

Salem Area Mass Transit District  
**BOARD OF DIRECTORS MEETING**

Thursday, March 28, 2024 at 5:30 PM

*This meeting is open to the public, please see page 2 for available formats.*

**AGENDA**

<b>I. CALL TO ORDER</b>	
<b>A. Note the Attendance for a Quorum</b>	
<b>B. Safety Moment</b>	
<b>II. ANNOUNCEMENTS AND CHANGES TO AGENDA</b>	
<b>III. PRESENTATION(S)</b>	
<b>A. <u>2024 State Legislative Session Report</u></b> .....	4
<b>IV. PUBLIC COMMENT *</b>	
<b>V. CONSENT CALENDAR **</b>	
<b>A. Approval of Minutes</b>	
1. <u>February 22, 2024 Board of Directors Meeting</u> .....	15
2. <u>March 14, 2024 Board of Directors Work Session</u> .....	19
<b>B. Routine Business Items</b>	
1. <u>Approve Renewal of Contract for Internet Services</u> .....	21
2. <u>Approve Contract for Protected Leave / Disability Management Software</u> .....	23
<b>VI. ITEMS DEFERRED FROM THE CONSENT CALENDAR</b>	
<b>VII. ACTION ITEMS</b>	
<b>A. <u>Adopt Coordinated Plan and 5310 Project Management Plan Updates</u></b> .....	25
<b>VIII. INFORMATIONAL REPORTS</b>	
<b>A. <u>Service Change Briefing for May 2024</u></b> .....	326
<b>IX. GENERAL MANAGER'S REPORT</b>	
<b>X. <u>BOARD OF DIRECTOR'S REPORT</u> ***</b> .....	332

## XI. ADJOURNMENT

**Next Board Work Session Date: Thursday, April 11, 2024**  
**Next Regular Board Meeting Date: Thursday, April 25, 2024**

### **Available meeting formats:**

- In Person: Senator Hearing Room at Courthouse Square, 555 Court Street NE, Salem, Oregon 97301
- Zoom Gov.: Meeting ID: 161 201 7035 | Passcode: 512136  
Go to: <https://cherriots-org.zoomgov.com/j/1612017035?pwd=L2g4UDIVMFV0eklVd2hvTFpsRWhhZz09>
- Comcast Channel 21
- Live Stream: <https://www.capitalcommunitymedia.org/all>
- One Tap Mobile: +16692545252,,1612017035#,,, \*512136# US
- Landline Phone: +1 669 254 5252 US

**\*Public Comment:** Designated time for community members to testify before the board on any items of Board business, being limited to three minutes. Public Comments are accepted in writing, by email, in person, or by ZoomGov (Written testimony will be submitted and entered in to the record if it is received by 5:00 P.M. on the day of the meeting).

Email: [Board@cherriots.org](mailto:Board@cherriots.org)

Mail: Attn: Cherriots Board, 555 Court St. NE, Suite 5230, Salem, OR 97301

**\*\*Consent Calendar:** Items 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.

**\*\*\* Board of Director Report:** Time for Board members to report on transit-related issues through committee and meeting participation, citizen communications, or special projects they are participating in as representatives of the District.

**Virtual Meetings:** The Board of Directors meeting is a public meeting; in a place that is ADA- accessible. Board meetings will also be available via ZoomGov. The meeting I.D. and passcode are below the agenda.

**Closed Captioning (CC):** ZoomGov's live streaming platform includes Closed Captioning (CC). It is a good tool for aiding viewer participation in the meeting. However, CC does not always translate accurately.

**Alternate Formats:** This is a public meeting in a place that is ADA accessible. With 48 hours of notice, auxiliary hearing aids and services, and alternate formats for individuals with limited English proficiency are available. Requests can be made to the Clerk of the Board by phone at 503-588-2424 or with the assistance of TTY: Oregon Relay Services at 1-800-735-2900 (or 711). Cherriots administration office hours are Monday-Friday from 8:00 AM to 5:00 PM.

**Electronic Copies** of the Board's meeting agenda packet are distributed by email 6-7 days prior to the meeting. The agenda packet is also included on the Cherriots website under Public Meetings and Notices at: <https://www.cherriots.org/meetings/>.

**Email Distribution List:** To add your email address to the Board's meeting distribution list, please send your email address to the Clerk of the Board at [publictestimony@cherriots.org](mailto:publictestimony@cherriots.org).

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**Reuniones Virtuales:** La reunión de la Junta Directiva es una reunión pública; en un lugar accesible según la ADA. Las reuniones de la junta también estarán disponibles a través de ZoomGov. La reunión I.D. y el código de acceso están debajo de la agenda.

**Subtítulos (CC):** la plataforma de transmisión en vivo de ZoomGov incluye subtítulos (CC). Es una buena herramienta para ayudar a los espectadores a participar en la reunión. Sin embargo, CC no siempre traduce con precisión.

**Formatos alternativos:** esta es una reunión pública en un lugar accesible según la ADA. Con 48 horas de anticipación, se encuentran disponibles audífonos y servicios auxiliares, y formatos alternativos para personas con dominio limitado del inglés. Las solicitudes se pueden hacer al Secretario de la Junta por teléfono al 503-588-2424 o con la ayuda de TTY: Oregon Relay Services al 1-800-735-2900 (o 711). El horario de atención de la administración de Cherriots es de lunes a viernes de 8:00 a. m. a 5:00 p. m.

**Las copias electrónicas** del paquete de la agenda de la reunión de la Junta se distribuyen por correo electrónico 6-7 días antes de la reunión. El paquete de agenda también se incluye en el sitio web de Cherriots en Reuniones públicas y avisos en: <https://www.cherriots.org/meetings/>.

**Lista de distribución de correo electrónico:** Para agregar su dirección de correo electrónico a la lista de distribución de reuniones de la Junta, envíe su dirección de correo electrónico al Secretario de la Junta a [publictestimony@cherriots.org](mailto:publictestimony@cherriots.org).



## BOARD MEETING MEMO

Agenda Item III.A

**To:** Board of Directors  
**From:** Allan Pollock, General Manager  
**Date:** March 28, 2024  
**Subject:** State Legislative Report

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### ISSUE

Shall the Board receive the 2024 State Legislative report?

### BACKGROUND AND FINDINGS

The state legislature held its short session beginning on February 5, 2024 and adjourned ahead of schedule following significant bipartisan accomplishments. During the session the District was represented by the CFM Advocates state legislative team. Dale Penn, Partner will present an overview of the session. Enclosed as [Attachment A](#) is the 2024 State Legislative Session Report.

### FINANCIAL IMPACT

None.

### RECOMMENDATION

For information only.

### PROPOSED MOTION

None.



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## AGENDA

- **CFM State Affairs Team**
- **2024 Legislative Session**
  - Timeline and dates
  - Major issues
- **SAMTD Legislative Priorities**
- **Interim and 2025 Session**

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# STATE AFFAIRS TEAM



**Dale Penn**  
State Affairs Partner



**Waylon Buchan**  
State Affairs Counsel



**Zack Reeves**  
Senior VP



**Ryann Gleason**  
State Affairs Manager



**Jessica Adamson**  
Senior VP

March 2024 Board Presentation

3



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## 2024 SESSION

- Important Dates and Timeline
  - February 5, 2024 – Start of Session
  - March 7, 2024 - Sine Die
  - Economic Forecast – 2/7
- Major Issues
  - Housing and Houselessness
  - M110 Changes
  - Campaign Finance Reform

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4

# 2024 SESSION CONT.

- Bipartisan Cooperation
- Tolling and Transportation Issues
- Right to Repair
- Daylight Savings



## 2024 STATE LEGISLATIVE AGENDA

Salem Area Mass Transit District (aka Cherrriots) has established as its top 2024 legislative priorities to preserve, maintain and enhance public transportation investments and improve public transit safety.

Priority	Item
1	<b>Preserve, Maintain and Enhance Public Transportation Investments.</b> Work with OTA, ODOT, transit advocates and others to preserve, maintain and enhance funding for public transportation investments. Protect against efforts to reduce transit funding resulting from the statewide transit employee payroll tax.
1	<b>Transit Safety.</b> Work with transit advocates to support policy changes that improve overall transit safety and mitigate addiction crisis impacts to riders, staff and the public.
1	<b>Westside Regional Rail Expansion.</b> Work with legislative champions, transit advocates and local community members in support of efforts to study the expansion of the regional rail line from Portland to Salem.
2	<b>Zero-emission Vehicles.</b> Monitor opportunities to increase investments in zero-emission vehicle transit infrastructure throughout the state.
2	<b>Support Increased Investments on Footpaths and Bicycle Trails.</b> Monitor discussions and activity surrounding legislative concepts and budget appropriations that would increase investments on footpaths and bicycle trails.
2	<b>Property Tax Reform.</b> Monitor discussions and legislative activity involving property tax reform to determine impacts to transit services.
3	<b>I-5 Bridge Replacement Conversations.</b> Monitor discussions and budget allocations involving the replacement of the I-5 bridge between Portland and Vancouver.
3	<b>Tolling -</b> Monitor discussions and budget allocations involving tolling issues throughout the state.

In addition, Cherrriots supports the Oregon Transit Association (OTA) legislative priorities for the 2024 legislative session. As particular bills work through the system, CFM will work with Cherrriots leadership to monitor and report on any legislative concepts which may impact the District and prepare an appropriate response.

Contact:  
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Dale Penn II, CFM Advocates  
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# 2024 STATE LEGISLATIVE AGENDA



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**advocates**  
Principled advocacy. Real results.

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# BILLS OF INTEREST

- SB 1572 – Westside Express Service Expansion Study (dead)
  - SB 1553 – Transit Safety
  - HB 4072 – State Payments for City of Salem
  - HB 4067 – Task Force on Electric Micromobility
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# THANK YOU

Dale Penn and Waylon Buchan | CFM Advocates | [www.cfmadvocates.com](http://www.cfmadvocates.com)





# 2024 SESSION REPORT

**Prepared by**  
Waylon Buchan  
Dale Penn

**Prepared for**  
Allan Pollock,  
General Manager



# 2024 SESSION SUMMARY

Oregon lawmakers adjourned the 2024 legislative session early after achieving major bipartisan wins on a \$350 million housing production package, recriminalizing drug possession coupled with significant investments in behavioral health. Bills to establish summer school grants and institute campaign finance limits also passed in the final days, but the legislature failed to approve wildfire funding and a permanent switch to standard time. In contrast to the 2023 legislative session interrupted by a six-week Senate Republican walkout, the five-week 2024 session was marked by bipartisanship and compromise on high-profile issues.

Other notable bills that passed during the short session included funding for semiconductor worker training, arts organizations, employment-related day care and improved pensions for district attorneys, firefighters and police officers. Lawmakers also approved a right to repair bill for electronics products and a task force to study how to reduce suicides by gun, while empowering a state agency to penalize child labor law violations and blocking an urban growth boundary expansion vote in North Plains.

Other failed measures sought to reduce corporate ownership of health care practices, expand school-based health centers, continue free community college tuition, prohibit book bans and correct overpayment of road fees by truckers.



Before adjourning, the House formally elected Rep. Julie Fahey (D-Eugene), as Speaker after Rep. Dan Rayfield (D-Corvallis) stepped down to concentrate on his race for attorney general. The session was the last for two members seeking seats in Congress, others who are retiring after years of service, and a handful of Republican and Independent senators who are no longer eligible to run for re-election due to the walkout in 2023.

CFM posted an Oregon Insider soon after Sine Die on these and some additional topics. You can find this on [CFM's website](#).

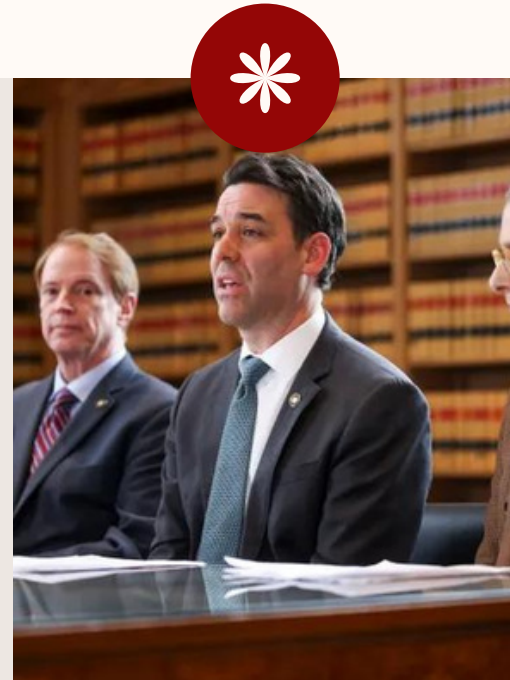


## Measure 110

Under the threat of a proposed ballot measure, Speaker Rayfield (D-Corvallis) and Senate President Rob Wagner (D-Lake Oswego) formed the Joint Addiction and Community Safety Response committee in October 2023 and appointed two former prosecutors as co-chairs. The committee's charge was coming up with a policy to reform Ballot Measure 110, originally passed by voters in 2020 but widely viewed by voters as unsuccessful in implementation. The threat of a well-funded ballot measure to undo all of M110 looming over the legislature was enough of a reason to get a compromise passed through the 2024 short session.

Legislators ultimately landed on criminalizing possession of a controlled substance as an unclassified misdemeanor and made deflection optional in each county. This led to the League of Oregon Cities, Oregon District Attorneys Association, Chiefs of Police, and Sheriffs to support the legislation.

