suggestion – connect with “service integration teams” in areas to talk with providers, clergy schools, and leaders in the community – contact Herman Boes (sp?) Salem leadership foundation
- Dial to ride issue - seniors would call asking for a ride, but services were busy and senior was told that people with disabilities came first
- Effectiveness of routes needs to be considered
- The cost of not providing a service

Appendix C: People Aged 65  
Years and Older  
Demographic Data



## PEOPLE AGED 65 YEARS AND OLDER DEMOGRAPHIC DATA

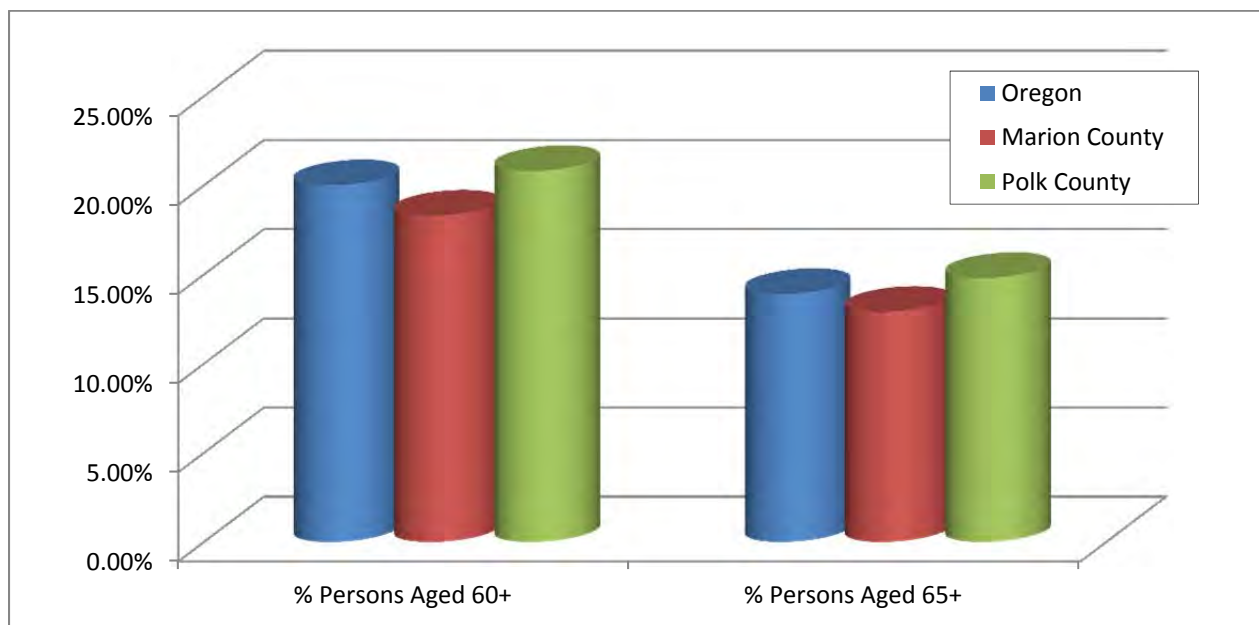
This appendix contains supplemental demographic data for seniors 65 years and older. **Table C1** and **Figure C1** provide a “snapshot” of seniors 60 years and older and 65 years and older.

**Table C1. Population Characteristics**

	Total Population <sup>1</sup>	% Persons Aged 60+ <sup>1</sup>	% Persons Aged 65+ <sup>1</sup>
Oregon	3,831,074	20.0%	13.9%
Marion County	315,335	18.3%	12.9%
Polk County	75,403	20.8%	14.8%

(1) U.S. Census, 2010, Table DP-1.

**Figure C1. Population Characteristics**



Source: U.S. Census, 2010, Table DP-1.

### Older Adults

**Figure C2** provides a population density map of people aged 65 and older, in Marion and Polk counties. It shows that high concentrations of seniors are in the Salem-Keizer area, where the population is denser in general. Outside of the Salem area, the largest concentrations of seniors are in Dallas and Woodburn. **Table C2** lists the percentage of the population aged 65 and older, for individual cities in each county. Cities where the share of older adults is greater than the counties as a whole are shown in bold.

**Table C2. Adults Aged 65+ by City**

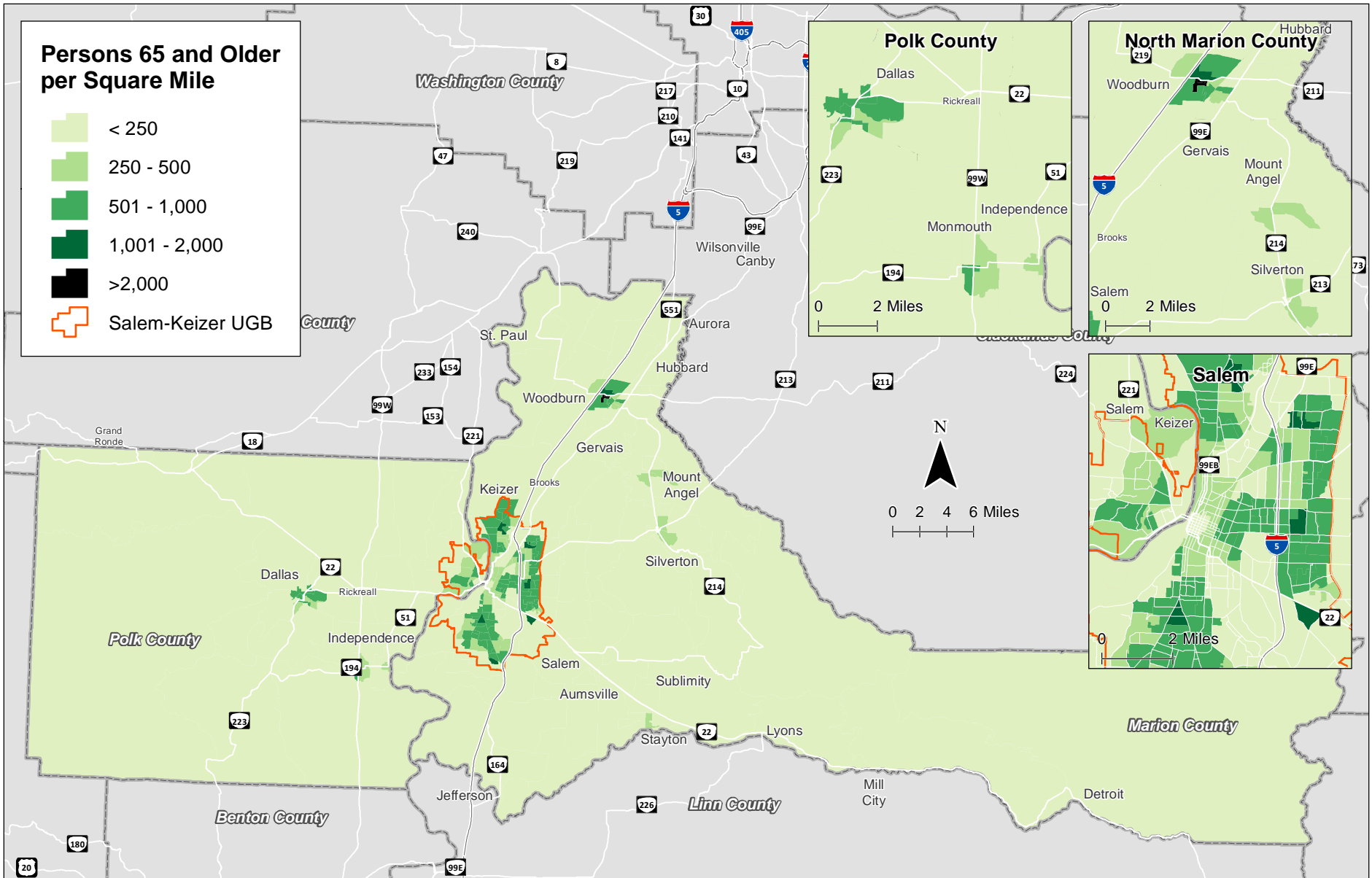
City	2010 Population Age 65+ <sup>1</sup>	% Age 65+
Salem	18,560	12.0%
<b>Keizer</b>	<b>4,850</b>	<b>13.3%</b>
<b>Woodburn</b>	<b>3,710</b>	<b>15.4%</b>
<b>Dallas</b>	<b>2,740</b>	<b>18.8%</b>
Hayesville <sup>2</sup>	2,090	10.5%
Four Corners <sup>2</sup>	1,800	11.3%
<b>Silverton</b>	<b>1,240</b>	<b>13.5%</b>
Stayton	990	12.9%
Monmouth	900	9.4%
<b>Sublimity</b>	<b>780</b>	<b>29.0%</b>
Independence	750	8.7%
<b>Mount Angel</b>	<b>690</b>	<b>20.9%</b>
<b>Turner</b>	<b>340</b>	<b>18.3%</b>
Aumsville	300	8.4%

City	2010 Population Age 65+ <sup>1</sup>	% Age 65+
Jefferson	290	9.4%
<b>Mill City<sup>3</sup></b>	<b>250</b>	<b>13.5%</b>
Hubbard	210	6.6%
Willamina <sup>3</sup>	200	9.8%
<b>Falls City</b>	<b>150</b>	<b>16.3%</b>
Aurora	100	10.8%
<b>Gates</b>	<b>100</b>	<b>21.9%</b>
Donald	90	9.7%
Gervais	90	3.7%
St. Paul	50	12.4%
Scotts Mills	40	11.8%
<b>Detroit</b>	<b>30</b>	<b>15.8%</b>
<b>Idanha</b>	<b>20</b>	<b>17.9%</b>

(1) U.S. Census, 2010, Table DP-1. (2) This unincorporated area of Marion County lies within the Salem-Keizer Urban Growth Boundary. (3) This city is not entirely within Marion and Polk counties. Cities where the share of persons aged 65 or older is greater than the counties as a whole are shown in bold.



H:\projects\16892 - ODOT Region 2 Coordinated Plans\GIS\Polk\_Marion\_Maps\2 Population Density 65 and Older.mxd - jsmmerville - 11:46 AM 3/16/2016



Population Density of People Aged 65 Years and Older (by Census Block Group)

Figure A2



Appendix D: Social Service  
Agency Descriptions



## PUBLIC PROVIDERS

### Disabled American Veterans Transportation

*VA Portland Health Care System, Veterans Transportation Program*

*Hours of Operation: 5:30 am – 3:00 pm 3710 SW US Veterans Hospital Rd, Portland, OR 97239*

(503) 721-7804 Disabled American Veterans (DAV) offers transportation on weekdays to the Veterans Hospital in Portland. Services may be expanding to offer rides within Salem in summer of 2016. Transportation is provided by a van at designated stops in the Portland metro area, Salem,, Keizer, Brooks, Woodburn, Wilsonville and Aurora. The service is provided free of charge and is available only to veterans for VA sanctioned appointments. A four-day minimum advance reservation is required.