The ACLU, public defense groups, and other BIPOC organizations were among the proponents of decriminalization who testified against the proposal, claiming that it will drag Oregon back into the failing drug war and unfairly harm communities of color. Others expressed concern that the rollback of Measure 110 will be implemented in 36 different ways across the state.



After weeks of intense negotiations the bill left the committee with strong bipartisan support. Wasting no time, the House waived to chamber rules to move HB 4002A the very next day as a special order of business. The bill received overwhelming bipartisan support in the House and was voted on the next day in the Senate with similar results. The bill now is on the Governor's desk, where she is expected to sign it into law.

Accompanying HB 4002A was a budget bill, HB 5204, which includes more than \$211 million in allocations to public safety, mental health, and prevention. Shovel-ready projects worth \$85 million will address the capacity of the behavioral health system; \$80.5 million will support public safety, including deflection programs and public defense; \$8.8 million will go toward workforce training in behavioral health; \$17.6 million will go toward prevention; and \$18.8 million will go toward enhancing the behavioral health system, including the creation of Certified Community Behavioral Health Clinics and jail-based medication-assisted treatment services for opioid addiction. [Here](#) is a complete list of all the funding allocations.



## Housing

In the month leading up to session Governor Tina Kotek announced that her only bill would be a housing policy package along with requested housing-related investments totaling over \$500 million. In keeping with the near-laser focus on housing shown by administration through the first year-plus of her tenure, Kotek's package brought back many of the elements of [HB 3414](#) (2023), amended in certain areas after extensive interim outreach to local governments and land use advocates.

The governor's plan called for \$400 million in housing-related infrastructure and middle housing investments to be distributed statewide, as well as \$65 million to fund existing shelter operations and \$33 million in rental assistance.



Senate Bill 1537 was introduced and quickly taken up by the Senate Committee on Housing. Local governments remained opposed to many of the policy provisions that required them to accept certain adjustments requested by developers, but the fiercest opposition came from land use advocates and environmental groups, who argued that the bill's provision to allow cities a one-time opportunity to incorporate up to 150 acres of buildable land into the urban growth boundary (UGB) was antithetical to Oregon's esteemed land use process. Following intense, time-sensitive negotiations the bill was amended to limit the UGB incorporations to 100 acres or less and place strict limits on the type of land eligible.

The funding portion of the bill was spun off into [SB 1530](#). Spearheaded by Rep. David Gomberg (D-Otis), the legislature ranked housing infrastructure projects based mainly on their 'bang for the buck'. In the process, the body shrank the Governor's priority from \$500 million to just over \$350 million, including \$89 million dedicated to infrastructure projects statewide and \$106 million for shelter and temporary housing.

The package passed the legislature easily, with a handful of 'no' votes in each chamber, and lawmakers expressed keen interest in continuing to invest in housing infrastructure in future sessions.



## Health Care

The health care committees retained their reputation as the workhorses of the Oregon legislature, plowing through an outsized share of concepts this short session. From corporate practice of medicine to pharmacy benefit manager regulation to certificate of need bills, the committees explored the range of health care topics all on a compressed time frame.

Lawmakers passed a policy omnibus including a provision that ensured that medication flavoring would be available at community pharmacies and renaming physician's assistants to physician associates. Legislators also passed bills on co-pay accumulators, increasing restrictions on white bagging in clinic settings for cancer drugs, and a bill to increase regulations on pharmacy benefit managers made it through the session after significant compromises.

A bill to strengthen Oregon's corporate practice of medicine statute failed to move forward after the issue became politicized during a hearing in the Senate. Bills on certificate of need, enabling access to contract pharmacies through the 340b program, and increased information about proposed insurance mandates failed to advance. And, a bill to strengthen penalties for violence against health care workers languished in Ways and Means after legislators grew weary about the number of increased penalty votes they were taking this session. All of these bills will likely return in 2025.



## Transportation

The 2024 short session served as a prologue for what will follow during the 2025 long session. Lawmakers cobbled together a framework of anticipated needs for the upcoming 2025 transportation package and began gathering input from their colleagues. Importantly, the chairs of the Joint Committee on Transportation highlighted some of the most pressing challenges facing the committee. The Oregon Department of Transportation faces serious budget challenges in the coming years as their primary source of revenue, the gas tax, continues to dwindle. Congestion in the Portland region remains a problem, but freeway expansion projects are over budget and behind schedule. Highway cost allocation is out of balance, which constrains the ability for lawmakers to address ODOT's budget woes. With these obstacles in mind, the committee is likely to take a measured approach to the 2025 investment package. Unlike 2017 where lawmakers approved many new projects and system enhancements, going forward we expect lawmakers to focus on transportation fundamentals like safety, maintenance, and preservation.



Transportation lawmakers were placed in an untenable position during the short session when a trio of bills were introduced to address the current imbalance in highway cost responsibility. Oregon's constitution requires users of passenger vehicles and users of heavy-duty commercial vehicles to pay their respective share of taxes in proportion to their wear and tear on Oregon roads, highways, and bridges. Today, trucking companies are paying significantly more than their fair share: \$193 million per year, or \$528,000 every day. The Joint Committee on Transportation held public hearings on two bills that would decrease the existing rate of weight-mile taxes and another bill that would repeal the weight-mile system outright and replace it with a diesel tax like most other states use. All three bills remained in committee upon adjournment. Trucking companies must now look to Oregon courts for relief until their next chance to address their overpayment in 2025.

## Employment and Workforce

With the bulk of the legislature's focus on addressing dueling housing/homelessness and addiction crises, many other typically active policy areas were relatively quiet.

Senate Bill 1515, alongside SB 1514, work together to make technical changes to and stabilize the recently-implemented Oregon Family Leave Act (OFLA). Senate Bill 1515 aligns the bill with federal law, while SB 1514 gives the Oregon Employment Department flexibility to adjust the program if it lacks six months of funding, as well as requiring regular solvency assessments and public notification before any changes take effect.

Oregon's new pay equity law forbids employers from using pay incentives to recruit employees. For the second session in a row, an effort to modify the law to allow employers to compete with other states failed. House Bill 4050, a coalition effort between businesses, local governments, and other employers, would have brought Oregon into line with other states with pay equity laws. There is significant momentum in both Democratic caucuses to address the issue, and conversations will continue through the interim.

## Education

The desperate need for funding reform dominated all other policy considerations during the session. Despite forward movement on addressing the high cost disability grant, students experiencing homelessness, and the need to raise the artificial cap on identifying students with special education needs, none of those concepts passed this session. Instead legislators invested in a review of the Quality Education Model (QED) and additional staff to address funding reform for 2025. Legislators also funded \$30 million towards summer learning grants - only 60% of what was requested at the same moment national experts pointed to Oregon as struggling to recover from the pandemic learning loss. The efforts in the interim are expected to focus on reforming the funding formula.



## Campaign Finance Reform

One of the biggest surprises this session was passage of campaign finance limitations negotiated by business and labor and approved by a majority of Democrats and Republicans. Oregon now will remove itself from the small list of states without any campaign contribution limits.

The bill, which was still in flux days before Sine Die, was passed by the Senate and House with wide bipartisan margins. Passage of the legislation will head off an expected dueling initiative campaign this fall once signed by the Governor.

The bill creates a series of limits for individual donors and groups. Individuals would be limited to \$3,300 in donations for state and local candidates per election, mirroring federal contribution limits. Small-donor committees that only accept individual contributions of up to \$250 per donor would be allowed to donate up to \$33,000 to state and local candidates per election.

Membership committees formed by business or advocacy groups would have a per candidate donation limit of \$16,500 per election or \$33,000 for both a primary and general election. Any independent groups that spend \$50,000 or more would be required to identify individual donors who gave \$5,000 or more to the group.

The new limits would apply to donors and campaigns starting in January of 2027.



## Arts Organization Funding

Lawmakers earmarked nearly \$6 million to provide ‘resiliency’ funding to struggling arts organizations still trying to find their footing after the pandemic. Funding will go to the Oregon Shakespeare Festival, High Desert Museum, Portland Art Museum, Portland Opera, Portland Center Stage, Oregon Ballet Theatre and Oregon Symphony

Funding ranged from \$342,000 for the Oregon Ballet Theater to \$2.56 million for the Oregon Shakespeare Festival.

Some capital projects were also funded including \$1.5 million to the Portland Japanese Garden’s Japan Institute project, \$1 million for the Clatsop County Historical Society to expand the Oregon Film Museum and \$900,000 for the Black United Fund of Oregon to build a United Futures Complex. Not included was a \$2 million capital request by the High Desert Museum as part of a major expansion project.



# 2024 SAMTD PRIORITIES



### SB 1553 - Public Transit Worker Safety

**PASSED.** With drug use on transit vehicles and facilities increasing across the state, transit advocates urged lawmakers to help address the issue, knowing the impact it was having on transit riders and staff.

SB 1553 sought to increase the penalties for using drugs in and around transit vehicles and enclosed bus stops or facilities. While lawmakers were tackling this issue generally in changes to implementing M110, legislative leadership believed that transit was experiencing unique challenges with drug use and required a separate fix. SB 1553 would apply the crime of Interfering with Public Transportation (IPT), a Class A misdemeanor, to the use of illicit drugs on public transit vehicles. The bill would also classify drug use on transit as a drug-designated misdemeanor, allowing individuals convicted of the crime to access state funded treatment in many instances. The original version of the bill would apply in transit facilities (enclosed bus stops, etc.) but that was removed in a compromise due to stakeholder concerns.

We will continue to monitor the implementation of this law and be prepared to offer comments if required.

### HB 4072 - State Payments for City of Salem Services

**DID NOT PASS.** HB 4072 would have required the Department of Administrative Services to pay fees to the City of Salem for usage of police, fire, and emergency services. The City of Salem hosts many state administrative buildings, but those properties are exempt from the property taxation that typically supports city services. Despite providing most police, fire, and emergency services to these state-owned properties, the City of Salem is not compensated for those services. The bill carried a \$10 million fiscal impact to administer the new fee program. HB 4072 remained in the House Committee on Revenue upon adjournment.





# 2024 SAMTD PRIORITIES



### SB 1572 - WES Commuter line

**PASSED to Ways and Means but NOT FUNDED.** SB 1572 was the result of a joint effort between a bipartisan group led by Sen. Aaron Woods (D-Wilsonville), Rep. Kevin Mannix (R-Salem) and Rep. Tom Andersen (D-Salem) and included a wide range of cities, transit districts and stakeholders impacted by the Westside Express commuter line. The bill proposed the creation of a feasibility study for extending the Westside Express commuter line to Salem and was met with broad support and no opposition in the Capitol.



Cherriots Board President Maria Hinojos Pressey testified in support of the bill during a public hearing early in session along with Mayors and legislators from the area.

Despite this coalition effort and a successful passage into the Ways and Means Committee, lawmakers failed to fund the bill. We will continue to monitor opportunities to implement the study in preparations for the 2025 transportation package.

### HB 4067 - Task Force on Electric Micromobility

**DID NOT PASS.** This bill would have established a new Task Force aimed at studying electric micromobility devices and reporting back on existing laws, safety requirements, commercial uses, statutory definitions, and best practices for operation. In recent years, the number of shared mobility systems like bikeshares and e-scooters has skyrocketed. While many cities and transportation districts welcome micromobility devices as a solution to getting active transportation passengers to their final destination, there is also a recognition that the public desires more education, outreach, enforcement, and support of electric micromobility. Despite broad support, HB 4067 remained in Ways and Means upon adjournment

#### Popular types of micromobility





# 2024 SESSION TEAM



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Salem Area Mass Transit District  
**Board of Directors Meeting**  
February 22, 2024

**Index of Board Actions**

<b><u>Action</u></b>	<b><u>Page</u></b>
Approve the Consent Calendar .....	3
<b>A. Approval of Minutes</b>	
1. <u>January 25, 2024 Board of Directors Meeting</u>	
<b>B. Routine Business Items</b>	
1. <u>FY 2024 Quarter 2 (FY24 Q2) Reportable Assault Data</u>	
Authorize President Hinojos Pressey to sign the letter in Attachment A, with the edit suggested by Director Lara Midkiff, and submit it to the SKATS Policy Committee .....	4

Salem Area Mass Transit District  
**Board of Directors Meeting Minutes**

Senator Hearing Room: 555 Court St. NE, Salem, Oregon 97301

**February 22, 2024**

Full Video of Board Meeting can be accessed at: [https://www.youtube.com/playlist?list=PLSUQ1gg6M78XRjv71iYD\\_YiUu7ABEx92](https://www.youtube.com/playlist?list=PLSUQ1gg6M78XRjv71iYD_YiUu7ABEx92)

**Attendees:**

Board: Vice-President Ian Davidson, Directors Joaquín Lara Midkiff, Ramiro Navarro Jr., Sadie Carney, Sara Duncan, and Bill Holmstrom. Absent: President Maria Hinojos Pressey

Staff: General Manager Allan Pollock, Deputy General Manager David Trimble, CFO Denise LaRue, CHRO Jaél Rose, CCO Patricia Feeny, CPDO Shofi Ull Azum, Service Planning Manager Chris French, Security and Emergency Management Manager Karen Garcia, Strategic Initiatives Administrator Bobbi Kidd, and Executive Assistant Kirra Pressey.

Guest: ETC institute CEO Chris Tatum and Legal Counsel Sara Sayles (Virtual)

**I. CALL TO ORDER**

**A. Attendance**

Vice-President Davidson called the meeting to order at 5:30 p.m.

Attendance was noted, with President Hinojos Pressey being absent this evening and Vice-President Davidson having been requested to facilitate the meeting.

**B. Safety Moment**

GM Pollock presented a safety moment to commemorate Heart Health Month. He elaborated on the essential ABCs of heart health:

A: Adhere to aspirin regimen as prescribed by your healthcare provider.

B: Maintain optimal control over your blood pressure.

C: Effectively manage your cholesterol levels.

**II. ANNOUNCEMENTS | CHANGES TO THE AGENDA – None**

**III. PRESENTATION(S)**

**A. Customer Satisfaction and Community Value Survey Presentation**

Presenter: CCO Patricia Feeny and ETC Institute CEO Chris Tatum

Staff Report: Pg. 4-109, Addendum #1

CCO Feeny introduced ETC Institute CEO Chris Tatum who presented the Customer Satisfaction and Community Value Survey results. He highlighted that the community overwhelmingly acknowledges the invaluable contribution the District makes to the community. Notably, 93% of bus customers, 85% of community members, and 98% of LIFT users express agreement on the value the District

provides. There were discussions surrounding identified opportunities for improvement, taking into account Cherriots' current performance and the significance of various service factors. Additionally, residents express confidence in the Districts capacity to transport them to essential destinations. Finally, it was noted that a majority of customers advocate for increased funding over the next five years to further enhance the service provided.

**IV. PUBLIC COMMENT – None**

**V. CONSENT CALENDAR**

Presenter: Vice-President Ian Davidson

Staff Report: Pg. 110-118

**A. Approval of Minutes**

1. January 25, 2024 Board of Directors Meeting

**B. Routine Business Items**

1. FY 2024 Quarter 2 (FY24 Q2) Reportable Assault Data

Motion:	<b>Approve the Consent Calendar</b>
Motion By:	<b>Director Bill Holmstrom</b>
Second:	<b>Director Sadie Carney</b>
Vote:	<b>Motion Passed Unanimously</b>

**VI. ITEMS DEFERRED FROM THE CONSENT CALENDAR – None**

**VII. ACTION ITEMS**

- A.** Authorize President Hinojos Pressey to sign the letter in Attachment A and submit it to the SKATS Policy Committee

Presenter: Director Sadie Carney

Staff Report: Pg. 119-122

Director Carney reiterated the purpose behind submitting the letter of support to the Salem Keizer Area Transportation Study (SKATS) Policy Committee, emphasizing her openness to suggestions and input from the Board. After discussion from Board Members it was decided to remove the final line of the letter “in the best way possible.”

Motion:	<b>Authorize President Hinojos Pressey to sign the letter in Attachment A, with the edit suggested by Director Lara Midkiff, and submit it to the SKATS Policy Committee.</b>
Motion By:	<b>Director Joaquín Lara Midkiff</b>
Second:	<b>Director Sara Duncan</b>
Vote:	<b>Motion Passed Unanimously</b>

## **VIII. INFORMATIONAL REPORTS**

### **A. FY24 Q2 Strategic Plan Report**

Presenter: Strategic Initiatives Administrator Bobbi Kidd

Staff Report: 123-131

Strategic Initiatives Administrator Kidd delivered a concise overview of the District's guiding principles and 2024 Success Outcomes. She emphasized key organizational tactics currently in place and elaborated on the measures taken to prepare for the FY25 Strategic Plan.

### **B. FY24 Q2 Performance Report**

Presenter: CPDO Shofi Ull Azum

Staff Report: 132-146

CPDO Ull Azum presented the FY24 Q2 Performance Report, outlining various key metrics. He highlighted notable ridership trends, indicating a significant 19.3% increase in total boardings from FY23 Q2. Additionally, he delved into route productivity, offering a breakdown of boardings per route, per revenue hour. Finally, he addressed trends observed in Cherriots LIFT, Shop and Ride, and Van Pool services

### **C. FY24 Q2 Finance Report**

Presenter: CFO Denise LaRue

Staff Report: 147-152

CFO LaRue presented the FY24 Q2 Finance report, covering various financial aspects. She discussed ongoing and forthcoming audits and offered a succinct overview of the General Fund, Transportation Program, and Capital Fund financial performance year-to-date.

## **IX. GENERAL MANAGER'S REPORT**

GM Pollock provided the General Manager's Report, highlighting that SB 1572 passed out of committee unanimously and has progressed to the next step.

## **X. BOARD OF DIRECTORS REPORT**

Vice-President Davidson and Directors provided reports on committees and activities in which they represent SAMTD.

## **XI. ADJOURN**

Vice-President Davidson adjourned the meeting at 8:16 p.m.

**Respectfully Submitted**

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**Maria Hinojos Pressey, Board President**



Salem Area Mass Transit District  
**Board of Directors Work Session Minutes**

Senator Hearing Room: 555 Court St. NE, Salem, Oregon 97301

**March 14, 2024**

**Attendees:**

Board: President Maria Hinojos Pressey, Directors Joaquín Lara Midkiff, Ramiro Navarro Jr., Sadie Carney, Ian Davidson, Sara Duncan, and Bill Holmstrom.

Staff: General Manager Allan Pollock, Deputy General Manager David Trimble, CFO Denise LaRue, CHRO Jaél Rose, CCO Patricia Feeny, CPDO Shofi Ull Azum, COO Tom Dietz, and Executive Assistant Kirra Pressey.

Guest: Equity Educator at Chemeketa Jon Mathis, and Director of the Homeownership Division at Oregon Housing and Community Services Keeble Giscombe

**I. CALL TO ORDER**

President Maria Hinojos Pressey called the work session to order at 5:36 PM  
Attendance was noted.

**A. Safety Moment**

General Manager Pollock provided the Safety Moment, offering valuable tips and tricks for drivers and pedestrians to ensure safety in and around school districts.

**B. Announcements – None**

**II. PRESENTATION(S) | DISCUSSION(S)**

**A. DEI Training**

Presenter: Equity Educator at Chemeketa Jon Mathis, and Director of the Homeownership Division at Oregon Housing and Community Services Keeble Giscombe

Staff Report: Pg. 3-12

CHRO Rose introduced both DEI Trainers for the evening, Jon Mathis and Keeble Giscombe. Both provided a high level, condensed DEI training to the Board, as a preview of the training the Districts internal DEI Committee will begin next week.

### III. GENERAL MANAGER COMMENTS

A. Upcoming Board Agenda Items

B. Board Calendar Review

Presenter: GM Pollock

Staff Report: Pg. 13-14

GM Pollock discussed upcoming Board agenda items and calendar events. He made special note of the upcoming Transit Operator and Maintenance Employee Appreciation Day on Monday, March 18<sup>th</sup>, inviting the Board to come by and join in the celebration.

### IV. WORK SESSION ADJOURNED

President Maria Hinojos Pressey Adjourned the work session at 7:29 PM.

DRAFT





## BOARD MEETING MEMO

Agenda Item V.B.1

**To:** Board of Directors  
**From:** Ross Aguilar, IT Manager  
David Trimble, Deputy General Manager  
**Thru:** Allan Pollock, General Manager  
**Date:** March 28, 2024  
**Subject:** Authorize the General Manager to Execute a Contract with Comcast Enterprise Services for Internet Services

---

### ISSUE

Shall the Board authorize the General Manager to execute a five-year contract with Comcast Business for internet services for an amount not to exceed \$302,610?

### BACKGROUND AND FINDINGS

Salem Area Mass Transit District (District) contracts with Comcast Business to provide business internet services to Courthouse Square, Del Webb and Keizer Transit Center facilities. This internet connection serves as a vital component of the Districts infrastructure facilitating the delivery of core business services to both staff and customers. Moreover, it establishes a secure link between buildings enabling the District to transition between facilities seamlessly while ensuring uninterrupted operations.

The District has maintained an agreement with Comcast Business for business internet services since 2016. Comcast Business has consistently delivered reliable internet services to the District throughout the duration of the agreements. With the growing dependence on internet services, there is an increased demand for bandwidth. To address this demand, the updated agreement will increase the bandwidth at Del Webb from 500Mbps to 1000Mbps. Additionally, the updated agreement will supersede the previous agreement and introduce a new five (5) year term.

Comcast Business serves as the exclusive provider of business internet services for the Salem area. The pricing offered by Comcast Business pricing remains consistent with the independent cost evaluation conducted prior to the renewal.

**FINANCIAL IMPACT**

The total cost of this new agreement, spanning from FY24 to FY29, including contingency for taxes and fees, amounts to \$302,610.

	Year 1	Year 2	Year 3	Year 4	Year 5
Cost	\$51,290	\$51,290	\$51,290	\$51,290	\$51,290
Contingency	\$9,232	\$9,232	\$9,232	\$9,232	\$9,232
<b>Total</b>	<b>\$60,522</b>	<b>\$60,522</b>	<b>\$60,522</b>	<b>\$60,522</b>	<b>\$60,522</b>
<b>GRAND TOTAL</b>					<b>\$302,610</b>

Funding for this proposed contract will be allocated from the District’s General Fund Budget for FY24 and will be maintained in subsequent annual budgets.

**RECOMMENDATION**

Staff recommends the Board authorize the General Manager to execute a five-year contract with Comcast Business for internet services for an amount not to exceed \$302,610.

**PROPOSED MOTION**

**I move that the Board authorize the General Manager to execute a five-year contract with Comcast Business for internet services for an amount not to exceed \$302,610 (three hundred two thousand six hundred and ten dollars).**



## BOARD MEETING MEMO

Agenda Item V.B.2

**To:** Board of Directors  
**From:** Jaél Rose, Chief Human Resources Officer  
**Thru:** Allan Pollock, General Manager  
**Date:** March 28, 2024  
**Subject:** Authorize the General Manager to Execute a Contract with Qcera Inc. for Provision of Family Medical Leave Management Software Services

---

### ISSUE

Shall the Board authorize the General Manager to execute a contract with Qcera, Inc. for the provision of Family Medical Leave Management Software Services through their software *Leave Source* for an amount not to exceed \$162,500?

### BACKGROUND AND FINDINGS

The District administers a number of State and Federally-mandated protected leave benefits for its employees. Presently, each mandated leave is processed manually by Human Resources (HR) staff using multiple different spreadsheets, data tables and calendar systems. As State and Federal regulations become increasingly intricate and subject to frequent amendments, the District is confronted with heightened exposure to litigation risks concerning mandated leave and disability rights. In response, the District is actively pursuing the implementation of a comprehensive Protected Leave & Disability Case Management Software Solution. This solution aims to streamline the planning, response, and management processes associated with protected leave designations, disability accommodations, and records management. The system provider will provide the following key leave management tracking capabilities:

- a. Family and Medical Leave Act, Leave Management;
- b. Oregon Family Leave Act, Leave Management;
- c. Paid Leave Oregon, Leave Management;
- d. Pregnancy Disability, Leave Management;
- e. Temporary Modified Work, Case Management;
- f. Reasonable Accommodation, Case Management;
- g. Workers' Compensation Leave, Case Management;
- h. Other types of protected related leave, Case Management;
- i. Letter templates and;

- j. Auto generated notices;
- k. Standard reporting tools with Ad Hoc capabilities;
- l. Real-time compliance updates for Federal and State Laws; and
- m. Integration with employer policies and procedures.

In October, 2023, the District issued a request for proposal (RFP) for a Protected Leave / Disability Management System. Two responses were received. After careful review by an internal selection committee, Qcera, Inc. was selected as the proposer who most closely met the requirements of the RFP.

### FINANCIAL IMPACT

The contract with the software service would be for three years with two one-year renewal options.

System Installation	\$ 17,000
Year 1 System Maintenance & Licenses	\$ 29,100
Year 2 System Maintenance & Licenses	\$ 29,100
Year 3 System Maintenance & Licenses	\$ 29,100
<b>Base Contract Sub Total</b>	<b>\$ 104,300</b>
Year 4 System Maintenance & Licenses	\$ 29,100
Year 5 System Maintenance & Licenses	\$ 29,100
<b>Options Years 4-5 Sub-total</b>	<b>\$ 58,200</b>
<b>Total 5 year Cost</b>	<b>\$ 162,500</b>

Funding for Year 1 for system installation and system maintenance and licenses is included, in the FY 24 General Fund Adopted Budget. Funding for each subsequent contract year will be included in the General Fund Budget of each respective fiscal year.

### RECOMMENDATION

Staff recommends the Board authorize the General Manager to execute a contract with Qcera, Inc. to provide a Protected Leave / Disability Management System for a total cost of \$162,500.

### PROPOSED MOTION

**I move that the Board authorize the General Manager to execute a contract with Qcera, Inc. to provide a Protected Leave / Disability Management System for a total not to exceed \$162,500 (one hundred sixty-two thousand, five hundred dollars).**



## BOARD MEETING MEMO

Agenda Item VII.A

**To:** Board of Directors

**From:** Jim Row, Chair, Statewide Transportation Improvement Fund Advisory Committee (STIFAC)  
Shofi Ull Azum, Chief Planning and Development Officer

**Thru:** Allan Pollock, General Manager

**Date:** March 28, 2024

**Subject:** STIFAC recommendation to adopt Coordinated Public Transit – Human Services Transportation Plan for Marion and Polk counties and Section 5310 Program Management Plan updates.

---

### ISSUE

Shall the Board accept the recommendation from the STIFAC to adopt Coordinated Public Transit – Human Services Transportation Plan for Marion and Polk counties and Section 5310 Program Management Plan updates as presented in Attachments A and B?