The vans hold up to 8 passengers each, but are not wheelchair accessible. Pickup is scheduled per city from a designated pickup location, and the service uses all volunteer drivers. The Salem pickup locations are at the park-and-ride lot at Market and Hawthorne Streets at 7:30 am and the Salem Community Based Outpatient Clinic on McGilchrist Street at 7:00 am. The pickup locations in Keizer are at the Safeway on River Road at 7:40 am and the Keizer Station park-and-ride lot at 7:45 am. The van arrives in Portland by 9:00 am and heads back to Salem when the last appointment is completed or by 3:00 pm, whichever comes first.

Rides are only available when volunteer drivers are available, and this is one of the barriers to providing service. All maintenance is provided outside the hospital by maintenance contractors. Appointments are scheduled from the Portland VA Hospital.

The DAV transportation program service has not coordinated with other agencies in the past.

### Marion County Housing Authority

*2645 Portland Rd NE, Suite 200, Salem, OR 97301*

*503-798-4170 HousingAuthority@co.marion.or.us*

The Marion County Housing Authority's mission is to provide safe and affordable housing to low income families in Marion County. The program currently oversees multiple apartment complexes in Woodburn, Mt. Angel, Silverton, Stayton, Aumsville and Jefferson. The Authority also administers a voucher program, under contract with the US Department of Housing, that assists residents with paying their rent for the areas of Marion County which are outside the Urban Growth Boundary of Salem. Although the Housing Authority currently does not provide transportation for residents, they are interested in cooperation opportunities between transportation services and their organization, similar to the type of cooperation they currently have with health services.

Some housing clients currently use CARTS but could better utilize the service if public transportation were more convenient and if a more proactive program to educate residents about the availability of services were implemented. The Salem-Keizer Travel Training program has trained a number of housing clients and other low income residents on how to use CARTS. Groups of clients ride CARTS with the Travel Trainers to a destination (such as the Salud Medical Center in Woodburn), learning the skills needed to ride the bus. The greatest obstacle to using the currently available resources is unfamiliarity with options and the lack of connections from housing to other services.

### Marion County Retired Senior Volunteer Program (RSVP)

*Beth Faulhaber*

*270 Montgomery St., Woodburn, OR 97071*

*(503) 982-5388*

*beth.faulhaber@ci.woodburn.or.us*

The Retired Senior Volunteer Program (RSVP) recruits, interviews and links volunteers 55 years and older with opportunities in the community. RSVP volunteers work in schools, hospitals, museums, the arts and environment, food banks and other nonprofit agencies throughout the region.

One of the key volunteer needs in Marion County is drivers for the volunteer Dial-a-Ride service coordinated through Woodburn Transit. The Dial-a-Ride program arranges for volunteer drivers to take elderly Woodburn residents and those with disabilities to medical appointments in all areas between Portland and Salem. Volunteer drivers use their personal vehicles and are reimbursed for their mileage at the federal rate. Requests for reservations must be made at least one day in advance and can be made by calling the City of Woodburn at 503.982.7433. There is no charge for the service and drivers are not permitted to accept tips; however donations are accepted for the service.

The RSVP program receives partial federal funding through Senior Corps, which is administered by the Corporation for National and Community Service (also oversees AmeriCorps and Learn and Serve America).

### Northwest Senior and Disability Services

*Jeff Brunner*

*3410 Cherry Ave. NE, Salem, OR 97303*

*(503) 373-0260*

*jeffory.brunner@state.or.us*

Northwest Senior and Disability Services provides assistive services to seniors and persons with disabilities. Services include adult protective services, in-home care, meal programs, employment services, counseling, volunteer opportunities, and medical and financial assistance. The organization does not offer transportation services to clients but refers them to transportation brokerages like

TriPLink. In general, people who do not use public transportation use their own personal vehicles and mileage is reimbursed for medical trips through the Medical Assistance Program.

Clients who require public transportation need door-to-door and timely service to and from their homes in rural locations. Major obstacles to arranging transportation for clients have been the cost to the client, resistance to using the available options, and the unfamiliarity with the available choices.

Northwest Senior and Disability Services has not coordinated transportation with any agencies.

## Oregon Commission for the Blind

*Deb Marinos*

*PO Box 295, Silverton, OR*

*(503) 873-6627*

*deb@open.org*

The Oregon Commission for the Blind provides training to visually impaired persons to assist in finding employment, independent living, and self-sufficiency. The Commission does not currently use transportation directly but assists clients in travel training so they can use the existing services independently.

The greatest obstacles for their clients have been the cost of transportation, unfamiliarity with services, services not being able to meet the clients' needs, and inaccessible information like websites and schedules. Clients need door-to-door services and safer environments around bus stops in order to use public transportation more often.

The Oregon Commission for the Blind has coordinated with agencies such as CARTS, Cherriots, and Wheels in the past by arranging special trip contracts with them. The major benefit of these efforts has been the reduction of effort spent on meeting the transportation needs of clients. Obstacles that have impeded coordination have been when agencies refuse to schedule in advance or are booked with subscription trips closer to the trip time.

## Oregon Health Authority

*Lynne Saxton 503-947-2340 lynne.saxton@state.or.us*

The Oregon Health Authority (OHA) provides coordination assistance and contracts for Medicaid non-emergent medical transportation (NEMT) brokerages, senior and disabled non-medical transportation, and vocational rehabilitation ride vouchers. OHA pays for transportation for their clients, with rides being booked through the TriPLink Call Center. Transportation is scheduled with the most appropriate and cost-effective means that meets a client's needs, including the following types of transportation services: bus (tickets/pass); wheelchair van/bus; taxi or sedan; secure transport; stretcher car Staff also provides transportation for foster children and mileage vouchers to clients for medical trips. In

addition to using the above services, OHA clients use Veterans' Affairs transportation as well as the RSVP volunteer driver program, although these are not coordinated for clients through OHA.

A number of obstacles stand in the way of arranging transportation for OHA clients including the cost to the agency, client resistance to using the available options, unfamiliarity of the options available, and the current choices not meeting clients' needs. To be able to use public transportation, OHA clients require the following options to be available to them:

- Free service
- Door-to-door service
- Wheelchair accessible
- Provision for an escort
- Boarding and alighting assistance
- Safer areas around bus stops and better amenities
- Additional education

### Resource Connections of Oregon

*Russell Johnson*

*1775 32<sup>nd</sup> Place NE, Suite A, Salem, OR 97301(530) 485-2510 x128*

*rjohnson@resourceconnections.org*

Resource Connections of Oregon (RCO) is a non-profit corporation which helps adults with developmental disabilities to live independently. The organization uses personal agents who work with each customer to provide a self-directed plan including services such as finding supported employment, living support, family training, and securing non-medical transportation. RCO distributes federal and state funding under the direction of the customer to assist in the improvement of the customer's quality of life and independence. The organization operates in Marion, Yamhill, and Linn counties with about 720customers.

RCO customers use Salem-Keizer Transit, CherryLift, and CARTS to access services. RCO staff helps customers pay for the transportation. The biggest obstacles to arranging transportation are the customer's resistance to using the available transportation or that the options available are not feasible and do not meet the customer's needs. RCO has not entered into any coordinated efforts with any transportation services.

### Shangri-La Corporation

*Brianna Weaver*

*4080 Reed Rd. SE, Suite 150, Salem, OR 97302*

*(503) 581-1732*



Shangri-La is a non-profit human services organization that serves people with disabilities and disadvantages so they may recognize and achieve their full potential.

Shangri-La's primary service lines include daily living supports and employment for people with developmental disabilities, community transition supports for people with mental illness, and job search and family management services for low-income and at-risk families in Marion, Polk and Yamhill counties. Shangri-La has over 100 individuals in Marion County with developmental disabilities that use Cherriots, CherryLift, and RED Line. Shangri-La also provides transportation to persons served via an in-house fleet of vehicles. Funding for the operation comes from contracts with State and County agencies, revenues from the subsidiary businesses, private donations, and grants.

### West Valley Hospital Connections Van

*Jennifer Broadus* 525 SE Washington  
Dallas, OR 97338  
(503) 917-2024

The Connections Van program provides free curb-to-curb transportation for residents of Polk County to Salem Health West Valley medical services located in Dallas and Monmouth. At least 80 percent of the patients using this service are seniors and people with physical disabilities. The service is offered Monday through Friday and uses volunteer drivers and schedulers, with the exception of one part-time driver-coordinator. The service has been in operation since 2001 and has one passenger van with a wheelchair lift and one wheelchair-accessible cutaway-style bus.

### Silverton Hospital CareVan

*Kay Seiler, Volunteer Services Manager*  
342 Fairview St., Silverton, OR 97381  
(503) 873-1786  
kseiler@silvertonhealth.org

The Silverton Health medical transportation program, CareVan, provides safe, reliable door to door ambulatory and wheelchair rides to and from medical appointments at Silverton Hospital and its affiliated clinics, providers, services and programs. Rides are available from private residences or pre-arranged locations within the hospital's service area from 8:30am to 4:00pm, Monday-Friday. Rides are scheduled in advance with a reminder call placed to the client 24 hours in advance of the trip. Rides are provided by two paid drivers that serve our Woodburn and outlying areas, Silverton area rides are provided by a team of committed volunteer drivers and dispatchers. All rides are complimentary, however donations are cheerfully accepted! To schedule a ride, contact (Woodburn) 503.873.1722, or (Silverton) 503.873.1784.

## TripLink Call Center

*SueAnn Coffin*

3140 Del Webb Ave. NE, Salem, OR 97301

(503) 588.2424 ext. 7588

[SueAnn.Coffin@cherriots.org](mailto:SueAnn.Coffin@cherriots.org)

Through the TripLink Call Center, Salem-Keizer Transit (SKT) provides Non-Emergent Medical Transportation (NEMT) to eligible Oregon Health Authority and Coordinated Care Organization (CCO)/Willamette Valley Community Health (WVCH) clients traveling to covered medical services. TripLink Call Center will verify eligibility prior to providing services. This includes determining if the client is in a managed care plan.

NEMT transportation is provided 24 hours a day, 365 days a year. TripLink Call Center hours: Monday through Friday 6 am to 7 pm and Saturday 10 am to 4 pm. Salem-Keizer Transit contracts with approximately 22 providers to provide NEMT transportation to eligible clients.

NEMT Providers have a variety of vehicles to transport clients with mobility devices, walkers and canes. Stretcher vehicles are also available. SKT also contracts with secured transport companies. Providers follow all Americans with Disabilities Act (ADA) laws and best practices. Service animals are welcomed aboard under the control of the client. Personal Care Attendant (PCA) also travels with the NEMT client.

The TripLink Call Center can book NEMT trips up to 30-days in advance of the medical service. Same day trips are approved as space is available. Trips outside the Marion and Polk counties area are approved by Oregon Health Authority or Willamette Valley Community Health.

## PRIVATE PROVIDERS

Private transportation options in the area include rail service provided by Amtrak, regional bus service provided by Greyhound, HUT Airport Shuttle to Portland Airport, the casino shuttle, and a number of taxi services.