### BACKGROUND AND FINDINGS

The Federal Transit Administration (FTA) and the Oregon Department of Transportation (ODOT) require recipients of FTA Section 5310 (Enhanced Mobility of Seniors & Individuals with Disabilities) program funds to engage in a coordinated planning process to identify prioritized transit investments and strategies benefitting seniors and individuals with disabilities. The coordination must be documented in a Coordinated Public Transit – Human Services Transportation Plan (“the Coordinated Plan”). In Oregon, the Qualified Entities (QE) of Statewide Transportation Improvement Funds (STIF) are responsible for developing and maintaining Coordinated Plans. Salem Area Mass Transit District (District) is the QE for Marion and Polk counties.

### Coordinated Plan Update

The Coordinated Plan serves as a guiding document to support coordination between public agencies, human service providers, and community leaders to help meet the transportation needs of older adults, people with disabilities, and people with low incomes. Additionally, it serves to guide financial investment decisions by the District Board of Directors. It also establishes local and regional agencies’ eligibility for federal and state funding opportunities through the FTA’s Section 5310 program and Oregon’s STIF

grant program. The District, as the QE receiving STIF funds in Marion and Polk counties, determines how the Section 5310 and STIF dollars are applied to its own services and to eligible sub-recipients, including non-profit and private providers, in order to meet regional needs.

The current Coordinated Plan was adopted by the Board in August 2016 with a minor branding update in 2019. The document should be updated every five years to fulfill state and federal funding requirements. This was not possible due to the COVID-19 pandemic.

Transportation services identified in this plan are funded mostly by state and federal sources. The District paid for this update to the Coordinated Plan with General Fund dollars. Kittelson and Associates began work in February 2023 and is concluding the document update with a presentation to the Board. The scope of work for the update included the following elements:

1. Demographic and transit market analysis;
2. Transit and human services provider research;
3. Public outreach;
4. Formation of goals and objectives based on public input; and
5. Producing the updated Coordinated Plan.

The final draft of the updated Coordinated Plan is provided in Attachment A. An essential component to this document is a list of unmet needs and the strategies and priorities to meet those needs. To assist in the expansion and re-prioritization of these strategies for the new Coordinated Plan, Kittelson and Associates conducted four public stakeholder events and one formal survey. Staff provided comment forms to any interested member of the public and forwarded the responses to Kittelson as they came in. The four public outreach events were held in Silverton, Salem, and Monmouth in September, October, and November 2023.

Appendix A.1 documents the public outreach performed and supports the needs, strategies, and priorities for the updated plan. This document serves to direct the District Board of Directors and the STIFAC in future funding decisions for projects that benefit seniors, people with disabilities, and low-income populations.

There are a number of logical next steps that the District can take to move forward to implement the plan. Some general strategies, initiatives, and opportunities in the short run would include:

1. Staff to initiate steps to develop a strategy for Coordinated Plan implementation. As needed, the STIFAC and public and private stakeholders will be included in order to gain feedback on the proposal for Coordinated Plan implementation.
2. Begin preparing for the next funding cycles, including developing projects that support the priorities identified in the updated document.

### **Section 5310 Program Management Plan Update**

Due to the size of the Salem-Keizer urbanized area being over 200,000 population, the District is a designated recipient of FTA Section 5310 funds. The District also receives funds through the ODOT 5310 program for urban and rural projects. The Section 5310 Program Management Plan (PMP) addresses only the Section 5310 dollars obtained directly from the FTA.

The Section 5310 PMP articulates a vision for the Districts 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. The focus of Section 5310 programs is to provide transportation for seniors and individuals with disabilities where public transportation is insufficient, inappropriate, or unavailable.

The Section 5310 PMP must be updated to reflect the changes of the Coordinated Plan, but the STIFAC concurred with staff's recommendation that there be a change in the process for selecting and awarding these grant funds. This new document proposes to remove a redundant committee called the Technical Advisory Committee (TAC). This committee in the current process reviews and makes a recommendation to the STIFAC, which then makes the final recommendation to the District Board of Directors. The TAC is made up of all of the STIFAC members plus up to three others, but in practice, the TAC is an administrative step that is not necessary. The STIFAC voted unanimously at its last meeting in favor of removing the TAC from the process.

### **FINANCIAL IMPACT**

If the document updates are not adopted, grant funding from the FTA and ODOT may be at risk due to the age of the existing documents that may not be honored if they are not up to date.

### **RECOMMENDATION**

The STIFAC recommends that the Board adopt the Coordinated Public Transit – Human Services Transportation Plan for Marion and Polk counties and the Section 5310 Program Management Plan updates as presented in Attachments A and B.

**PROPOSED MOTION**

**I move that the Board adopt the Coordinated Public Transit – Human Services Transportation Plan for Marion and Polk counties and the Section 5310 Program Management Plan updates as recommended by the Statewide Transportation Improvement Fund Advisory committee and presented in Attachments A and B.**





# Salem Area Mass Transit District 2024 Coordinated Plan Update for Marion and Polk Counties

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Board of Directors – 3/28/2024

## Agenda

- Introductions
- Plan Overview & Schedule
- Public Outreach
- Needs & Strategies
- Priorities
- Adoption & Next Steps



- Ted Stonecliffe, PMP
- Chris French



- Susie Wright, PE, PMP – Project Principal
- Krista Purser, PE – Project Manager
- Katie Popp – Transit Planner
- Julie Fischer – Public Involvement Specialist

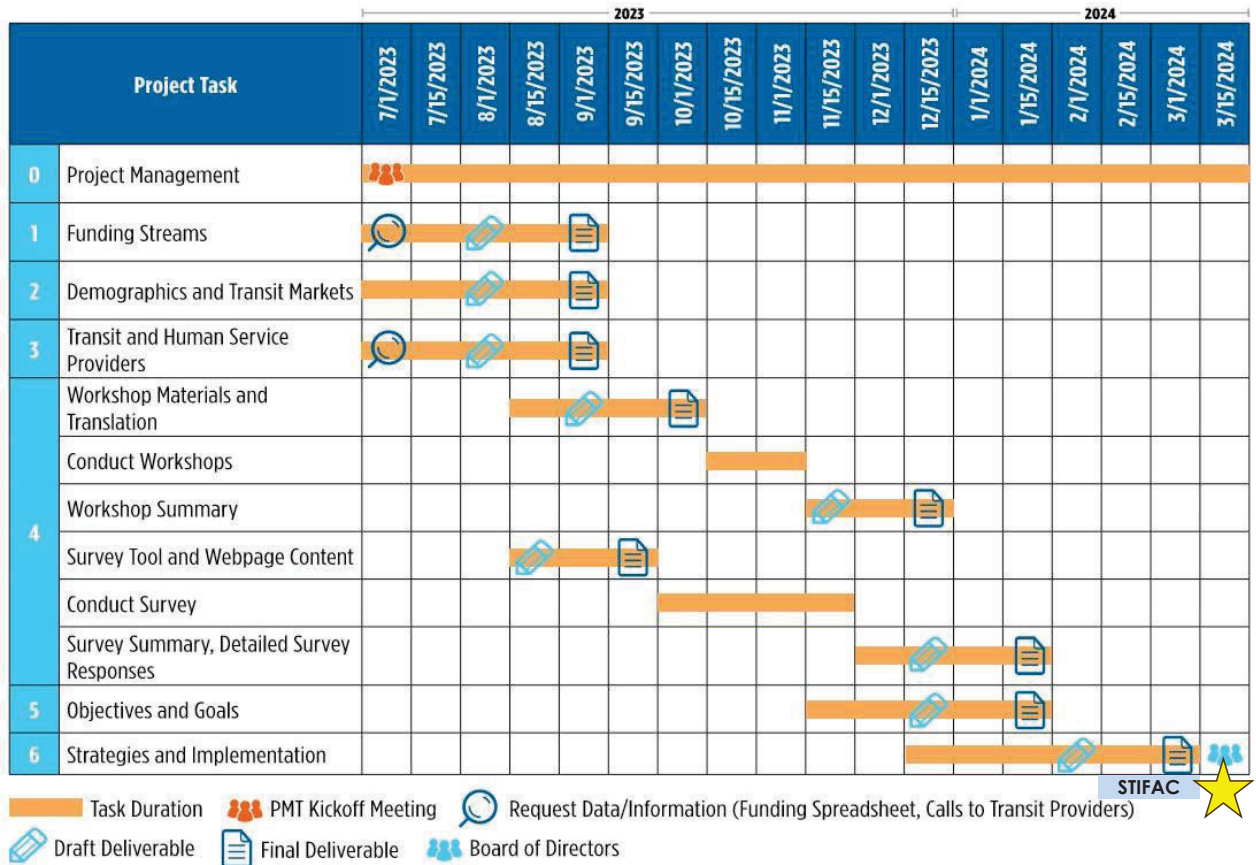
## Plan Overview - What's in a plan?

Identify public transportation needs for people with disabilities and seniors by:

- Updating funding mechanism discussion
- Analyzing recent demographics and transit markets
- Coordinating with other transportation providers
- Conducting community outreach
- Developing goals, objectives, and strategies



# Plan Overview - Schedule



## Community Engagement

### Provider Interviews

- Inventory about rider characteristics, needs, operating statistics, vehicle inventory, client type, trip costs

### Survey

- Survey to gather feedback from current users/users who need transportation services

### Public Workshops

- Five in-person workshops
  - Center 50+ Mobility Fair (Salem)
  - AARP Age Friendly Summit (Monmouth)
  - Silverton Senior Center (Silverton)
  - Monmouth Senior Center (Monmouth)
  - Canyon Community Health Collaborative (Sublimity)
- One virtual workshop



# Needs

- Needs were identified from:
  - Stakeholder interviews
  - Public survey
  - Continued needs from the 2019 Coordinated Plan
- Organized into 6 groups:



Transportation Service Needs



Infrastructure Needs



Coordination and Organizational Needs



Marketing, Customer Service, and Outreach Needs



Technology Needs



Capital and Funding Needs

# What We Heard

## Summary of Needs Identified from Public Engagement



Increased transit service to rural communities, especially to provide access to medical or other life services.



Increased frequency of weekend and evening service.



Outreach, marketing, and education about transit training programs.



Additional coordination for enhancing accessibility of first-and last-mile travel, including more flexibility for deviated routes.



Safer and more comfortable transit stops.



Support for or enhancement of volunteer driver programs.



Additional coordination between transit programs, including medical service vans.

## Priorities

- **Maintaining and/or enhancing existing services** to connect rural locations in Marion and Polk counties with Salem-Keizer and Portland.
- **Providing adequate capital replacements** and maintenance of vehicles and other fundamental requirements to provide service.
- **Providing on-demand services** such as dial-a-ride, door-to-door services, especially when going to and from quality-of-life destinations such as medical, shopping, local appointments, and visiting family and friends
- **Conducting active outreach**, travel training, and marketing to seniors and individuals with disabilities in all the communities served by the District.
- **Enhancing safety and security** on buses, at bus stops, and at transit centers to make people feel like they can travel safely.

## Priorities

- **Increasing reliability and on-time performance** of on-demand services including Cherriots LIFT.
- **Partnering with local jurisdictions to build accessible routes** to bus stops and transit centers, and to make all bus stops compliant with the Americans with Disabilities Act (ADA).
- **Implementing an electronic fare system** that works across multiple jurisdictions and services.
- **Maintaining affordability** of transit services, especially for dial-a-ride services.

# Strategies

- Developed based on identified needs, often address more than one need
- Example below, with each “need” area having its own section

Unmet Transportation Needs	Corresponding Strategies
<b>Transportation Service</b>	
<ul style="list-style-type: none"> <li>■ Increase service hours and frequency               <ul style="list-style-type: none"> <li>» Expand service into the early morning and later evening</li> <li>» Increase weekend and holiday service</li> <li>» Increase frequency of commuter and midday (10 a.m. – 2 p.m.) routes</li> </ul> </li> <li>■ Increase service coverage in both rural and urban areas of Marion and Polk counties</li> </ul>	<ul style="list-style-type: none"> <li>■ Sustain current service levels, considering equity and service performance.</li> <li>■ As funding allows, implement the Long Range Transit Plan (LRTP) and other recent plans.</li> <li>■ Follow Cherriots Service Guidelines to address gaps in public transit services.</li> <li>■ Identify areas with the greatest need for additional or enhanced transit services and apply new funding towards these identified needs.</li> </ul>

# Next Steps

- Seeking Board Adoption
- Use 2024 Coordinated Plan as a guide for needs and potential investments, alongside other plans and initiatives
- Next Coordinated Plan update in 2028



# Coordinated Public Transit - Human Services Transportation Plan for Marion and Polk counties



March 2024

## ACKNOWLEDGEMENTS

Cherriots appreciates the input, energy, and commitment of local and regional stakeholders who participated in this plan update. The following organizations and individuals made significant contributions toward this effort:

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### Cherriots Statewide Transportation Improvement Fund (STIF) Advisory Committee

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- Jim Row (Chair)
- Marja Byers (Vice-Chair)
- Kyle Miller
- Fred Evander
- Steve Dobrinich
- Kimberly Dwyer
- Steve Anderson
- Dodie Brockamp
- M. Bryant Baird
- Beth Schmidt

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### Cherriots Outreach Participants

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- Transportation Providers
- Health care and Human Service Providers
- City and County Staff
- Service Integration Teams (Sits)
- Senior Center Staff
- Event Participants
- Cherriots Riders

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### Cherriots Project Management Team (PMT)

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- Ted Stonecliffe, PMP – Cherriots
- Chris French – Cherriots
- Krista Purser – Kittelson & Associates, Inc.
- Susan Wright – Kittelson & Associates, Inc.
- Katie Popp – Kittelson & Associates, Inc.
- Julie Fischer – Cogito Partners



# TABLE OF CONTENTS

Acknowledgements ..... 2

Table of Contents ..... 3

List of Appendices ..... 3

List of Figures ..... 4

List of Tables ..... 4

Acronyms ..... 5

Introduction ..... 6

Chapter 1: Background and Methodology ..... 8

Chapter 2: Service Area and Demographic Profile ..... 12

Chapter 3: Overview of Transit Providers in Marion and Polk Counties ..... 29

Chapter 4. Public Outreach ..... 46

Chapter 5. Goals and Objectives..... 50

Chapter 6. Needs ..... 52

Chapter 7. Priorities and Strategies..... 56

Chapter 8. Looking forward ..... 64

# LIST OF APPENDICES

- **Appendix A:** Public Involvement Summary
- **Appendix B:** Memo #1 – Funding Streams
- **Appendix C:** Memo #2 – Demographics and Transit Market
- **Appendix D:** Memo #3 – Transit Providers
- **Appendix E:** Memo #4 – Goals and Objectives
- **Appendix F:** Sample Grant Applications and Instructions

# LIST OF FIGURES

Figure 1. Coordinated Plan Project Area (Marion and Polk counties, Oregon).....13

Figure 2. Population Density – Marion and Polk counties .....17

Figure 3. Employment Density – Marion and Polk counties.....18

Figure 4. People with Disabilities – Marion and Polk counties.....19

Figure 5. Seniors (Age 65 and Over) – Marion and Polk counties.....20

Figure 6. Youth (17 and Under) – Marion and Polk counties.....21

Figure 7. Below 200% Poverty – Marion and Polk counties.....22

Figure 8. Below 100% Poverty – Marion and Polk counties.....23

Figure 9. People of a Racial/ Ethnic Minority – Marion and Polk counties .....24

Figure 10. Zero Vehicle Households – Marion and Polk counties.....25

Figure 11. Limited English Proficiency – Marion and Polk counties .....26

Figure 12. Veterans – Marion and Polk counties.....27

Figure 13. Multi-Unit Households – Marion and Polk counties.....28

Figure 14. Available Transit Service in Marion and Polk counties .....30

Figure 15. Cherriots Local Network .....35

Figure 16. Cherriots Regional Network .....37

Figure 17. Origin and Destination Map for Cherriots LIFT Customers.....39

Figure 18. Origin and Destination Map for Cherriots LIFT Customers.....40

Figure 19. WTS Fixed Route.....41

Figure 20. WTS Express Route (bi-directional loop).....42

Figure 21. MI Trolley Route (Map provided by MI Trolley).....43

# LIST OF TABLES

Table 1. Transit Dependent Populations (highlighted fields indicate above state averages) .....15

Table 2. Available Service Inventory (2022) .....31

Table 3. Cherriots Local and Cherriots Regional Fares .....36

Table 4. Needs and Strategies .....60

## ACRONYMS

ACS – American Community Survey

FTA – Federal Transit Administration

LEP – Low English Proficiency

NEMT – Non-Emergency Medical Transportation

PMT – Project Management Team

ODOT – Oregon Department of Transportation

SAMTD – Salem Area Mass Transit District

Section 5310 or “§5310” - Section 5310 Enhanced Mobility of Seniors and Individuals with Disabilities Program

STF – Special Transportation Fund

STIF – Statewide Transportation Improvement Fund

STIFAC – Statewide Transportation Improvement Fund Advisory Committee

TAC – Technical Advisory Committee

TSP – Transportation System Plan

UGB – Urban Growth Boundaries

## INTRODUCTION

This document serves as the Coordinated Public Transit – Human Services Transportation Plan (“Coordinated Plan”) for Marion and Polk counties. The Coordinated Plan is developed by the Salem Area Mass Transit District (“District”) and updated every five years to fulfill state and federal funding requirements. The Coordinated Plan serves as a guiding document to support coordination between public agencies, human service providers, and community leaders to help meet the transportation needs of older adults, people with disabilities, and people with low incomes. It also establishes local and regional agencies’ eligibility for federal and state funding opportunities through the Federal Transit Administration’s (FTA’s) Section 5310 (§ 5310) program and Oregon’s Statewide Transportation Improvement Fund (STIF). As the Qualified Entity receiving STIF funds in Marion and Polk counties, the District determines how the § 5310 and STIF dollars are administered to its own services and to eligible subrecipients, including non-profit and private providers, in order to meet regional needs.

The Coordinated Plan is intended to be a resource for coordination between transit providers, human services partners, as well as local, state, and federal agencies that support transportation needs for key populations in Marion and Polk counties. The needs, priorities, and strategies identified throughout the planning process of the Coordinated Plan can be used to guide how § 5310 and STIF dollars are spent to facilitate progress towards ensuring key populations are served as efficiently as possible with a high quality of service. The needs in this plan are categorized into six areas:

- Transportation Service
- Infrastructure
- Coordination and Organizational
- Marketing, Customer Service, and Outreach
- Technology
- Capital and Funding

This Coordinated Plan update also addresses implications of recent changes to transportation programs and services to the focus populations in Marion and Polk counties, with a focus on recent changes to public transit funding in Oregon as well as any enduring impacts from the COVID-19 pandemic that began at the start of 2020, after the 2019 update was adopted.

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

- Chapter 1 introduces the Coordinated Plan process, describes the plan background and methodology, and provides a description of the relevant grant programs.
- Chapter 2 presents the study area and a demographic profile of Marion and Polk counties.
- Chapter 3 is a list of transit providers and human service agencies that operate in Marion and Polk counties and in the adjacent area.
- Chapter 4 provides a summary of the public outreach and resulting findings.

- Chapter 5 presents goals and objectives, derived from outreach findings and study area analysis.
- Chapter 6 presents the needs, also derived from outreach findings and study area analysis.
- Chapter 7 identifies the priorities and strategies for Cherriotics and the regional social service providers to implement in order to deliver transportation services. This chapter also maps the strategies to the applicable transportation needs described in Chapter 6.
- Chapter 8 summarizes the importance of transportation to public health and provides a set of next steps toward plan implementation.



## CHAPTER 1: BACKGROUND AND METHODOLOGY

This Coordinated Plan update process was led by the Salem Area Mass Transit District (“District”), the STIF agency for Marion and Polk counties, under guidance from the Cherriots Board of Directors and the Oregon Department of Transportation (ODOT). The Coordinated Plan was developed in collaboration with transit users, human services agencies, transportation providers, and public agencies and is intended to be flexible to allow for any modifications to support coordination and meet federal and state requirements.

The Cherriots Board of Directors has a Statewide Transportation Improvement Fund (STIF) Advisory Committee (STIFAC) that makes recommendations about formula and discretionary grant distributions funded by Oregon’s STIF funds and federal §5310 funds to improve transportation programs and services for seniors and people with disabilities. The STIFAC was initially set up under a mandate from ODOT, which administered Oregon’s Special Transportation Fund (STF). The STIFAC 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.

The STIFAC convenes quarterly to advise the Board in making recommendations, all of which are focused on meeting transportation needs of seniors and people with disabilities. The STIFAC also receives and makes recommendations on the funding applications for Section 5310 projects every two years. All STIFAC meetings are open to the public, formally noticed by Cherriots, and accessible by Americans with Disabilities Act (ADA) standards.

The following steps were taken to develop the key findings included in this plan update:

- Outreach was conducted 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.
- A survey was available for both current riders and non-riders to provide feedback on their needs and desired service improvements.
- 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 services agencies, representing a diverse group of services and geographies.

The full public involvement summary is included in Appendix A.

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## Coordinated Transportation Plan Requirements

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Oregon administrative rule requires STIF agencies to provide a locally developed, coordinated public transit-human services plan to identify needs, strategies, and funding options to improve services  
Kittelson & Associates, Inc.

and programs for older adults, people with disabilities, and people with low income. ODOT provides the following requirements for Coordinated Public Transit – Human Services Plans:

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

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## Assessing Need and Identifying Proposed Service

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Reflecting legislative priorities identified in the Keep Oregon Moving act, the Coordinated Plan addresses the transportation needs of people residing and traveling within the region, especially those residents in low-income communities. Key project and program provisions of the Coordinated Plan address the following STIF Criteria:

- Increased frequency of bus service to areas with a high percentage of Low-Income Households.
- Expansion of bus routes and bus services to serve areas with a high percentage of Low-Income Households.
- Fund the implementation of programs to reduce fares for public transportation in communities with a high percentage of Low-Income Households.
- Procurement of low or no emission buses.
- The improvement in the frequency and reliability of service between communities inside and outside of the Qualified Entity's service area.
- Coordination between Public Transportation Service Providers to reduce fragmentation in the provision of transportation services.
- Implementation of programs to provide student transit service for students in grades 9-12.

Qualified Entities are mass transit districts, transportation districts, counties, and tribes operating transit service that are eligible to receive STIF funds. The District is the Qualified Entity for Marion and Polk counties, distributing funds within and beyond the Salem-Keizer urban area.

The Coordinated Plan development process includes coordination and engagement with transit users, transit providers, human service agencies, and other non-profit organizations to identify gaps in transportation services and programs that impact mobility of older adults, people with disabilities, and people with low incomes. These engagement activities helped assess available services and identify transportation gaps through an online survey, in-person workshops and activities at

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locations in Marion and Polk counties, and virtual interviews with transit and human service providers.

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## Funding and Relevant Grant Programs

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The District administers several public transportation funding programs focused on older adults and people with disabilities in Marion and Polk counties, including the STIF, §5310 Funds, and other funding related to urban transit systems and revenues within the District's tax boundary. These funding programs support projects and services that enhance the mobility of seniors and persons with disabilities. Section 5310 funds are directed solely toward services open to the general public, while STIF funds can also be used for client-only services and programs enhancing the mobility of low-income individuals.

### Consolidation of STF and STIF Funding

In 2020, the Oregon Legislative Assembly passed Senate Bill 1601, directing the Oregon Department of Transportation (ODOT) to merge the STF and STIF into one public transit funding program. The consolidation of STF into the STIF program took effect on July 1, 2023. The resulting change is intended to reduce redundancies, increase statewide and local administrative efficiency, and improve funding reliability for public transportation programs in Oregon while maintaining the objectives of both funding programs.

The STF historically provided funding for transportation services for seniors and people with disabilities to access health, education, work, social, and recreational opportunities so that seniors and people with disabilities may live as independently and productively as possible. STF funds could also be used for client-only services and other programs enhancing the mobility of low-income individuals. As part of the consolidation process, STIF plan requirements were updated to incorporate fundamental elements of the STF program. As the leading STIF entity, the District continues to have the ability to distribute the federal and state funds to itself and to eligible subrecipients with these changes.

### FTA Enhanced Mobility of Seniors & Individuals with Disabilities Program (§5310)

The Federal Transit Administration (FTA) Enhanced Mobility of Seniors and Individuals with Disabilities (§5310) is a program that provides formula funds to designated recipients to improve mobility for seniors and individuals with disabilities by expanding transportation mobility options. Cherriots is the designated recipient of Federal Transit Administration (FTA)-direct §5310 funds for Marion and Polk counties and ODOT pass-through §5310 funds for non-profit organizations. As a recipient of §5310 funds, Cherriots must develop a Coordinated Plan and update it every 4 to 5 years to meet federal and state requirements. The 2024 Cherriots Coordinated Plan Update for Marion and Polk Counties will serve as the document that meets this requirement.

Kittelson & Associates, Inc.



More information about the FTA Section 5310, STIF, STF, and other rural funding programs can be found in Technical Memo #1: Funding Streams in Appendix B.

## CHAPTER 2: SERVICE AREA AND DEMOGRAPHIC PROFILE

This chapter provides an overview of Marion and Polk counties based on data from the 2020 United States Census and the 2017-2021 American Community Survey (ACS) five-year estimate dataset.