### Amtrak

Amtrak is the nationwide rail service allowing residents to travel within Oregon and across the nation. Amtrak service in Marion and Polk counties is only available in Salem. The Salem Amtrak Station is located at 500 13th Street NE and is served by Cherriots Routes 8 and 8A. Two Amtrak routes serve Salem: the Amtrak Cascades and the Coast Starlight.

The Amtrak Cascades connects the Pacific Northwest from Vancouver, Canada to Eugene, Oregon. Eleven northbound and eleven southbound trips depart from Salem at various times to various destinations using a combination of rail and Thruway bus connections. Some trains and buses run daily while others run Monday through Friday or Saturday and Sunday only.

The Coast Starlight provides service along the west coast from Vancouver, Canada to San Diego, California. Only one northbound and southbound trip is offered daily.

## Greyhound

Greyhound provides nationwide bus service. Greyhound is available in Salem and Woodburn. The Salem Greyhound Station is located at 500 13<sup>th</sup> Street SE, less than a quarter mile away from the Salem Transit Mall served by Cherriots routes and CARTS. Service is available from Salem and Woodburn to Corvallis and Portland. Four daily northbound and southbound trips are available from the Salem Station. Only two trips in each direction stop in Woodburn.

## HUT Airport Shuttle

HUT provides connections from Salem and Woodburn to Portland International Airport. The shuttle operates seven days a week and provides service every two hours from 3:15 AM to 11:15 PM in Salem, departing at the Red Lion Hotel on Market Street NE. Service from the Best Western Hotel in Woodburn on Newburg Highway is available every two hours from 3:30 AM to 11:30 PM seven days a week. The fare is \$36 per adult one way from Salem and \$33 per adult one way from Woodburn. The trip takes approximately an hour from Woodburn and an hour and 15 minutes from Salem.

## Spirit Mountain Casino Shuttle

Spirit Mountain Casino operates casino shuttles from numerous departure points in and around Portland, Salem and Vancouver to their facility seven days a week. Cities served include Salem, Keizer, Woodburn, Wilsonville, Albany, Corvallis and the greater Portland area. Round trip service is free, but you must be a Coyote Club Member (or agree to sign up when you arrive) to ride the bus. Cities served by the shuttle change by day of the week.

Depending on the day of the week, the casino operates up to five large over-the-road coaches. The service is contracted out to a private charter company, who operates the service and provides vehicle maintenance for the casino.

The shuttle does not coordinate with any current services, according to casino staff.

The Confederated Tribes of the Grand Ronde use tribal transit dollars to fund Cherriots Route 2X between Salem, Rickreal, and Grand Ronde with eight daily round trips. This service is provided primarily for casino employees and is unaffiliated with the Spirit Mountain Shuttle.

## Taxis

- The larger taxicab companies in Marion and Polk Counties are based in Salem and provide some service to smaller communities without taxicab service. Recently, two small taxicab companies have started business in Woodburn and Silverton. All taxicab companies listed

provide service to Salem, Portland, as well as the rest of Marion and Polk counties.  
Willamette Valley Yellow Cab: Based in Salem, has wheelchair accessible vehicles available

- Amanda's Taxi: Based in Salem
- Diamond Cab: Based in Salem
- Affordable Taxi: Based in Salem
- Silverton Taxi: Operates one cab
- Squirrels Taxi Service: Operates one cab in Dallas, Monmouth, and Independence
- Affordable and Cachanillas Taxi: Based in Woodburn

Appendix E: Salem-Keizer  
Transit Vehicle Fleet Data



## SALEM-KEIZER TRANSIT VEHICLE FLEET DATA

**Table E1. Cherriots Vehicle Fleet**

Vehicle Type	# Vehicles	Year in Service	Passenger Capacity	End of Service Life
Orion VII	12	2002	35	2014
Orion VII	12	2002	40	2014
Orion VII – Com	2	2004	40	2016
Orion VII	8	2005	40	2017
Gillig	10	2008	35	2020
Gillig	4	2008	40	2020
Gillig	8	2011	40	2023
Gillig	4	2011	35	2023
Gillig	4	2012	35	2024

Source: Salem-Keizer Transit

**Table E2. CARTS Vehicle Fleet**

Vehicle Type	# Vehicles	Year in Service	Passenger Capacity	Vehicle Mileage <sup>1</sup>	End of Service Life
Ford E-450	2	2009	25	41,000, 72,000	2015
Ford E-450	1	2010	25	21,000	2016
Ford E-450	2	2012	24	1,000, 1,000	2017
Freightliner Starcruiser	2	2003	34	249,000, 281,000	2013
Champion FB-65	2	2004	34	265,000, 312,000	2015
Freightliner/CTS	2	2006	36	188,000, 140,000	2016
Freightliner/Champion	1	2006	36	148,000	2016
Champion CTS	2	2010	35	39,000, 35,000	2020
International hybrid	1	2010	35	16,000	2020

(1) Data rounded to the nearest 1,000 miles. Source: Salem-Keizer Transit

**Table E3. CherryLift Vehicle Fleet**

Vehicle Type	# Vehicles	Year in Service	End of Service Life
Ford Starcraft Allstar	2	2002	2007
Ford Champion Challenger	6	2007	2012
Ford Elkhart ECII	5	2008	2013
Ford EK Coach	2	2009	2014
Ford StarTrans	4	2010	2015
Ford StarTrans	17	2011	2016
Chevy Uplander	1	2008	2013
Arboc	4	2013	2018
AM General	3	2014	2019
AM General	4	2015	2020

Source: Salem-Keizer Transit

**Table E4. RED Line Vehicle Fleet**

Vehicle Type	# Vehicles	Year in Service	End of Service Life
Ford GCII	2	2007	2012
Ford GCII	1	2010	2015
Entervan	2	2010	2014

Source: Salem-Keizer Transit



## Appendix F: Mobility Management Work Plan





# **Mobility Management Work Plan**

**7/1/15-6/30/17**

Salem-Keizer Transit's Mission Statement for Mobility Management:

Mobility Management: Mobility management projects are planning, training, and management activities for improving coordination among public transportation and other transportation service providers, including human service agencies and private providers. These projects build coordination among existing public transportation providers and other transportation service providers, and increase service options that would not otherwise be available for seniors and individuals with disabilities.

We intend to work towards meeting our mission by focusing efforts and attention on the following goals;

1. Promote Accessibility and Livability
2. Focus on the Individual
3. Improve Coordination
4. Foster Education and Awareness



Promote Accessibility and Livability:

Promoting accessibility and livability was determined to be a priority for Salem-Keizer Transit because we believe that ALL community members should have accessible transportation so that the community is not limited in the locations they can travel to. Livability is about having transportation options that ensure that all community members can travel not only where they need to but also where they want to. Providing accessible transportation is imperative so that accessibility is not a barrier to traveling where community members need and want to go. Travel Training is a program that Salem-Keizer Transit provides, free of charge to the trainee that enables community members to utilize the transportation services offered and provided within the community.

The performance measures we have identified will show progress towards the goal of promoting accessibility and livability are: the number of people transitioned from paratransit to fixed route; the number of trip planning interactions from the outreach specialist as well as the Customer Service Representatives; website trip planner hits; fixed route ridership numbers; and the outreach event report of the number of individual contacts made at each outreach event.



Goal:	Objectives:	Outcomes:	Who:	Performance Measure:	Cost:
<b>Promote accessibility and livability</b>	Transition individuals from paratransit services to fixed route services	Increase # of individuals to access their community more independently	Outreach Specialist	# of people transitioned from paratransit to fixed route	A. \$8,060 per year
	Provide custom trip planning for individuals to enable use of the fixed route services	Customer Service provides custom trip planning for better responsiveness and improved customer service.	Outreach Specialist, Customer Service Representative (CSR), and Marketing Department	# of trip planning interactions (% customer service calls, number of travel training trip planning interactions)  website trip planner hits (from marketing)	B. \$53,766 per year
	Promote transportation services that are accessible, lead to livable communities and improve quality of life	Increase in fixed route ridership	Transit hosts, CSR's, Mobility Coordinator, Outreach Specialist, and Marketing Department	Fixed Route ridership numbers (planning department)	C. \$18,598 per year
		Greater mobility for seniors and individuals with disabilities; access to jobs, essential shopping, and recreational activities are provided	Planning, CSR's, Marketing, Outreach Specialist, Mobility Coordinator, CS Manager, Contracted Transportation Manager	Outreach event report of # of individual contacts	D. \$ 3,520 per year



### Focus on the Individual:

Focusing on the individual was determined to be a priority for Salem-Keizer Transit because providing transportation services to ALL is a priority rather than just the majority of the population. Not all people can access one type of transportation option therefore Salem-Keizer Transit commits to offering a variety of transportation options so that everyone within the community has the ability to travel. In addition to providing transportation options for everyone within the community, Salem-Keizer Transit believes that providing excellent customer service supports the goal of focusing on the individual. Transit Hosts are a wonderful program where the individual is focused on in addition to the CherryLift/Paratransit Eligibility Office. Both programs offer individualized services. The Transit Host is available to assist riders from one bus to another on the transit center as well as answer questions. The CherryLift/Paratransit Eligibility Office makes determinations from an individual's functioning ability to access the fixed route buses.

The performance measures we have identified that will show progress towards the goal of focusing on the individual are: daily data collected from the Transit Host's interactions; the number of trips provided on RED Line from the monthly report; and the number of Transit Hosts interactions on a quarterly basis. The RED Line monthly report will provide a way of tracking trips to individual riders on alternative modes of transportation focused on seniors and people with disabilities to ensure Salem-Keizer Transit is providing transportation options that are accessible for all.



Goal:	Objectives:	Outcomes:	Who:	Performance Measure:	Cost:
<b>Focus on the Individual</b>	Provide and promote transportation services which are specific to individual's needs	Passengers are assisted in trip planning, information about fixed route service and assisted to correct route at the transit mall	Transit host, CS Manager	Daily data collected of transit host interactions, CS Manager	E. \$17,472 per year
		Eligibility determinations based on individual's functional ability that match each person to a coordinated resource	Senior Mobility Assessment Evaluator	# of individual eligibility determinations based on interviews/assessments	F. \$ 3,497 per year
	Increase RED Line utilization as a transportation option	Increase RED Line Dial-a-Ride ridership for seniors and people with disabilities with preference for medical appointments	Call Center CSR, Customer Service CSR, Mobility Coordinator	# of trips provided by monthly report	G. \$ 4,628 per year
	Focus on the quality of customer service	Better/more availability of information available to potential customers	Transit Hosts	# of transit host interactions per quarter	H. \$23,400 per year



### Improve Coordination:

Improving coordination was determined to be a priority for Salem-Keizer Transit because the act of coordination and improving is vital to the success of a mobility management program in addition to agencies within a community as well as the members of the community. Improving coordination helps to prevent duplicative services, programs, efforts, initiatives, etc. within a community and/or region. Ultimately, improving coordination saves resources that could otherwise be utilized in other areas. Salem-Keizer Transit seeks opportunities for coordination improvement in both transportation as well as with human service agencies, communities located outside of the Urban Growth Boundary, and businesses. Currently, the coordination of transportation includes surrounding cities of Salem-Keizer, the Confederated Tribes of Grand Ronde, Marion County Developmental Disabilities and Services, contractual providers for N.E.M.T. transport, and Salem Hospital.