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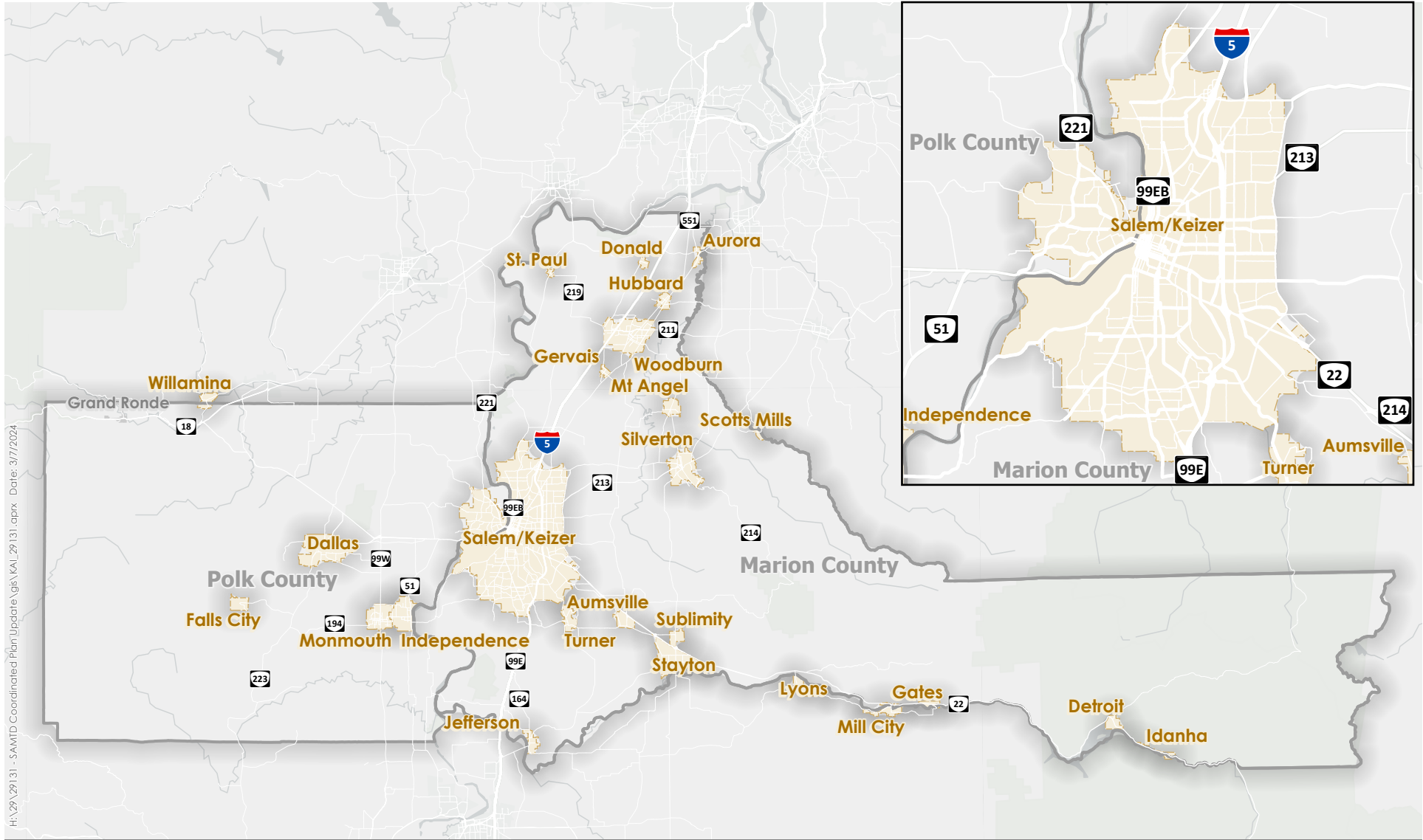
### Service Area

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This Coordinated Plan covers populations of older adults, people with disabilities, and people with low incomes in all rural and urban areas of Marion and Polk counties, including the Salem-Keizer metropolitan area and other population centers within the county. The project area is shown in Figure 1.

Marion and Polk counties cover approximately 1,940 square miles in the heart of the Willamette Valley and are the 5<sup>th</sup> and 13<sup>th</sup> most populated counties in Oregon, respectively. The Salem-Keizer urban growth boundary spans both counties, with most of the urban area being on the Marion County side and the West Salem area on the Polk County side. The City of Salem hosts both the county seat for Marion County and the state capital. The City of Dallas, approximately 15 miles west of Salem, hosts the county seat for Polk County.

As of the 2020 Decennial Census, the population of Marion County is 345,920 and the population of Polk County is 87,433, a total of 433,353 for both counties. Of this population, 214,911 live inside the city boundaries of Salem and Keizer.



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- County
- Urban Growth Boundary (UGB)



Figure 1

**Coordinated Plan Project Area  
Marion and Polk Counties, Oregon**

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## Demographic Profile

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This section provides an overview of demographics and transit markets for Marion and Polk counties. Analyzing the demographic distributions and needs of Marion and Polk counties is vital to evaluating the quality of a transit system and identifying geographic locations of primary transit markets.

Zoom-in maps focused on urban areas are included within Appendix D.

This review discusses the needs for transit dependent populations in Marion and Polk counties, many of whom are low-income individuals, seniors, and people with disabilities. Understanding the needs of transit dependent populations requires more consideration to specific demographic populations beyond typical transit planning metrics such as population density and employment density. The following outlines nine demographic groups typically associated with higher use of transit:

- **People with Disabilities** – people with a disability often have difficulty operating a vehicle and require access to public transportation.
- **Seniors (Age 65 and Over)** – individuals aged 65 and older may become less comfortable driving as they age or have limited physical ability to drive.
- **Youth (Under 18)** – individuals under 18 years old have limited access or ability to drive a vehicle.
- **People Experiencing Poverty** – individuals who live within a set of income thresholds established by the US Census Bureau, which vary by family size and composition. Low-income households tend to rely on public transportation as it is less expensive than owning and operating a vehicle. SAMTD defines a “low-income household” as one with a combined income of 200% Federal Poverty Level or less.
- **People of a Racial/Ethnic Minority** – often live in neighborhoods that have suffered systemic disinvestment and other barriers to transportation.
- **Zero Vehicle Households** – persons residing in households without access to a vehicle typically rely on walking, biking, public transportation, or carpooling to meet their mobility needs.
- **Low English Proficiency Households** – low English proficiency (LEP) can be a barrier for interacting with the transportation system, particularly in terms of owning and operating a vehicle. Typically, LEP households rely on alternative modes to meet their mobility needs.
- **Veterans** – have devoted years of their lives into their respective field of expertise, with many impacted by limited mobility and high medical needs.
- **Number of Multi-Unit Dwellings** – many people of the above demographic groups may live in multi-unit dwellings, including special care facilities for seniors and/or people with disabilities.

Title VI of the Civil Rights Act of 1964 prohibits discrimination in the provision of federally supported benefits and services, including public transportation service. In addition to Title VI populations, this analysis provides information regarding populations who are typically more reliant on transit or have been historically underrepresented in planning processes. These metrics are summarized for

Marion and Polk counties in Table 1. Values higher than the state average are in **bold**. As shown, both Marion and Polk counties have high percentages of people with a disability, seniors (age 65 and over), youth (age under 18), people below the poverty line, racial/ethnic minorities, people with limited English proficiency (LEP), and veterans. Salem and Keizer have patterns consistent with the county demographics.

**Table 1. Transit Dependent Populations (highlighted fields indicate above state averages)**

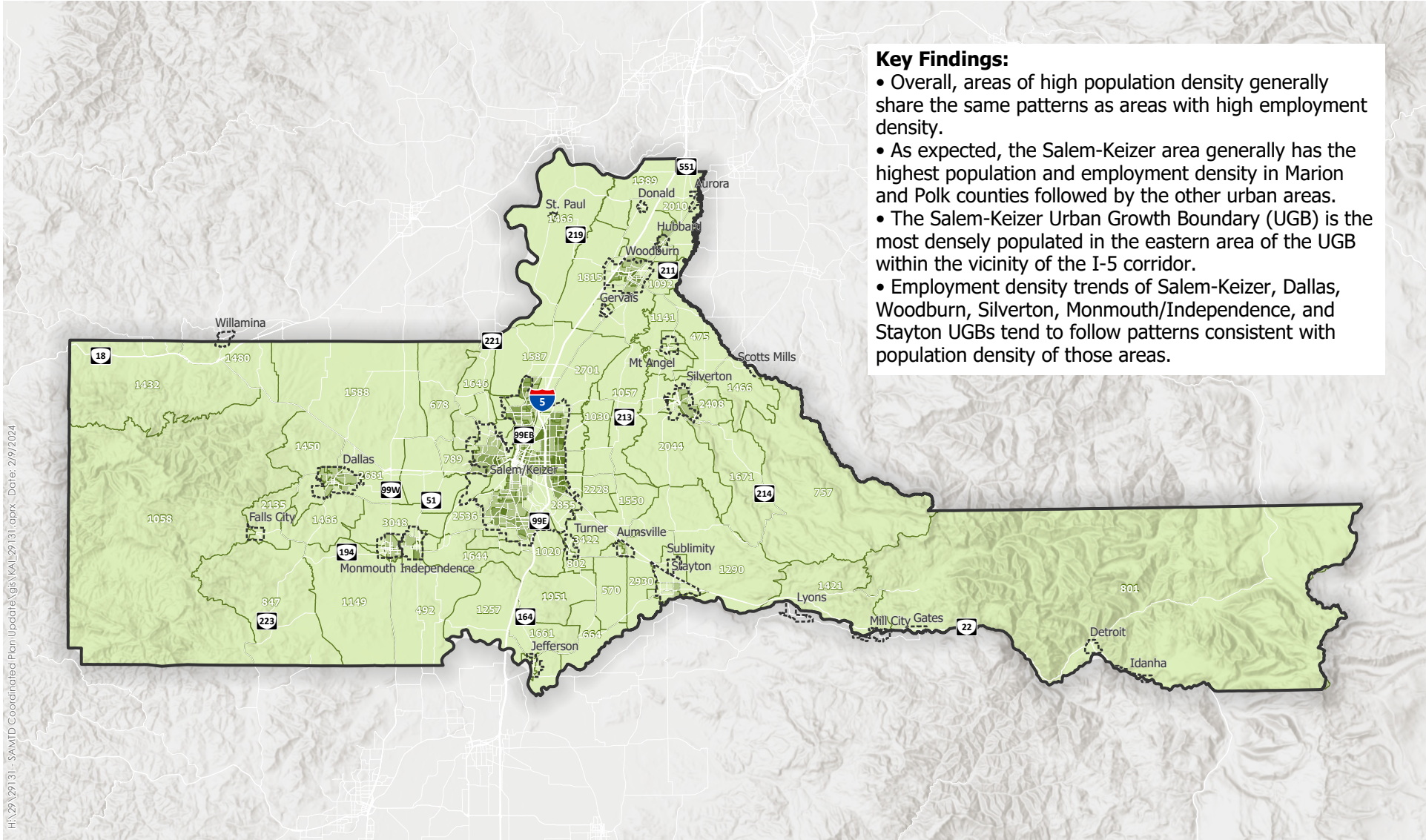
	Total Population (2020 Census)	Total Households (ACS)	People with a Disability	Seniors (65 and older)	Youth (Under 18)	Below 100% Poverty	Below 200% Poverty	Racial/Ethnic Minority	Zero Vehicle Households	People with LEP	Veteran
<b>Oregon</b>	4,237,256	1,658,091	14.5%	17.8%	20.7%	12.1%	28.7%	25.8%	7.1%	2.3%	8.0%
<b>Marion County</b>	345,920	121,132	<b>15.0%</b>	15.8%	<b>24.7%</b>	<b>13.4%</b>	<b>34.4%</b>	<b>36.6%</b>	6.0%	<b>3.7%</b>	7.3%
<b>Polk County</b>	87,433	31,742	<b>14.6%</b>	<b>18.0%</b>	<b>22.4%</b>	12.0%	<b>29.1%</b>	23.4%	5.3%	2.0%	8.6%
<b>Keizer</b>	39,376	14,024	<b>15.6%</b>	14.6%	<b>25.4%</b>	10.4%	28.4%	<b>31.6%</b>	4.7%	<b>2.6%</b>	<b>8.3%</b>
<b>Salem</b>	175,535	64,426	<b>15.2%</b>	14.8%	<b>24.6%</b>	<b>14.7%</b>	<b>35.0%</b>	<b>34.2%</b>	<b>7.7%</b>	<b>3.1%</b>	6.6%

Figures 2-13 show where transit-dependent populations live throughout Marion and Polk counties. Data is taken at the most refined level available (typically block group, with some census-tract). Areas are shaded by the density or percentage of the population/households within that demographic, and labeled with the number of people/households within that demographic. Shading represents approximate quartiles, with 25% of the least dense block groups/census tracts in the lightest shade, up to the 25% most dense block groups/census tracts in the darkest shade. More details about this assessment, including zoom-in maps on urban areas, can be found in Technical Memo #2: Demographics and Transit Markets in Appendix C. Key demographic findings include:

- Population and Employment Density (Figure 2 and Figure 3, respectively). Overall, areas of high population density generally share the same patterns as areas with high employment density. As expected, the Salem-Keizer area generally has the highest population and employment density in Marion and Polk counties followed by the other urban areas. The Salem-Keizer Urban Growth Boundary (UGB) is the most densely populated in the eastern area of the UGB within the vicinity of the I-5 corridor. Employment density trends of Salem-Keizer, Dallas, Woodburn, Silverton, Monmouth/Independence, and Stayton UGBs tend to follow patterns consistent with population density of those areas.
- People with Disabilities (Figure 4). Higher percentages of people with disabilities in:
  - Northeastern part of Polk County
  - Parts of Woodburn, Dallas, Lyons, and Mill City Urban Growth Boundaries (UGBs)

- Seniors (Figure 5).
  - Southeastern area of Polk County
  - Area surrounding Salem UGB to the west and south
  - Sublimity UGB
  - Parts of Dallas and Woodburn UGBs
- Youth (Figure 6)
  - Central and southern parts of Marion County
  - Gervais UGB
  - Parts of Woodburn, Monmouth, Independence, Silverton, and Jefferson UGBs
- People Experiencing Poverty (Figure 7 and Figure 8)
  - High concentrations of people living below 100% poverty exist in the following areas:
    - Northeastern part of Polk County
    - Salem core area
    - Parts of Woodburn, Monmouth, and Dallas UGB
  - High concentrations of people living below 200% poverty exist in the following areas:
    - Central-eastern area of Marion County
    - Salem core area
    - Parts of Woodburn, Stayton, and Falls City UGBs
- People of a Racial/Ethnic Minority (Figure 9)
  - Northern and southern areas of Marion County
  - Northeastern area of Salem-Keizer UGB
  - Woodburn UGB
  - Parts of Monmouth and Stayton UGBs
- Zero Vehicle Households (Figure 10)
  - Parts of Woodburn, Mt. Angel, and Dallas UGBs
  - Central area of Salem-Keizer UGB along the I-5 corridor, in the downtown area, and along Salem Dallas Highway
- Limited English Proficiency Households (Figure 11)
  - Northeastern part of Polk County
  - Areas in Woodburn UGB and the surrounding area to the east
  - Part of the core area of Salem UGB
- Veterans (Figure 12)
  - Eastern and northern parts of Marion County
  - Eastern part of Polk County
  - Area surrounding Salem UGB to the south
  - Area in Woodburn UGB
- Multi-Unit Households (Figure 13)
  - Areas in the Salem downtown core, adjacent to I-5 to the east, and along OR221
  - Areas in Woodburn, Dallas, and Monmouth UGBs
  - Area surrounding Monmouth and Independence UGBs to the north

The federal poverty level is defined by the US Census based on household size. The 2023 federal poverty level for a family of 4 is defined as \$30,000 of income. 200% poverty level for a family of 4 is \$60,000. The state of Oregon uses 200% poverty level for STIF criteria.