The performance measures that we have identified that show progress towards the goal of improving coordination are: the number of partnered community events; the ridership numbers on the 1X and 2X; the number of transit providers that Salem-Keizer Transit's transportation services connect to; Salem Hospitals Grant Report on the number of scheduled trips to medical appointments; and documentation of the C.C.R.C. meeting documentation notes.





Goal:	Objectives:	Outcomes:	Who:	Performance Measure:	Cost:
<b>Improve Coordination</b>	Establish partnerships to coordinate transportation services; programs, and projects	Increase coordination by reaching out to community partners which will promote coordination of transportation services	Mobility Coordinator	# of partnered community events  ridership numbers on 1X and 2X  # of transit providers participating (RED Line, CherryLift, Cherriots, CARTS, CAT, YamCO, Coastal connector, Valley Retriever, POINT  Salem Hospital report (STF grant) # of riders, # scheduled trips, report on progress	I. \$23,998 per year
	Improve services coordination	Create and maintain an inter-service communications meeting	Mobility Coordinator	Documentation of the CCRC meeting notes	J. \$2,548 per year



### Foster Education and Awareness:

Fostering education and awareness was determined to be a priority for Salem-Keizer Transit because without awareness of the transportation services and programs that are available there would be less utilization. Education on the transportation services available is vital so that people come to learn that they can access the available transportation which can broaden and open up a person's world. So many community members think that a person must be able to navigate stairs in order to board a fixed route bus or are unaware that the buses have a talking feature so that the visually impaired can hear their stop. Salem-Keizer Transit also provides many supporting programs like travel training, trip planning, mobility device training, and transit hosts that bring more awareness and education to the current transportation system and creates more utilization.

The performance measures that we have identified that show progress towards the goal of fostering education and awareness are: the outreach event report on the number of individual contacts and monthly outreach events at CH2; the number of developmentally disabled provider meetings attended; the number of presentations provided to agencies within the community; the number of website hits; the number of mailers distributed within the community; the number of public contacts made by C.S.R.s on the monthly report; and the number of printed materials ordered and distributed.



Goal:	Objectives:	Outcomes:	Who:	Performance Measure:	Cost:
<b>Foster Education and Awareness</b>	Provide educational opportunities by attending health and human services forums, community partner events, educational institution events. Work to promote and reinforce a positive outlook in individual's attitudes and behavior toward public transportation options.	By the end of 2017 through outreach efforts to the Salem-Keizer community we expect to demonstrate an increase of awareness of supportive services and programs	Outreach Specialist, Mobility Coordinator, CS Manager, Marketing, CT Manager	Outreach event report of # of individual contacts/ monthly transit center events; surveys of outreach participants concerning the success of our awareness effort; # of DD provider meetings; # of presentations to agencies in the community; website hits	K. \$6,996 per year
	Provide printed public information on transportation services and programs to bolster the community's awareness	Cherriots website, outreach events, and C.S.R.s provide information on transportation services and programs; printed materials available to identify transportation services and programs	Marketing Department, C.S.R.s, Outreach Specialist, Mobility Coordinator	# of mailers distributed, C.S.R. public contacts monthly report	L. \$16,312 per year
		Provide education opportunities at social service agencies such as Salem Hospital, DHS, and Marion County and community partner events	Marketing Department	# of printed materials ordered and distributed	M. \$13,120 per year



## Appendix G: Survey Results Matrix



Provider Category	Type of Service	Days/Hours of Service	Eligibility Requirement	Service Area	Number of Vehicles
Oregon DOT Rail & Public Transit Division	Oregon POINT bus service and Amtrak Cascades rail service	www.amtrakcascades.com www.oregon-point.com	General public	Partial statewide coverage	Referring only to transit service operated by ODOT: ODOT owns one trainset (around two years old). ODOT has a security interest in one bus (around two years old with approximately 300,000 miles on it)
City of Woodburn Transit	Fixed route: \$1.00/ride Dial-A-Ride: \$2.50/ride	Monday - Friday from 7:00 a.m. – 7:00 p.m. 24-hour notice advance reservations are needed for Dial-A-Ride service.	For Dial-A-Ride: seniors and disabled and anyone not Triplink eligible.	Woodburn city limits for fixed route and Dial-a-Ride services. For our Volunteer program between Portland-Salem.	2015 Gilig Bus-13,812, 2014 MV1- 11,382, 2011 Chevy Cutaway-36,792, 2011 Dodge Minivan-36,164, 2009 Champion Bus-123,055, 2008 Ford Cutaway-59,543, 2006 Champion Bus-120,528, 2006 Chevy Minivan-101,561, 2005 Ford Cutaway-83,393, 2002 Chevy Minivan-107,204
West Valley Hospital	Door-to-door service for medical appointments	Monday - Friday 8:30 a.m. – 4:30 p.m.	Anyone in our service area must be ambulatory or with a caregiver	Dallas, Monmouth, Independence, and Falls City	2001 Ford starlite 8 passenger bus w/wheelchair lift and a2001 Ford 4-passenger van w/wheelchair lift. Both vehicles have over 100k miles
Salem-Keizer Transit CAC	None	Monday thru Friday 6:00 a.m. - 9:00 p.m.	General public	The urban growth boundaries of Salem and Keizer	
City of Aumsville	Municipal government	Monday thru Friday 6:48 a.m. – 5:54 p.m. (CARTS service) Dial-A-Ride Weekdays	General public	CARTS bus connections between Gates and Salem. Mon- Fri 3 times a day.	See CARTS Fleet description
Kaiser Permanente Northwest	None currently, though interest in developing services		We have many members who request help finding affordable and accessible transit services.	As a healthcare provider, Kaiser Permanente Northwest serves the Greater Portland Metro area, Southwest Washington and the Mid-Valley area of Oregon. In the Mid-Valley area the service area include all of Marion and Polk counties. It also serves portions of Linn and Benton counties. It will soon serve Lane county.	
SEDCOR	None			Marion, Polk and Yamhill County	
Tillamook County Transportation District	Bus service Dial-A-Ride	7 days per week from 5:00 a.m. to 9:30 p.m.	General public, senior citizens, disabled residents, youth and Medicaid clients assigned by the Ride Care Brokerage.	Tillamook County with deviated fixed route services to Lincoln City. Intercity services between Tillamook and Portland as well as between Lincoln City to Grand Ronde and Salem on weekends plus Presidents Day and Veteran's Day. The District also provides non-emergency medical transportation services from Tillamook County to the Portland Area, Kelso/Longview, Salem, McMinnville, Lincoln City, Corvallis and Eugene	11 cutaway coaches varying in seating capacity; Intercity buses have 28 to 33 seats while smaller low floor buses seating up to 25 are used for local routes.  7 modified minivans, 2 large vans and 1 cutaway 15 passenger cutaway bus.  Note: Will be taking delivery of an additional cutaway 15 passenger bus and 1 low floor 28 passenger bus.
AAMPO	Regional planning agency		Albany and Millersburg residents, depending on the service. With the formation of the Albany Area MPO, the cities of Jefferson, Tangent, and Millersburg may also be interested in the transit service.	The Albany Area MPO does not provide transit service, but supports Albany Transit which serves the City of Albany, and Call-A-Ride which serves Albany and Millersburg.	

<p>Salem Area Mass Transit District</p>	<p>Salem-Keizer Transit provides transit and paratransit service to the Salem-Keizer area and Marion and Polk counties. All Salem-Keizer Transit services operate Monday through Friday. Cherriots provides fixed route bus service within Salem and Keizer with connections to Wilsonville and Grand Ronde. Chemeketa Area Regional Transportation System (CARTS) provides service to rural communities in Marion and Polk counties. Other Salem-Keizer Transit services include the RED Line shopper and Dial-a-Ride service, CherryLift service, travel training and rideshare information including carpool and vanpool matching. Also new this year, is The West Slem Connector, a dial-a-ride service in West Salem, that connects the rider to the main, fixed route service. (Current info from the Cherriots.org website)</p>	<p>Cherriots Fixed route service Monday through Friday, 6 am-9pm. No Holiday service</p>	<p>Cherriots: CARTS CherryLift Dial-A-Ride: RED Line:</p>	<p>Services: Cherriots' Fixed route service within the Salem/Keizer urban growth boundary</p> <p>Carts. The Chemeketa Area Regional Transportation System (CARTS) bus system provides daily service to rural Marion and Polk counties.</p> <p>The RED Line is a shopper shuttle and dial-a-ride service for seniors and people with disabilities. No application is required.</p> <p>Cherry Lift is our origin-to-destination transportation service for people whose disability prevents them from being able to use Cherriots.</p> <p>West Salem Connector is a brand new service that will change how people get around West Salem. It launched June 1, 2015 as a one year pilot project. The West Salem Connector is flexible: the bus comes to a point near your home when you request it, and takes you to another Connector point within the service zone, or connects you to regular Cherriots bus routes.</p> <p>Find a Ride! Cherriots Rideshare offers free carpool and vanpool matching through Drive Less Connect, Oregon's online Ridematching tool. With this free and easy to use tool, you'll connect with other smart commuters who are looking to save money, time, and the environment. They are your friends, neighbors and co-workers who have the same travel needs as you.</p> <p>Create a Transportation Options Program for Your Employees Cherriots Rideshare offers a variety of free services and tools to help you put together a successful Transportation Options Program at your worksite. This is one more benefit that can be added to your organization's existing benefit plan at no cost to you or your employees. Cherriots Rideshare serves employers in Polk, Marion and Yamhill Counties.</p> <p>The TripLink Call Center takes reservations for the Red Line and CherryLift and nonemergency medical transportation. TripLink also provides Non Emergent Medical Transportation (NEMT) to eligible Oregon Health Plan (OHP) clients traveling to covered medical services.</p> <p>Through the TripLink Call Center, Salem-Keizer Transit provides Non Emergent Medical Transportation (NEMT) to eligible Oregon Health Plan (OHP) clients traveling to covered medical services. TripLink will verify your eligibility prior to providing services. This includes determining if you are in a managed care plan.</p>	
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The following respondents noted that they did not provide any transit service: City of Monmouth, City of Gervais, City of Dallas, City of Keizer, City of Gates and City of Mill City. Note that Mill City is currently serviced by CARTS Route 30.





**2019-2021**  
SPECIAL TRANSPORTATION FUND (STF)  
GRANT APPLICATION INSTRUCTIONS

*DECEMBER 2018*

## **Instructions for the 2019-2021 Cherriots STF Grant Application for Projects Located within Marion and Polk Counties, Oregon**

**Please read carefully!**

### **Introduction**

These instructions cover the application process for the Special Transportation Formula Fund (STF) Program for the 2019-2021 biennium.

### **Fund Source**

STF revenues come from cigarette taxes, sales of ID cards, non-auto gas taxes, and the State of Oregon General Fund. Biennial targets are estimates of each of these revenue sources, including an estimate of the General Fund dollars that depend on legislative approval of the Governor's Budget.

- I. Grant Applications Available:** Applications for the 2019-2021 Salem Area Mass Transit District (SAMTD) STF Program are available now at [Cherriots.org/grants](http://Cherriots.org/grants). Originating from the Oregon Department of Transportation (ODOT), these programs fund transportation services for seniors and individuals with disabilities with the geographic constraint that the projects must be within Marion and Polk Counties.
- II. Available Funding: In total, \$1,992,724 is available for fiscal years 2019-2021. These funds represent the biennial allocation of STF from ODOT.** Contracts will be in place on July 1, 2019. The term of these STF agreements will be July 1, 2019 through June 30, 2021.

### **III. Program Goal**

The goal of the program is to provide a flexible, coordinated, reliable, and continuing source of revenue in support of transportation services for seniors and individuals with disabilities.

### **Eligible Applicants**

Eligible applicants are the 42 designated Oregon STF Agencies. Eligible subrecipients of STF funds from an STF Agency include: cities, counties, transportation districts, public or private agencies, and Indian tribes.

### **Eligible Activities**

Eligible grant activities include maintenance of existing transportation programs and services for the target population, expansion of such services, creation of new services, and planning and development of services for those not currently served. Some examples of projects are: dial-a-ride services for the general public, seniors, or individuals with disabilities; mileage reimbursement programs; marketing; capital asset purchases; coordination activities; and matching funds for federally-funded projects providing service for seniors and individuals with disabilities.

### **Biennial Application**

The STF application is for projects for the entire 2019-2021 biennium. Please apply for the full two-year period, using the estimated two-year allocation. ODOT Rail and Public Transit Division (RPDT) will write two-year grant agreements based on your application.

Two key components to evaluate during the selection process are the qualifications of the applicant organization and the qualifications of the proposed project.

### **Applicant Qualifications**

In the *applicant* evaluation process, SAMTD will determine that:

- Applicant has a positive history of past grants, accurate and timely reporting, etc.;
- (If a non-profit agency) Applicant is current in incorporation, registration, and annual report submissions to state and federal governments;
- Applicant is fiscally responsible and capable of managing grant funds;
- Applicant has a budget which includes all sources and uses of funds, and the budget is adopted, managed, and revised as necessary by the governing board;
- Applicant has adequate staff and resources to manage the project;
- Applicant staff has basic knowledge of transportation and receives training as required;
- Services currently operated by applicant have no pattern of complaints, accidents, or service disruptions; and
- Vehicles are maintained in a state of good repair.

### **Project Qualifications**

In the *project* evaluation process, SAMTD will determine that:

- Project design is for, or benefits, seniors and/or individuals with disabilities;

- Project design is appropriate to the purpose and type of project;
- Project is derived from the adopted Coordinated Public Transportation – Human Services Transportation Plan (“The Coordinated Plan”), dated August, 2016;
- Service is accessible to individuals with disabilities in conformance to the Americans with Disabilities Act (ADA);
- Vehicles are appropriate for the type of service;
- Service is efficient and effective for the type of service; and
- Applicant has adequate revenue to maintain services (in addition to the STF request).

#### **IV. Selection Criteria**

Each project submitted to SAMTD will be reviewed for regional value. Priorities for projects are established in the adopted Coordinated Public Transportation – Human Services Transportation Plan (“The Coordinated Plan”), dated August, 2016.

#### **V. How to Apply for STF Funds:**

1. Application forms are available beginning December 11, 2018.
2. Applications are available for download online at [Cherriots.org/grants](http://Cherriots.org/grants). The application is provided as a fillable PDF document.
3. Completed applications must be received by 12:00 p.m. on January 15, 2019 in order to be considered eligible for funding:
  - Use the online fillable PDF form and email the document to [ted.stonecliffe@cherriots.org](mailto:ted.stonecliffe@cherriots.org)
  - Paper copies will NOT be accepted
4. Incomplete and/or late applications will not be eligible for award.
5. Applicants will be notified of project award after the February 28, 2019 SAMTD Board of Directors Meeting. Alternative formats are available upon request.

**VI. Grant Award Process:**

SAMTD, as the state-designated STF body for Marion and Polk Counties, coordinates the grant process for these funds, selects the projects, and sends copies of the agreements to ODOT RPTD for their records. A Technical Advisory Committee (TAC) made up of STF Advisory Committee (STFAC) members, two members of the public, and one representative of the Mid-Willamette Valley Council of Governments (MWVCOG) will convene at a meeting one week after the application deadline. Applicants are required to present their project ideas to the TAC in order for funding recommendations to be made to the STFAC. The STFAC will review the TAC's recommendation and make project recommendations to the SAMTD Board.

Once the funding recommendation is approved by the SAMTD Board of Directors, SAMTD staff drafts agreements with recipients and sends a courtesy copy to ODOT RPTD. Grant awards are eligible for reimbursement through June 30, 2021.

**VII. Project Match for Special Transportation Funds**

There are no local match requirements for the 2019-2021 SAMTD STF Program. STF dollars may be used as local match for other federally funded projects, but do not require a local match when used alone.

**VIII. Application Instructions:**

**A. Organization Information**

In Section A on page 1, provide your organization's information including the legal name of the organization, the Employer Identification Number (EIN), the name and title of a contact person, the mailing address, telephone number, and email of the contact person.

**Type of Organization**

Indicate what type of organization is applying for grant funds. Note, individuals may not receive STF grant awards.

**Area of service**

Choose one option that best describes where the project will be located.



Note, applications will not necessarily be denied if some service will be provided outside of Marion or Polk counties. If all service supported by the grant will be outside of Marion and Polk Counties, your project will most likely need to be submitted to another STF Agency.

### **Organization Days and Hours of Operation**

Indicate the hours of operation in the “hours” column for the service supported with the STF grant. Also, list any periods of service greater than 3 days that service would not be provided, if applicable.

### **Total transportation program costs by year**

Provide the total costs of all transportation services provided by your agency or organization for the fiscal years indicated.

## **B. PROJECT INFORMATION**

Follow the instructions provided above each text box or table. Note, this information is very important for the SAMTD STF Advisory Committee to be able to understand the projects submitted and to make recommendations for funding.

## **C. ORGANIZATIONAL CERTIFICATION**

An authorized signature must be provided by a person in the organization delegated signing authority to make financial decisions for the organization.

## **IX. Timeline:**

- Tuesday, Dec. 11, 2018 - Public Notice published in Statesman Journal and applications made available on [Cherriots.org/grants](http://Cherriots.org/grants)
- Tuesday, Dec. 18, 2018 – Application training session at the Cherriots Administration Offices, 555 Court St NE, 5<sup>th</sup> Floor, Salem, Oregon (**strongly encouraged** for new Technical Advisory Committee (TAC) members and applicants to learn more about the STF and 5310 programs and to have all of their questions about the application process answered)
- Tuesday, January 15, 2019 – **All applications due at Cherriots by 12:00 p.m.**
- Tuesday, January 15, 2019 – Applications mailed and emailed to TAC members

## 2019-21 Cherriots STF Grant Application Instructions

- Tuesday, January 29, 2019 (9:30 a.m. – 1:30 p.m.) – TAC meets to hear applicant presentations and forms a recommendation of ranked projects for the STF Advisory Committee (STFAC)
- Tuesday, February 5, 2019 (3:00 p.m. – 4:30 p.m.) – STFAC meets to recommend a prioritization ranking of projects to the SAMTD Board of Directors
- Thursday, February 28, 2019 – SAMTD Board approval of STFAC recommendations at the regular Board meeting
- March 15, 2019 – Approved applications submitted to ODOT for consideration
- July 1, 2019 – 5310 grant agreements executed

### Questions? Contact:

Ted Stonecliffe, Long-Range Planning Analyst, Cherriots  
(503) 588-2424, [ted.stonecliffe@cherriots.org](mailto:ted.stonecliffe@cherriots.org)  
555 Court St NE, Suite 5230, Salem, OR 97301







**2019-2021**  
SECTION 5310 (ODOT) FORMULA  
GRANT APPLICATION INSTRUCTIONS

*DECEMBER 2018*

## I. Introduction

Title 49 USC 5310 authorizes the formula assistance program for the Enhanced Mobility of Seniors and Individuals with Disabilities Program and provides formula funds to designated recipients to improve mobility for seniors and individuals with disabilities.

Cherriots (Salem Area Mass Transit District) is the agency responsible for distributing formula allocations for projects located within Marion and Polk Counties. The total allocation for the 2019-2021 biennium is \$2,132,664.

**Grant Applications Available:** Applications for the 2019-2021 Cherriots 5310 Program are available now at [Cherriots.org/grants](http://Cherriots.org/grants). Originating from the Oregon Department of Transportation (ODOT), these programs fund transportation services for seniors and individuals with disabilities with the geographic constraint that the projects must be within Marion and Polk Counties.

These instructions cover the application process for subrecipients to apply to Salem Area Mass Transit District (SAMTD) for federal Section 5310 funding. The application is for projects for the entire 2019-2021 biennium. SAMTD is the Special Transportation Fund (STF) Agency for Marion and Polk Counties and will apply to the ODOT Rail and Public Transit Division (RPTD) on behalf of the subrecipients for approval of these grant funds.

### Fund Source

The Federal Transit Administration (FTA) allocates funds to Oregon for the Enhanced Mobility of Seniors and Individuals with Disabilities (Section 5310) program.

### Program Goal

The goal of the program is to improve mobility throughout the country by removing barriers to transportation services and expanding the transportation options available for transit-dependent populations, especially transportation of seniors and individuals with disabilities.

### Eligible Transit Agencies

Eligible transit agencies are counties, mass transit districts, transportation districts, transportation service districts, Indian tribal governments, cities, councils of government, and private non-profit organizations. The funds may be used in all areas of the state: urban, small urban, and rural.

### **Eligible Activities**

Eligible grant activities include capital purchases such as vehicles, passenger shelters, and equipment that support transportation to meet the special needs of seniors and individuals with disabilities. The program also funds projects such as contracted service, vehicle and facility preventive maintenance, and the development of new systems for improving access to transportation (e.g., travel training, marketing, or centralized call centers), provided the projects are designed to meet the special needs of the target population.

### **Funding**

RPTD established the 5310 program as a base source of ongoing funding to support coordinated transportation plans and to assist communities to provide mobility choices for seniors and individuals with disabilities.

### **Special Note for Non-profit Agencies**

If your agency is a private non-profit organization that has not applied for a recent Section 5310(ODOT) grant, please provide the following agency information:

- Articles of Incorporation
- Adopted Corporate Bylaws
- 501(c)3 non-profit approval letter from the Internal Revenue Service
- A description of transportation services and other grants received by your agency

Private non-profit agencies (for both new and returning applicants) must be registered with the Oregon Secretary of State Corporation Division (<http://www.filinginoregon.com/business/index.htm>) to do business in Oregon.