**Key Findings:**

- Overall, areas of high population density generally share the same patterns as areas with high employment density.
- As expected, the Salem-Keizer area generally has the highest population and employment density in Marion and Polk counties followed by the other urban areas.
- The Salem-Keizer Urban Growth Boundary (UGB) is the most densely populated in the eastern area of the UGB within the vicinity of the I-5 corridor.
- Employment density trends of Salem-Keizer, Dallas, Woodburn, Silverton, Monmouth/Independence, and Stayton UGBs tend to follow patterns consistent with population density of those areas.

**People per Square Mile by Block Group**

- 2 - 2,194
- 2,195 - 5,116
- 5,117 - 8,763
- 8,764 - 18,139

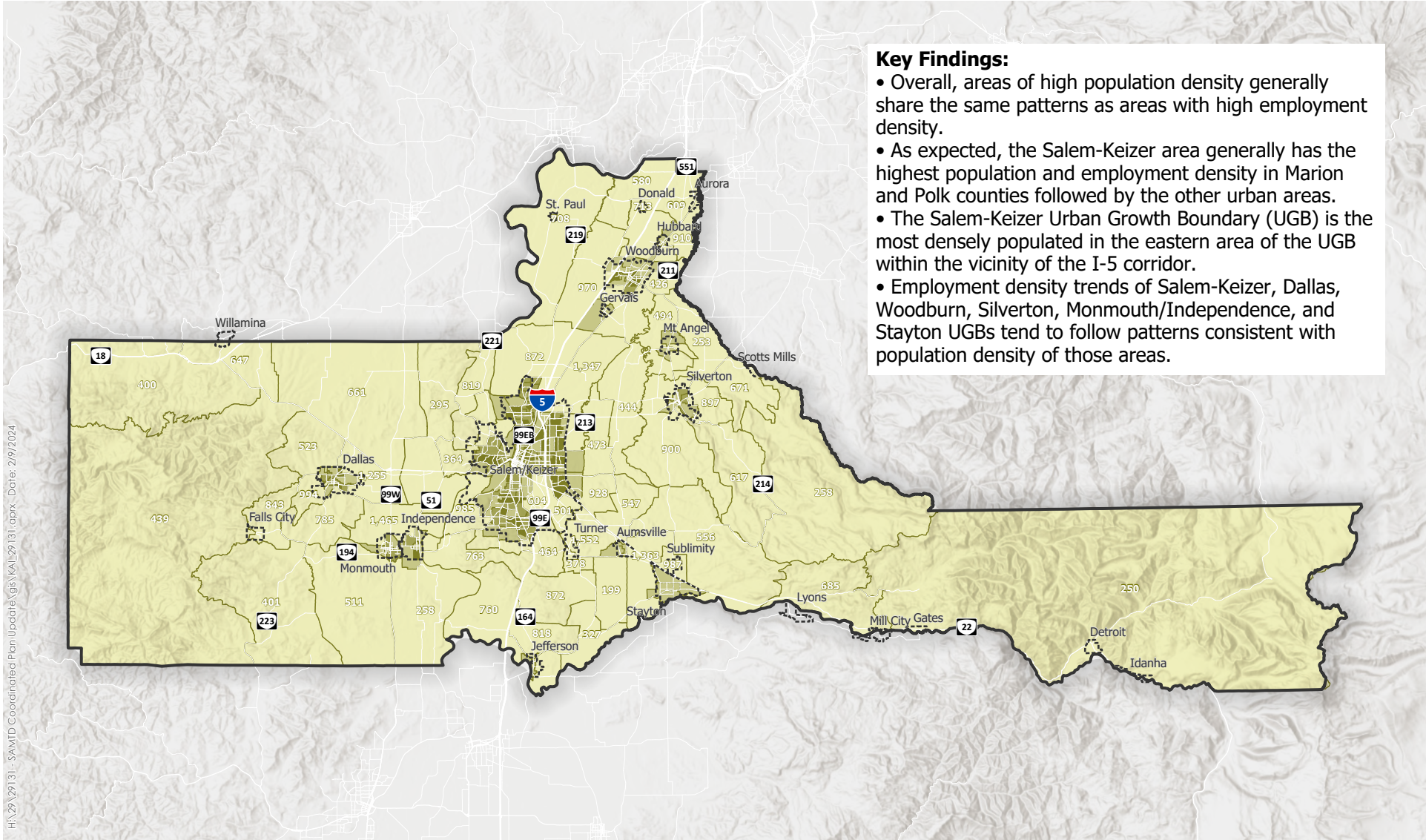
- County Boundary
- UGB



Figure 2

**Population Density  
Marion and Polk Counties**

Values shown in each Block Group indicate total population.







**Key Findings:**

- Overall, areas of high population density generally share the same patterns as areas with high employment density.
- As expected, the Salem-Keizer area generally has the highest population and employment density in Marion and Polk counties followed by the other urban areas.
- The Salem-Keizer Urban Growth Boundary (UGB) is the most densely populated in the eastern area of the UGB within the vicinity of the I-5 corridor.
- Employment density trends of Salem-Keizer, Dallas, Woodburn, Silverton, Monmouth/Independence, and Stayton UGBs tend to follow patterns consistent with population density of those areas.

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**Employed Population per Square Mile by Block Group**

-  1 - 295
-  296 - 1,374
-  1,375 - 2,772
-  2,773 - 11,381



-  County Boundary
-  UGB

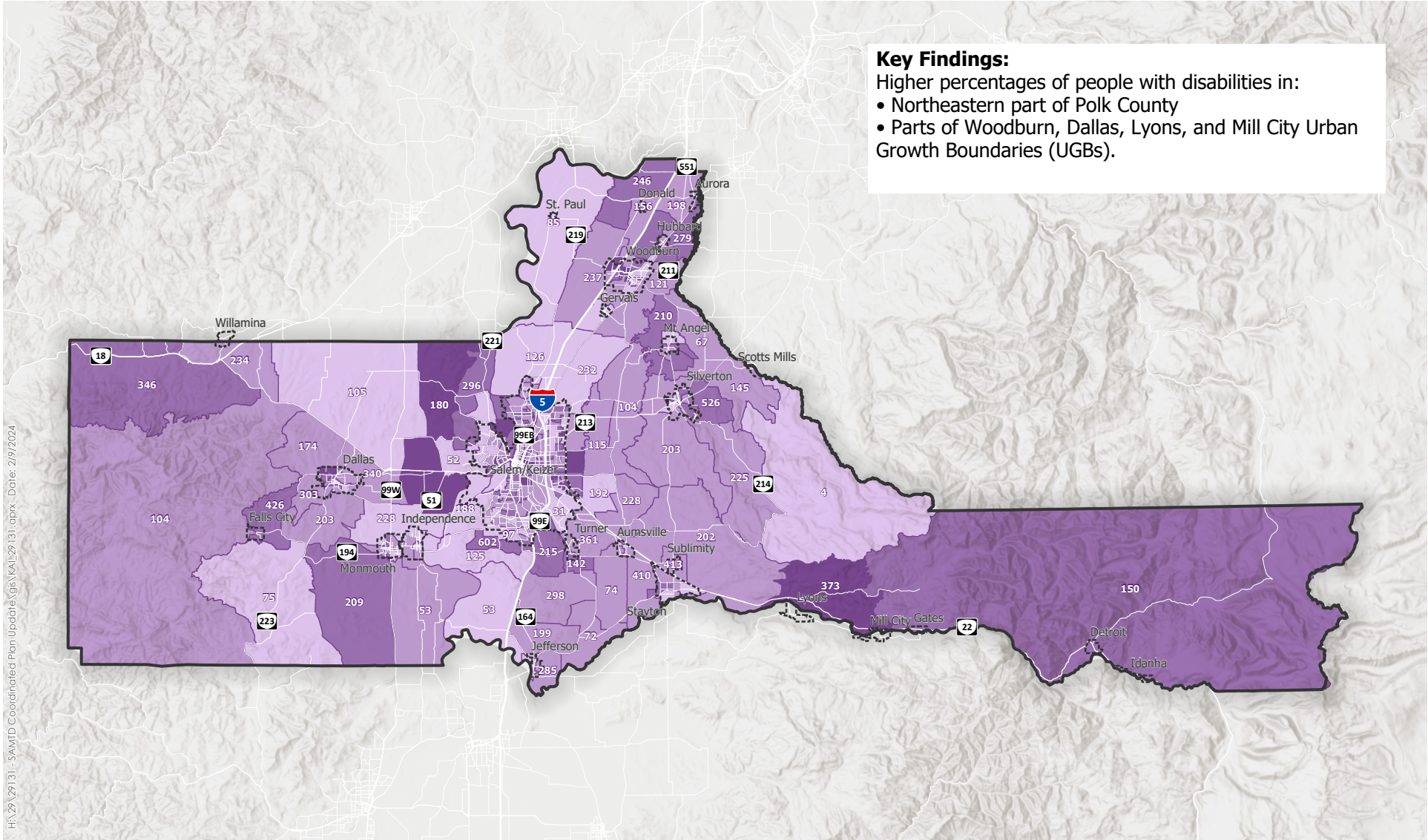


Figure 3

**Employment Density  
Marion and Polk Counties, OR**

Values shown in each Block Group indicate total employment.





**Key Findings:**  
 Higher percentages of people with disabilities in:  
 • Northeastern part of Polk County  
 • Parts of Woodburn, Dallas, Lyons, and Mill City Urban Growth Boundaries (UGBs).

**Percentage of Population with a Disability by Block Group**

- 1% - 9%
- 10% - 16%
- 17% - 24%
- 25% - 40%

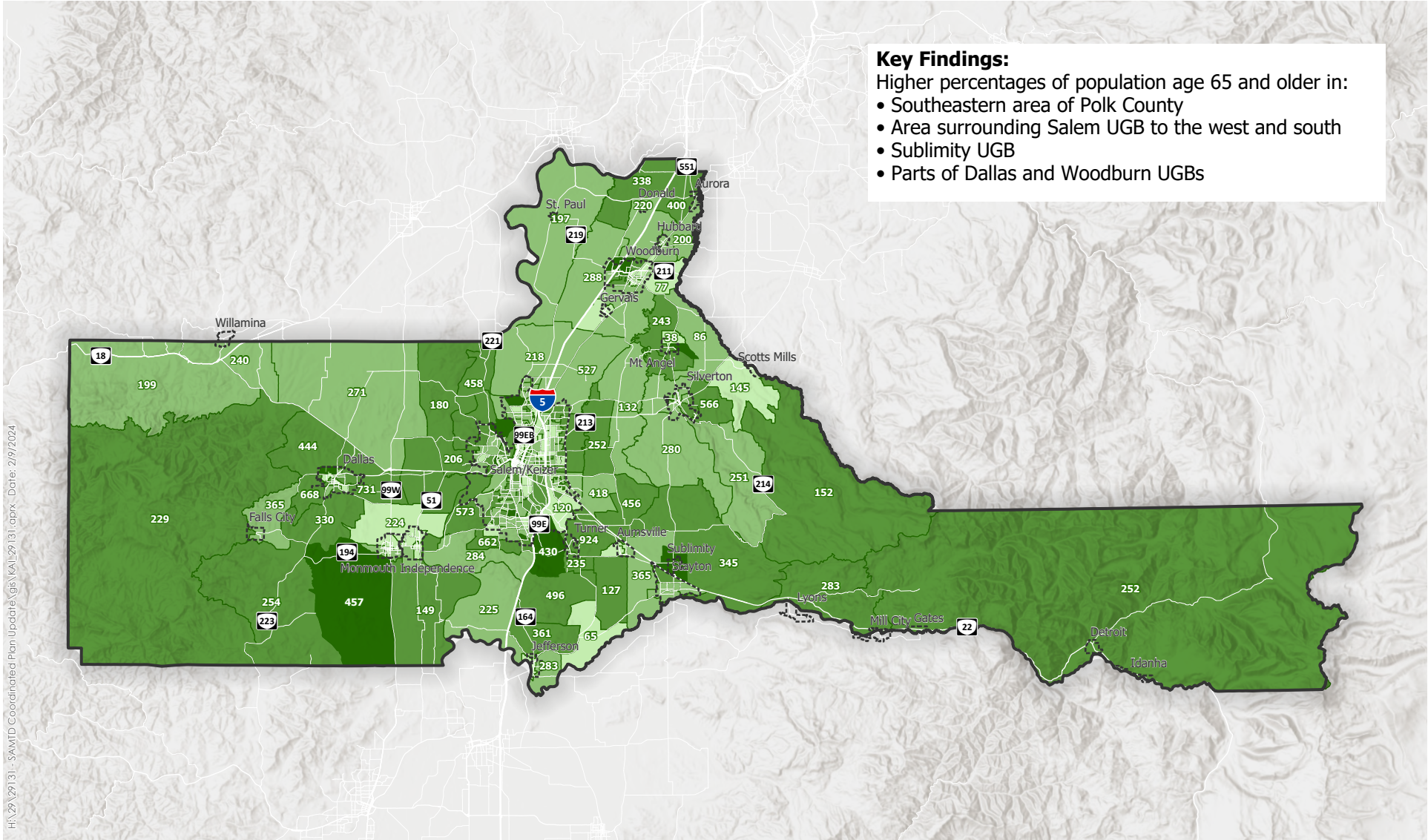
County Boundary  
 UGB

0 20 Miles

Values shown in each Block Group indicate total population with a disability.