- Private non-profit organizations must provide transportation services targeted to seniors and people with disabilities and:
  - Services provided are not duplications of existing public transportation and the non-profit organization must demonstrate that the investment of grant funds benefits the community's overall transportation program, including meeting needs otherwise not met.
  - Non-profit agency applicants must submit documentation of non-profit status when submitting an application for funding. The Oregon Secretary of State maintains a website listing all non-profit agencies with current business registrations. SAMTD checks the status of non-profit applicants prior to completing agreements and amendments, at a minimum.

- A plan for sharing vehicles must be provided with applications for agencies providing transportation services to clients only (service is not open to the public or non-client seniors or individuals with disabilities).

## **II. Coordination Requirements**

ODOT's 5310 program requires that all projects selected for award address at least one need or strategy identified in the *Cherriots Coordinated Public Transportation – Human Services Transportation Plan* dated August, 2016 ("The Coordinated Plan"). A link to this document can be found at [Cherriots.org/grants](http://Cherriots.org/grants).

## **III. Local Match Requirements**

A local funding match is required for Section 5310(ODOT) grants at the rate of 10.27% for all projects.

Local match must be provided from sources other than Federal Department of Transportation (DOT) funds. Examples of sources of local match that may be used include the following:

- State or local appropriations
- Other non-DOT Federal funds
- Dedicated tax revenues
- Private donations
- Revenue from human service contracts
- Net income generated from advertising and concessions

Farebox revenue may not be used as local match. Farebox revenue is considered income and is deducted from total operating cost to determine the net cost of the activity.

The use of a non-cash local match is allowable and can include volunteer transportation program services, physical improvements, and computer work station hardware and software.

## **IV. Application Submittal Instructions**

1. Application forms are available beginning December 11, 2018.
2. Applications are available for download online at [Cherriots.org/grants](http://Cherriots.org/grants). The application is provided as a fillable PDF form.

3. Completed applications must be received by **12:00 p.m. on January 15, 2019** in order to be considered eligible for funding:
  - Use the online fillable PDF form and email the document to [ted.stonecliffe@cherriots.org](mailto:ted.stonecliffe@cherriots.org)
  - Paper copies will NOT be accepted
4. Incomplete and/or late applications will not be eligible for award.
5. Applicants will be notified of project award after the February 28, 2019 Cherriots Board of Directors Meeting. Alternative formats are available upon request.

**V. Grant Award Process:**

Cherriots, as the state-designated STF and Section 5310 body for Marion and Polk Counties, coordinates the grant process for these funds, selects the projects, and sends copies of the agreements to ODOT RPTD for their records. A Technical Advisory Committee (TAC) made up of STF Advisory Committee (STFAC) members, two members of the public, and one representative of the Mid-Willamette Valley Council of Governments (MWVCOG) will convene at a meeting two weeks after the application deadline. Applicants are required to present their project ideas to the TAC in order for funding recommendations to be made to the STFAC. The STFAC will review the TAC's recommendation and make project recommendations to the SAMTD Board of Directors.

Once the funding recommendation is approved by the SAMTD Board of Directors, SAMTD staff will draft agreements with recipients and send a courtesy copy to ODOT RPTD. Grant awards are eligible for reimbursement through June 30, 2021.



## **VI. Selection Criteria**

Each project submitted to Cherriots will be reviewed for regional value. Priorities for projects are established in the adopted Coordinated Plan, dated August, 2016.

## **VII. Application Instructions:**

### **A. Organization Information**

In Section A on page 1, provide your organization's information including the legal name of the organization, the Employer Identification Number (EIN), the name and title of a contact person, the mailing address, telephone number, and email of the contact person.

#### **Type of Organization**

Indicate what type of organization is applying for grant funds. Note, individuals may not receive STF grant awards.

#### **Area of service**

Choose one option that best describes where the project will be located. Note, applications will not necessarily be denied if some service will be provided outside of Marion or Polk counties. If all service supported by the grant will be outside of Marion and Polk Counties, your project will most likely need to be submitted to another STF Agency.

#### **Organization Days and Hours of Operation**

Indicate the hours of operation in the "hours" column for the service supported with the STF grant. Also, list any periods of service greater than 3 days that service would not be provided, if applicable.

#### **Total transportation program costs by year**

Provide the total costs of all transportation services provided by your agency or organization for the fiscal years indicated.

#### **Risk Assessment**

This is a new section required of all applicants. Answers to these questions will help RPTD identify relative risks of agencies applying for federal funding. The goal is to help transit agencies be successful and to target training to any areas

(such as negative audit findings or weak management systems) that need improvement.

## **B. PROJECT INFORMATION**

Follow the instructions provided above each text box or table. Note, this information is very important for the Cherriots STF Advisory Committee to be able to understand the projects submitted and to make recommendations for funding.

### **1. Project description**

Provide a description of the proposed project, while answering the questions based on the type of project proposed (Purchased Service, Mobility Management, Vehicle Purchases, Equipment, Signs, Amenities, and Shelters, or Facilities including Transit Centers, Bus Barns, and Transit Agency Buildings).

Purchased services are transportation services purchased by your agency to conduct service or a portion of service in your stead; your agency does not directly operate the service. In these cases, the contractor operates the transit vehicles and provides the service. The transit agency or the contracted service provider may provide vehicles or maintenance facilities. Purchased service projects must meet at least one of the following criteria:

- A written agreement, signed by both parties, exists that obligates the contractor to provide the service for a specific monetary consideration;
- A written agreement, signed by both parties, exists that specifies a contractual relationship for a certain time period and service;
- A written agreement, signed by both parties, exists that obligates the contractor to provide to the transit agency the operating statistics required by the National Transit Database (NTD) Annual Report;
- A written agreement, signed by both parties, that the transit agency pays the contractor the full costs of operating the service. The contractor does not receive any public funding for operating the service except from the transit agency. The transit agency purchasing the service must report fully allocated costs and service, assets, and resource data that the NTD requires; and
- A written agreement, signed by both parties, that the purchased service is branded under the transit agency buying the service. Users of the service must recognize that the buyer of the service is actively managing

and funding the service and that the contractor operates the service on behalf of the transit agency.

Mobility management helps communities and individuals create and succeed with their mobility options. Mobility management encourages innovation and flexibility to reach the "right fit" solution for customers. Easy access to information and referral services can assist customers in learning about and using services. This project category includes administrative and operating start-up costs. Mobility management **does not** include operating public transportation services or selling public transit tickets. Capital purchases are not eligible. If also requesting capital assets, describe the link to this mobility management project in the capital section narrative.

### **1b. Project coordination**

Describe how your agency or organization will coordinate services with other STF and Section 5310 recipients in Marion and Polk Counties. For example, a vehicle purchased with STF or 5310 funds may be transferred to another organization within the region if the capital asset is not being utilized to its fullest potential.

### **1c. Expected outcomes**

Follow the instructions on the application for purchased service and mobility management projects. For these and other projects, answer the last question.

### **1d and 1e.**

Answer the questions briefly.

## **2. Project budget**

Provide total project costs in each category for the two year biennium (July 1, 2019 to June 30, 2021). The amount in the last line ("Amount requested in this grant") does not have to equal the amount of the "Project Total," especially if local funds will be applied to the project.

## **3. Project Schedule**

A timeline of the project should include clear milestones that can be tracked and adhered to. Time-based goals should be reasonable and likely within the two year biennium. Please contact Ted Stonecliffe (contact information at the bottom of these instructions) for assistance if the project milestones will go beyond June 30, 2021.



#### 4. New Vehicle Question

Mark the “Yes” box if your project request is for the purchase of a replacement or new vehicle. If the project is a replacement vehicle, each vehicle to be replaced must meet or exceed the age and/or mileage useful life standards for its category. Mark “No” if this project is a different type of project and skip question 5. Facility projects go to question 6 and all others continue to Section “C.”

#### 5. Vehicle Information

- Enter Year, Make (manufacturer), and Model (name) of each vehicle being replaced. (For example: 2010 *EIDorado AeroLite* or 2008 *Gillig New Flyer C35LF*.)
- Select a Category from A to E using the drop-down menu (For descriptions, see “Find definitions for Categories A-E and their useful life benchmarks” on the RPTD website: <https://www.oregon.gov/ODOT/RPTD/Pages/Buy-a-Vehicle.aspx>.)
- Enter Vehicle Identification Number
- Enter Total Number of Seats including ADA seats
- Enter number of ADA Stations
- Enter Current Mileage

**Condition of Vehicles:** Enter the VIN and indicate the condition (Adequate, Marginal, or Poor) for each vehicle. Explain the reason for a marginal or poor determination in the Vehicle Maintenance History box (e.g., extensive maintenance issues, unexpected repairs, etc.). If you have selected a condition of Adequate, please provide the replacement justification. Keep explanations simple. (For example: *VIN ### Poor – 5 years over useful life; VIN #### Adequate vehicle at maximum passenger capacity, requesting a larger vehicle.*)

#### 5a. Will you use the ODOT/DAS state price agreement contract?

Select the “Yes” radio button or the “No” radio button.

NOTE: Purchase of vehicles via the Department of Administrative Services ADA vehicle price agreement is required. If you select “No”, state the reason your agency must conduct its own procurement, you are required to obtain approval from RPTD prior to the procurement.

**5b. Vehicles to be purchased:** Complete the chart for each vehicle to be purchased. These vehicles should correspond in number and category to the vehicles listed for replacement. If not a like-for-like replacement project, please return to section C and select the Expansion Vehicles instead.

- Select a Category from A to E using the drop-down menu. (For descriptions, see “Find definitions for Categories A-E and their useful life benchmarks” on the RPTD website: <https://www.oregon.gov/ODOT/RPTD/Pages/Buy-a-Vehicle.aspx>.)
- Enter the quantity of each vehicle type to be purchased.
- Enter the full cost of each vehicle with options (including graphics and equipment costs required to put the vehicle into service). Work with vendor representatives for cost estimates as needed before completing this section. Annual vehicle price adjustments are allowed for new model year vehicles.
- Enter the total cost for each vehicle category.
- Enter the number of seats when all ADA stations are occupied.
- Enter the total number of ADA stations.
- The total capacity will be the previous two columns added together.
- Select the fuel type from the drop-down box: Gas, Diesel, Electric, CNG (compressed natural gas), Hybrid Gas, or Hybrid Diesel.
- Enter estimated order and delivery dates. Check with your vendor for a typical delivery schedule if needed.

#### **6. Facility questions:**

Please contact Ted Stonecliffe at Cherriots (contact information provided below) before you apply if you are considering a large-scale, multi-phase project that will require funding beyond the biennium for which you are applying.

Will this project disturb the ground? Select the “Yes” radio button if you will be disturbing the ground and submitting the required DCE Worksheet. If “Yes”, upload your draft environmental worksheet by selecting the orange “upload” box. DCE Worksheets and concurrence by FTA are required prior to project work for any project potentially affecting the environment or historical and cultural areas. The DCE Worksheet is located online on the “Buy a Non-Vehicle Capital Asset” tab of the Rail and Public Transit website, or at this link: <https://www.oregon.gov/ODOT/RPTD/Pages/Buy-Other-Asset.aspx>.

Major capital projects are often not eligible for a documented exclusion. Consultation with local planning and environmental officials is mandatory for

planning these types of projects. Include detailed site maps and building plans along with the DCE worksheet.

### C. ORGANIZATIONAL CERTIFICATION

An authorized signature must be provided by a person in the organization delegated signing authority to make financial decisions for the organization.

## VIII. Timeline:

- Tuesday, Dec. 11, 2018 - Public Notice published in Statesman Journal and applications made available on [Cherriots.org/grants](http://Cherriots.org/grants)
- Tuesday, Dec. 18, 2018 – Application training session at the Cherriots Administration Offices, 555 Court St NE, 5<sup>th</sup> Floor, Salem, Oregon (**strongly encouraged** for new TAC members and applicants to learn more about the STF and 5310 programs and to have all of their questions about the application process answered)
- Tuesday, January 15, 2019 – **All applications due at Cherriots by 12:00 p.m.**
- Tuesday, January 15, 2019 – Applications mailed and emailed to Technical Advisory Committee (TAC) members
- Tuesday, January 29, 2019 (9:30 a.m. – 1:30 p.m.) – TAC meets to hear applicant presentations and forms a recommendation of ranked projects for the STF Advisory Committee (STFAC)
- Tuesday, February 5, 2019 (3:00 p.m. – 4:30 p.m.) – STFAC meets to recommend a prioritization ranking of projects to the SAMTD Board of Directors
- Thursday, February 28, 2019 – SAMTD Board approval of STFAC recommendations at the regular Board meeting
- March 15, 2019 – Approved applications submitted to ODOT for consideration
- July 1, 2019 – 5310 grant agreements executed

Questions? Contact:

Ted Stonecliffe, Transit Planner II, Programs, Cherriots  
(503) 588-2424, [ted.stonecliffe@cherriots.org](mailto:ted.stonecliffe@cherriots.org)  
555 Court St NE, Suite 5230, Salem, OR 97301





## WORK SESSION MEMO

Agenda Item #WS.4.b

**To:** Board of Directors

**From:** Dan Knauss, Procurement & Contracts Manager  
Al McCoy, Director of Finance/CFO

**Thru:** Allan Pollock, General Manager

**Date:** March 11, 2019

**Subject:** Discussion of Board and GM Approval Threshold Changes Due to Recent Federal Statutory Changes to the Micro-Purchase and the Simplified Acquisition (Small Purchase) Thresholds

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This is a follow up to the Work Session discussion on February 11, 2019, regarding potential changes to current Board/GM policy on contract approval thresholds. Should the threshold level be modified to align with recent Federal threshold changes for procurement that took effect in June 2018?

On June 20, 2018, the Office of Management and Budget (OMB) issued memorandum OM-18-18, "Implementing Statutory Changes to the Micro-Purchase and the Simplified Acquisition Thresholds for Financial Assistance." In accordance with recent statutory changes set forth in the National Defense Authorization Act (NDAA), this memorandum raises the threshold for micro-purchases under Federal financial assistance awards from \$3,500 to \$10,000 and raises the threshold for simplified acquisitions from \$150,000 to \$250,000 for all recipients. The increases for micro-purchases and the simplified acquisition threshold apply to FTA-funded procurements made on or after June 20, 2018.

Staff has modified its procurement policies to align with the Federal thresholds as identified in OMB memorandum OM-18-18. In last month's memo, staff had previously suggested the modification of Financial Policy #413 to match the FTA thresholds for Board approval levels.

After discussion, Board members requested a list of contract activity over the last two years to help inform their discussion. The following table shows that only two

contracts during this time period would not have gone to the Board for approval if the new, higher \$250,000 approval threshold had been in place.

<b>Contracts Awards Over \$100K For Period 3/1/17 through 2/28/19</b>			
<b>CONTRACTS \$100k - \$250k</b>			
<b>Vendor</b>	<b>Project Title</b>	<b>Date of Award</b>	<b>Contract Dollar Value</b>
Jeff Carter Construction	Bus Stop Improvement (Group 2)	5/25/2018	\$ 176,170.00
Parker, Smith, & Feek, Inc.	Healthcare Broker Services	2/28/2019	\$ 145,965.42
<b>CONTRACTS OVER \$250k</b>			
Mott McDonald	Project Management Services	9/22/2017	\$ 550,000.00
Gillig, LLC 18009	(6) 35' Bus and (6) 40' Bus	10/5/2017	\$ 6,338,658.00
MV Transportation	Transportation Services	1/1/2018	\$ 34,702,000.00
Allied Universal Security Services	Security Services	1/1/2018	\$ 1,513,367.91
CFM Strategic Communications	Lobbying Services	1/1/2018	\$ 420,840.00
Gillig, LLC	(4) 35' Bus and (4) 40' Bus	6/29/2018	\$ 1,066,192.00
Schetsky NW Sales	(6) Category D Paratransit Bus	7/23/2018	\$ 430,697.00
Brown & Brown Contracting, Inc.	KTC Signalized Intersection	12/17/2018	\$ 1,815,645.00

Salem Area Mass Transit District  
**BOARD OF DIRECTORS MEETING**  
Thursday, March 28, 2019 at 6:30 PM  
Courthouse Square – Senator Hearing Room  
555 Court Street NE, Salem, Oregon 97301

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**AGENDA**

- A. CALL TO ORDER** (President Robert Krebs)
1. Note of Attendance for a Quorum
  2. Pledge of Allegiance (Director Steve Evans)
- B. “SAFETY MOMENT” THOUGH FOR THE DAY**
- C. ANNOUNCEMENTS & CHANGES TO AGENDA**
- D. PRESENTATIONS**
1. FY2018-2019 CAFR and Audit Report
  2. United Gospel Mission Project
- E. PUBLIC COMMENT**
- Time is designated at each Board meeting for members of the public to testify on any items of Board business, being limited to three minutes.
- F. CONSENT CALENDAR**
- Items on the Consent Calendar are considered routine and are adopted as a group by a single motion unless a Board member requests to withdraw an item. Action on items pulled for discussion will be deferred until after adoption of the Consent Calendar.
1. **Approval of Minutes**
    - a. Minutes of the February 11, 2019 Board Work Session
    - b. Minutes of the February 28, 2019 Board Meeting
- G. ITEMS DEFERRED FROM THE CONSENT CALENDAR**
- H. ACTION ITEMS**
1. Approval of STF Advisory Committee Recommendations for STF and 5310 (ODOT) Funding

2. Approve Statewide Transportation Improvement Fund Formula Plan Application Modifications

**I. INFORMATIONAL REPORTS**

**J. GENERAL MANAGER'S REPORT**

**K. BOARD OF DIRECTORS REPORTS**

This is the opportunity for Board members to report on citizen communications, committee and meeting participation, or special projects they are participating in as a representatives of the District.

**L. ADJOURN BOARD MEETING**

**Next Regular Board Meeting Date: Thursday, December 13, 2018**

This is an open and public meeting in a place accessible to people with disabilities. For individuals who need the assistance of Interpreters for sign language or for languages other than English to participate in the meeting, please contact the Clerk of the Board at least two business days prior to the meeting - by phone at 503-588-2424. (For individuals with a hearing impairment, please call the Oregon Telecommunications Service, 711.) Office hours are Monday-Friday from 8:00 AM to 5:00 PM.

For an electronic copy of the Board meeting agenda packet, go to [www.cherriots.org/board](http://www.cherriots.org/board). Regular Board meetings are televised on Channel 21; and can be viewed at any time on CCTV's website - <https://www.cctvsalem.org/all>.

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Esta es una reunión abierta y pública en un lugar accesible para personas con discapacidades. Para las personas que necesiten la asistencia de intérpretes para el lenguaje de señas o para idiomas distintos al inglés para participar en la reunión, comuníquese con el secretario de la Junta al menos dos días hábiles antes de la reunión, por teléfono al 503-588-2424. (Para personas con impedimentos auditivos, llame al Servicio de Telecomunicaciones de Oregon, 711.) El horario de atención es de lunes a viernes de 8:00 a.m. a 5:00 p.m.

Para obtener una copia electrónica del paquete de la agenda de la reunión de la Junta, vaya a [www.cherriots.org/board](http://www.cherriots.org/board). Las reuniones regulares de la Junta se televisan en el Canal 21; y puede verse en cualquier momento en el sitio web de CCTV: <https://www.cctvsalem.org/all>.



Upcoming Board Meeting and Work Session Agenda Items  
March 6, 2019

Work Session	Board Meeting
<p><b>March 11, 2019</b> <b>Packets due to GM office: March 4</b></p> <ul style="list-style-type: none"> <li>• Service Enhancement Discussion – Statewide Transportation Improvement Fund Advisory Committee</li> <li>• Special Transportation Fund Briefing</li> <li>• Procurement Threshold Discussion</li> <li>•</li> </ul>	<p><b>March 28, 2019</b> <b>Packets due to GM office: March 14</b></p> <ul style="list-style-type: none"> <li>• Presentation: UGM New Project</li> <li>• Presentation: FY2018-2019 CAFR / Audit Report</li> <li>• Special Transportation Fund Plan Ratification</li> </ul>
<p><b>April 8, 2019</b> <b>Packets due to GM office: Apr 1</b></p> <ul style="list-style-type: none"> <li>• Service Enhancement Discussion</li> <li>• Review of Sustainability Statement</li> <li>• PLACEHOLDER: Renewable Natural Gas</li> </ul>	<p><b>April 25, 2019</b> <b>Packets due to GM office: April 11</b></p> <ul style="list-style-type: none"> <li>• May Service Change Briefing</li> <li>• Adoption of Sustainability Statement</li> <li>• Purchase Fixed Route Vehicles</li> <li>• Purchase Paratransit Vehicles</li> </ul>
<p><b>May 13, 2019</b> <b>Packets due to GM office: May 6</b></p> <ul style="list-style-type: none"> <li>• Service Enhancement Discussion</li> </ul>	<p><b>May 23, 2019</b> <b>Packets due to GM office: May 9</b></p> <ul style="list-style-type: none"> <li>• Consent: Adopt FY2020 Board Meeting Schedule</li> <li>• Q3 TripChoice, Performance, Finance</li> </ul>
<p><b>June 10, 2019</b> <b>Packets due to GM office: Jun 3</b></p> <ul style="list-style-type: none"> <li>• Service Enhancement Discussion</li> <li>• ITS Contract Briefing (CAD/AVL)</li> </ul>	<p><b>June 27, 2019</b> <b>Packets due to GM office: June 13</b></p> <ul style="list-style-type: none"> <li>• Board Reception for Outgoing Board Members</li> <li>• Appoint STIFAC Chair and Vice-Chair</li> <li>• Budget Hearing</li> <li>• Res#2019-XX Adopt FY20 Approved Budget</li> <li>• Approval of FY2020 United Way Donation</li> <li>• ITS (CAD/AVL) Contract</li> </ul>
<p><b>July 8, 2019</b> <b>Packets due to GM office: Jul 1</b></p> <ul style="list-style-type: none"> <li>• Service Enhancement Discussion</li> </ul>	<p><b>July 25, 2019</b> <b>Packets due to GM office: July 11</b></p> <ul style="list-style-type: none"> <li>• Accept Prelim Annual EOY FY2019 Financial Report</li> <li>• Budget Committee Appointments</li> <li>• PLACEHOLDER: Oath of Office/Election of Officers</li> </ul>
<p><b>August 12, 2019</b> <b>Packets due to GM office: Aug 5</b></p> <ul style="list-style-type: none"> <li>• SDIS Board Best Practices Assessment</li> <li>• Issue GM Performance Evaluation Packets</li> <li>• Review Neighborhood Association Contacts</li> <li>• Board Committee assignments</li> </ul>	<p><b>August 22, 2019</b> <b>Packets due to GM office: August 8</b></p> <ul style="list-style-type: none"> <li>• Trip Choice Report – 4<sup>th</sup> Quarter/Year End</li> <li>• Performance Report – 4<sup>th</sup> Quarter</li> <li>• September Service Change Briefing</li> </ul>

<p><b>September 9, 2019</b>  <b>Packets due to GM office: Sep 2</b></p>	<p><b>September 26, 2019</b>  <b>Packets due to GM office: September 12</b></p> <ul style="list-style-type: none"> <li>• Accept annual security report</li> <li>• Approval of annual SDIS board check list ©</li> <li>• FY 2019 Performance Report</li> <li>• GM performance evaluation (<b>Executive Session</b>)</li> </ul>
<p><b>October 14, 2019</b>  <b>Packets due to GM office: October 4</b></p> <ul style="list-style-type: none"> <li>• Proposed FY2021 Budget Calendar</li> </ul>	<p><b>October 24, 2019</b>  <b>Packets due to GM office: October 10</b></p> <ul style="list-style-type: none"> <li>• Approval of FY2021 Budget Calendar (C)</li> </ul>
<p><b>November 12, 2019 Tuesday</b>  <b>Packets due to GM office: November 1</b></p> <ul style="list-style-type: none"> <li>• STIFAC / CAC / STFAC Updates for Dec meeting             <ul style="list-style-type: none"> <li>○ Member Appointments</li> <li>○ Chairs &amp; Vice-Chairs Appointments</li> </ul> </li> </ul>	<p><b>November - No Board meeting</b></p>
<p><b>December - No work session</b></p>	<p><b>December 12, 2019</b>  <b>Packets due to GM office: November 27 (Wed)</b></p> <ul style="list-style-type: none"> <li>• CONSENT CALENDAR:             <ul style="list-style-type: none"> <li>○ Committee Appointments-STFAC/CAC</li> <li>○ Appoint Chair &amp; Vice-Chair CAC</li> </ul> </li> <li>• January Service Change Briefing</li> <li>• Q1 Finance, Trip Choice, Perf Report</li> </ul>
<p><b>January XX, 2020</b>  <b>Packets due to GM office: January X</b></p> <ul style="list-style-type: none"> <li>• Board-appointed Advisory Committees</li> <li>• MWVCOG Annual Meeting/Dinner</li> <li>• Present Draft 2019 Legislative Agenda</li> </ul>	<p><b>January XX, 2020</b>  <b>Packets due to GM office: January XX</b></p> <ul style="list-style-type: none"> <li>• Adoption of 2019 Legislative Agenda</li> </ul>
<p><b>February XX, 2020</b>  <b>Packets due to GM office: February X</b></p> <ul style="list-style-type: none"> <li>• Service Enhancement Discussion STFAC Recommendations for STF/5310 Projects</li> </ul>	<p><b>February XX, 2020</b>  <b>Packets due to GM office: February XX</b></p> <ul style="list-style-type: none"> <li>• Q2 Finance, Trip Choice, Performance Report</li> <li>• STFAC Recommendations for STF/5310 Projects</li> </ul>
<p><b>To Be Scheduled - Work Session</b></p> <ul style="list-style-type: none"> <li>• Uniform Contract, Tire Contract &amp; Fuel Contract</li> <li>• Audit Services Contract</li> </ul>	<p><b>To Be Scheduled - Board Meeting</b></p> <ul style="list-style-type: none"> <li>• Capitol City CycleShare Program (Spring 2019)</li> <li>• R#2018-XX re: IT Policy</li> </ul>

**UPDATED:** March 7, 2019

**TO:** SAMTD BOARD OF DIRECTORS  
**FROM:** ALLAN POLLOCK, GENERAL MANAGER  
**SUBJECT:** CALENDAR OF SCHEDULED MEETINGS

**Meetings are held in the Senator Hearing Room at  
 Courthouse Square, 555 Court St NE, unless otherwise noted**

**• MARCH 2019**

<b>7</b>	<b>Wed</b>	<b>5:30-7:30p</b>	<b>Statewide Transportation Improvement Fund Advisory Committee</b>
9	Sat	9:00-3:30p	Oregon Department of Revenue: <u>Local Budget Law Training</u> <ul style="list-style-type: none"> <li>• Chemeketa Community College, Bldg 48, Room 210</li> </ul>
<b>10</b>	<b>Sun</b>	<b>2:00 AM</b>	<b>DAYLIGHT SAVING TIME Begins (...Spring Forward)</b>
<b>12</b>	<b>Tue</b>	<b>9:00-11:15a</b>	<b>Special Transportation Fund Advisory Committee</b> <ul style="list-style-type: none"> <li>• <b>Marion County Commissioners Conference Room, Suite 5231</b></li> </ul>
17-19	.....		APTA Legislative Conference in Washington D.C.
18	.....		Cherriots Transit Operators & Maintenance Appreciation Day
19	Tue	5:30-7:30p	Citizens Advisory Committee
25-26	.....		National Transit Institute: Project Management for Transit Professionals
28	Thu	6:30 PM	SAMTD Board of Directors Meeting

**• APRIL 2019**

2	Tue	3:00-4:30p	Special Transportation Fund Advisory Committee <ul style="list-style-type: none"> <li>• <u>Ethic Training</u> presented by Attorney Ben Fetherston</li> </ul>
8	Mon	5:30 PM	SAMTD Board Work Session
13-15	.....		APTA CEOs Seminar, Chicago, IL
.			
15	Mon	.....	REMINDER to file SEI Report
16	Tue	5:30 PM	Citizens Advisory Committee
24	Wed	.....	"Administrative Professionals" Day
25	Thu	.....	"Take our Daughters and Sons to Work" Day
25	Thu	.....	National Transit Day "Get on Board"
25	Thu	6:30 PM	SAMTD Board of Directors Meeting
29-30	.....		WSTA Clerks of the Transit Authority Meeting

**• MAY 2019**

2	Thu	6:00 PM	SAMTD Budget Committee Meeting 1
7	Tue	3:00-4:30p	Special Transportation Fund Advisory Committee
9	Thu	6:00 PM	SAMTD Budget Committee Meeting 2
13	Mon	5:30 PM	SAMTD Board Work Session
16	Thu	6:00 PM	SAMTD Budget Committee Meeting 3 (if necessary)
17-21	.....		APTA International Bus Rodeo, Louisville, KY

A calendar for upcoming Board meetings, a copy of the adopted Budget, and minutes of past Board meetings can be found on Salem-Keizer Transit's website at: [www.cherriots.org/board](http://www.cherriots.org/board) or at the District's Administration Office at 555 Court Street NE, Suite 5230, Salem, Oregon 97301. For a televised recording of past Board meetings, go to [www.cctvsalem.org](http://www.cctvsalem.org).

SAMTD Board of Directors  
Calendar of Scheduled Meetings

19-22	.....		APTA Mobility Conference (APTA-enhanced Bus & Paratransit Conference)
23	Thu	6:30 PM	SAMTD Board of Directors Meeting
<b>27</b>	<b>Mon</b>	<b>CLOSED</b>	<b>HOLIDAY: MEMORIAL DAY</b>   Cherriots Administration Offices-Customer Service <b>Closed; NO</b> Bus Service
	Thu	11:30 AM	Keizer Iris Festival Sponsor Appreciation Lunch
	Sat	10:00 AM	<ul style="list-style-type: none"> <li>• In the big tent, 4100 Cherry Ave NE</li> </ul> Keizer Iris Festival Parade

• **JUNE 2019**

8	Sat	6:00 PM	Cherriots Employee Recognition Banquet
10	Mon	5:30 PM	Board Work Session
18	Tue	5:30 PM	Citizens Advisory Committee
27	Thu	6:30 PM	SAMTD Board of Directors Meeting
			<ul style="list-style-type: none"> <li>• Budget Hearing</li> </ul>
30	Sun	.....	2019 Legislation Session Ends

• **JULY 2019**

<b>4</b>	<b>Wed</b>	<b>CLOSED</b>	<b>HOLIDAY 4<sup>th</sup> of July</b>   Cherriots Administration Offices-Customer Service <b>Closed; NO</b> Bus Service
8	Mon	5:30 PM	SAMTD Board Work Session
25	Thu	6:30 PM	SAMTD Board of Directors Meeting
			<ul style="list-style-type: none"> <li>• Oath of Office / Officer Elections</li> </ul>

• **AUGUST 2019**

	Wed	5:00 PM	Statewide Transportation Improvement Fund Advisory Committee
	Mon	5:30 PM	SAMTD Board Work Session
	Thu	6:30 PM	SAMTD Board of Directors Meeting

• **SEPTEMBER 2019**

<b>2</b>	<b>Mon</b>	<b>CLOSED</b>	<b>HOLIDAY: Labor Day</b>   Cherriots Administration Offices-Customer Service; <b>Closed - NO</b> Bus Service
<b>3</b>	<b>Tue</b>	.....	<b>CHERRIOTS SERVICE CHANGES</b> (go to: <a href="http://cherriots.org/en/changes">http://cherriots.org/en/changes</a> )
		3:00-4:30p	Special Transportation Fund Advisory Committee
9	Mon	5:30 PM	SAMTD Board Work Session
17	Tue	5:30 PM	Citizens Advisory Committee
26	Thu	6:30 PM	SAMTD Board of Directors Meeting and
		5:30 PM	<ul style="list-style-type: none"> <li>• Executive Session ORS 192.660(2)(I) GM Performance Evaluation</li> </ul>

• **OCTOBER 2019**

.....	.....		Drive Less Connect Challenge ( <a href="http://www.drivelessconnect.com/">http://www.drivelessconnect.com/</a> )
1	Tue	3:00 PM	Special Transportation Fund Advisory Committee
	Wed	5:00 PM	Statewide Transportation Improvement Fund Advisory Committee
14	Mon	5:30 PM	SAMTD Board Work Session
24	Thu	5:30 PM	Executive Session (ORS 192.660(2)(4)
		6:30 PM	SAMTD Board of Directors Meeting
.....	.....		Oregon Public Transportation Conference

• **NOVEMBER 2019**

3	Sun	2:00 AM	<b>DAYLIGHT SAVING TIME ENDS</b> – Fall Back
5	Tue	3:00 PM	Special Transportation Fund Advisory Committee