Figure 4

**Population with Disabilities  
 Marion and Polk Counties, OR**



**Key Findings:**  
 Higher percentages of population age 65 and older in:

- Southeastern area of Polk County
- Area surrounding Salem UGB to the west and south
- Sublimity UGB
- Parts of Dallas and Woodburn UGBs

**Percentage of Population Age 65 and Over by Block Group**

- 1% - 10%
- 11% - 20%
- 21% - 34%
- 35% - 76%

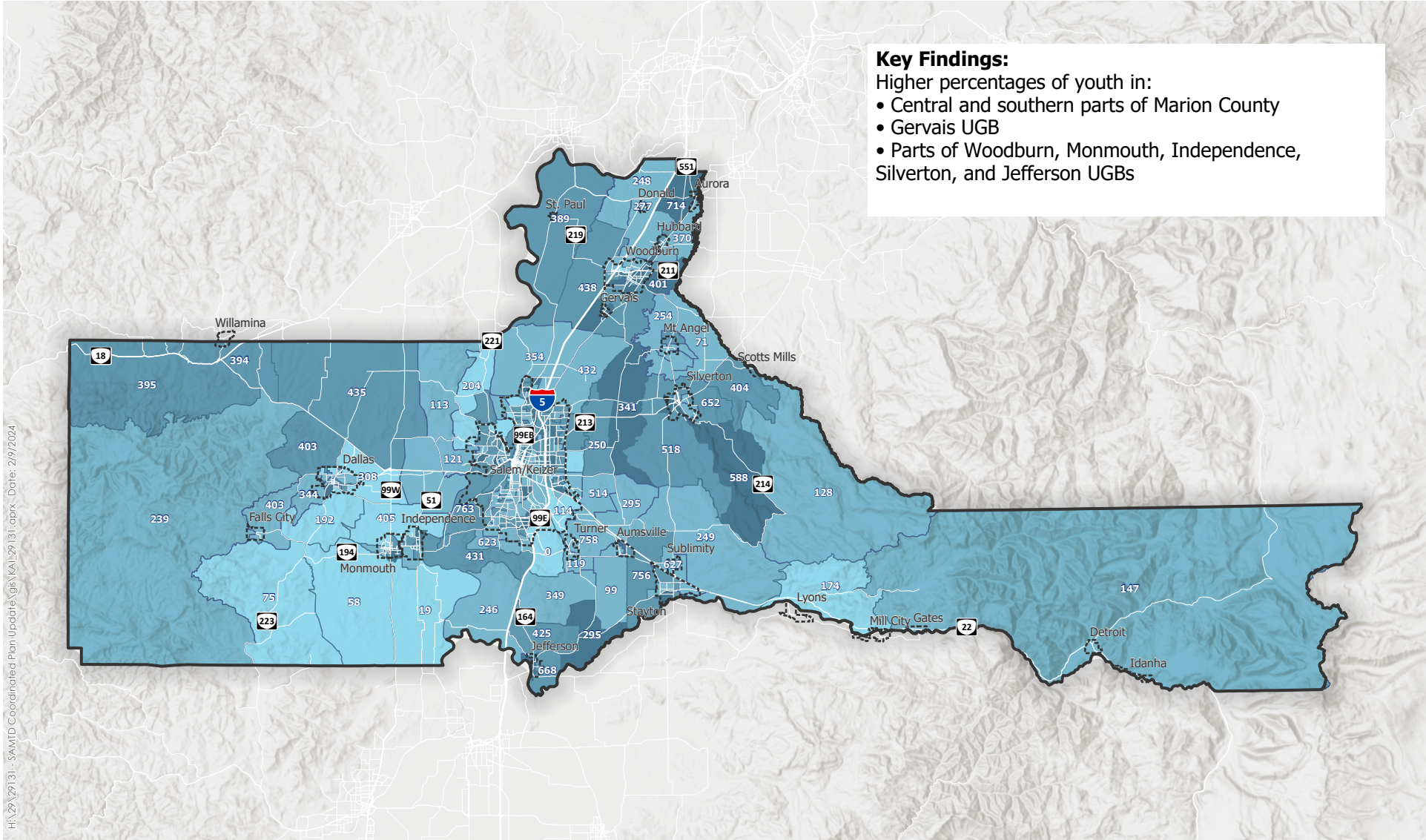
County Boundary  
 UGB



Figure 5

**Senior Population (Age 65 and Older)  
 Marion and Polk Counties, OR**

Values shown in each Block Group indicate total population age 65 and over.



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**Percentage of Youth (Age 17 and Under) by Block Group**

- 0% - 13%
- 14% - 23%
- 24% - 32%
- 33% - 44%

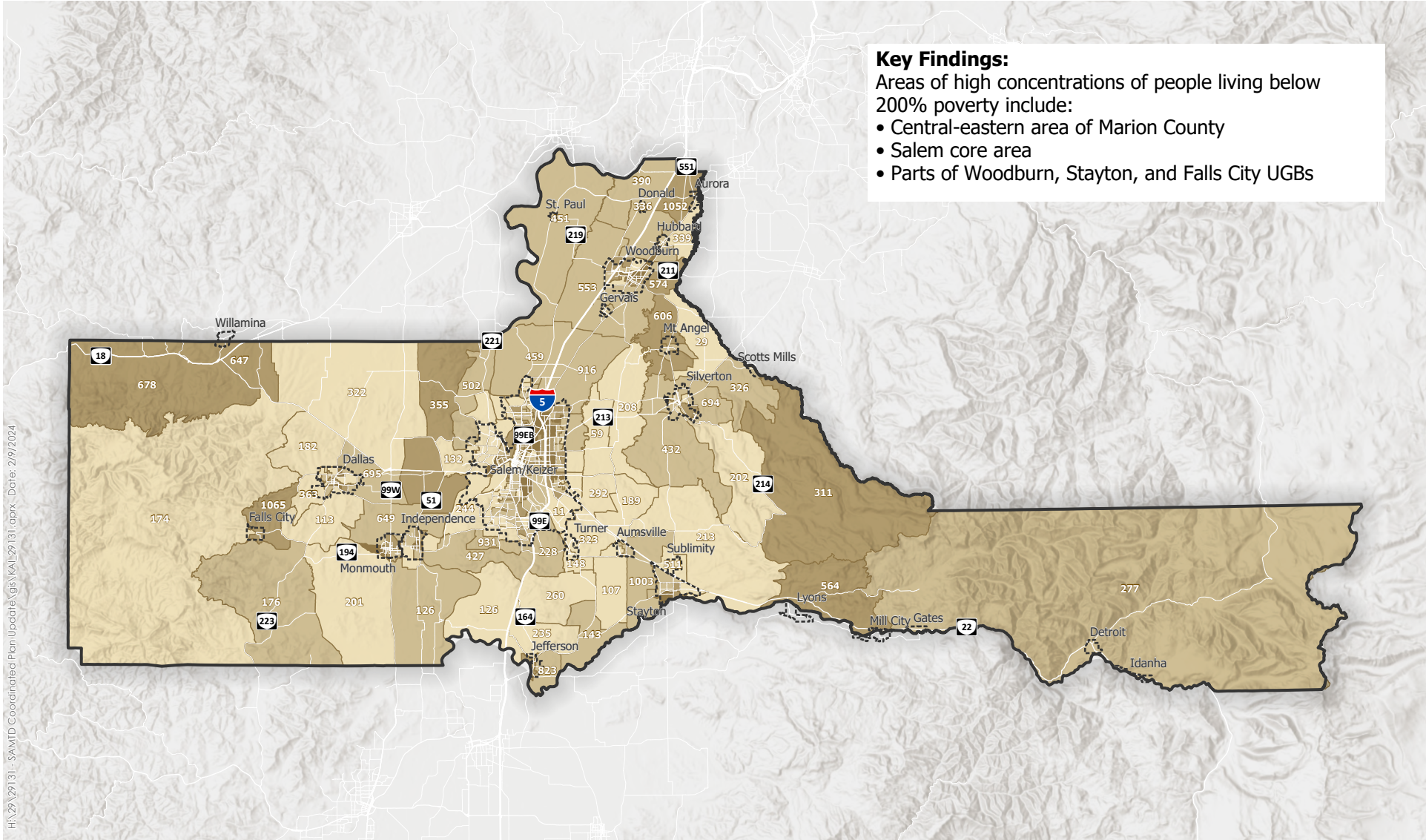
- County Boundary
- UGB



Figure 6

**Youth Population  
 Marion and Polk Counties, OR**

Values shown in each Block Group indicate total population age 17 or under.



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**Percentage of Population Below 200% FPL by Block Group**

- 0% - 21%
- 21% - 37%
- 37% - 55%
- 55% - 78%

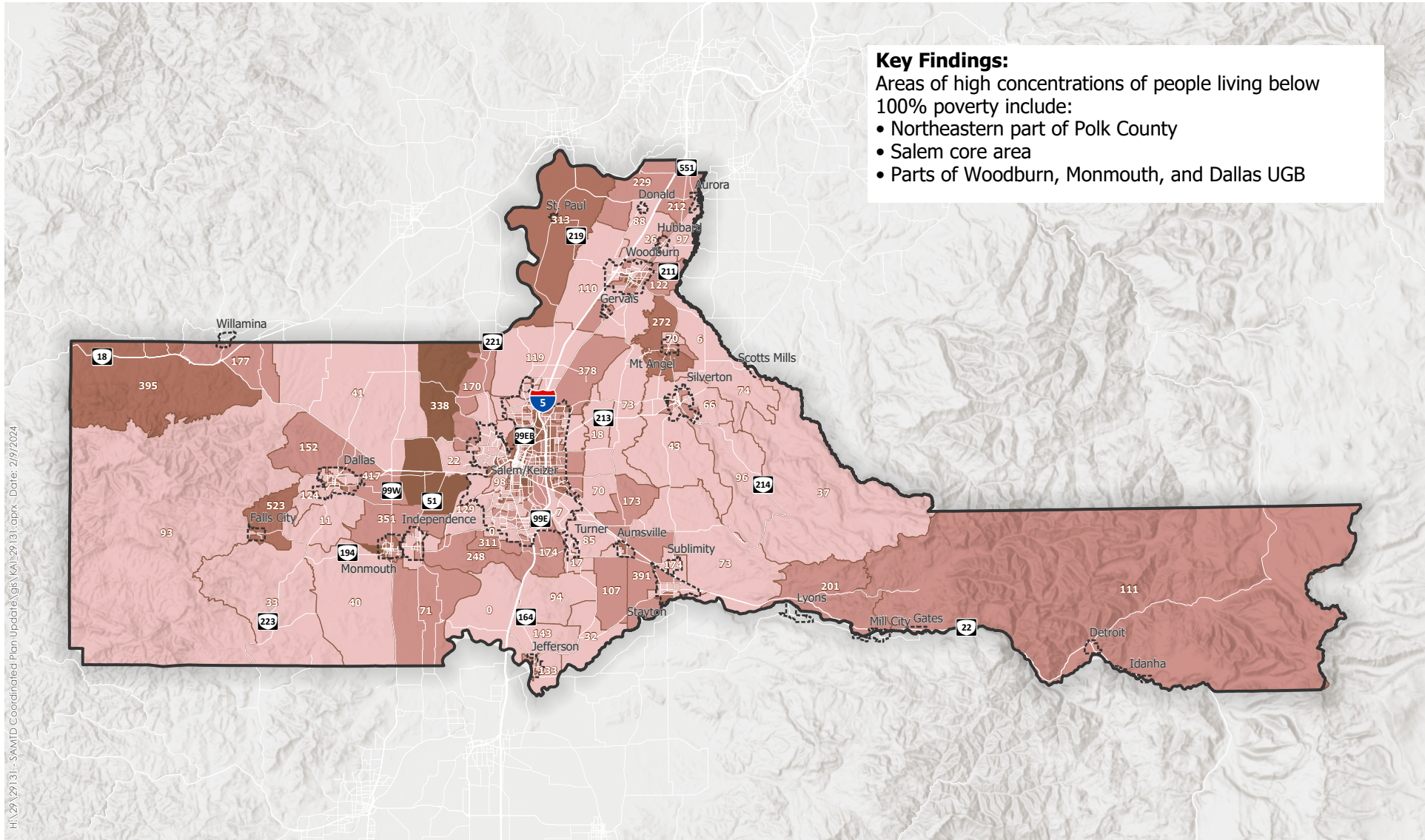
- County Boundary
- UGB



Figure 7

**Population Below 200% Poverty  
 Marion and Polk Counties, OR**

Values shown in each Block Group indicate total population below 200% poverty.



**Key Findings:**  
 Areas of high concentrations of people living below 100% poverty include:

- Northeastern part of Polk County
- Salem core area
- Parts of Woodburn, Monmouth, and Dallas UGB

**Percentage of Population below 100% FPL by Block Group**

- 0% - 9%
- 9% - 20%
- 21% - 35%
- 35% - 63%

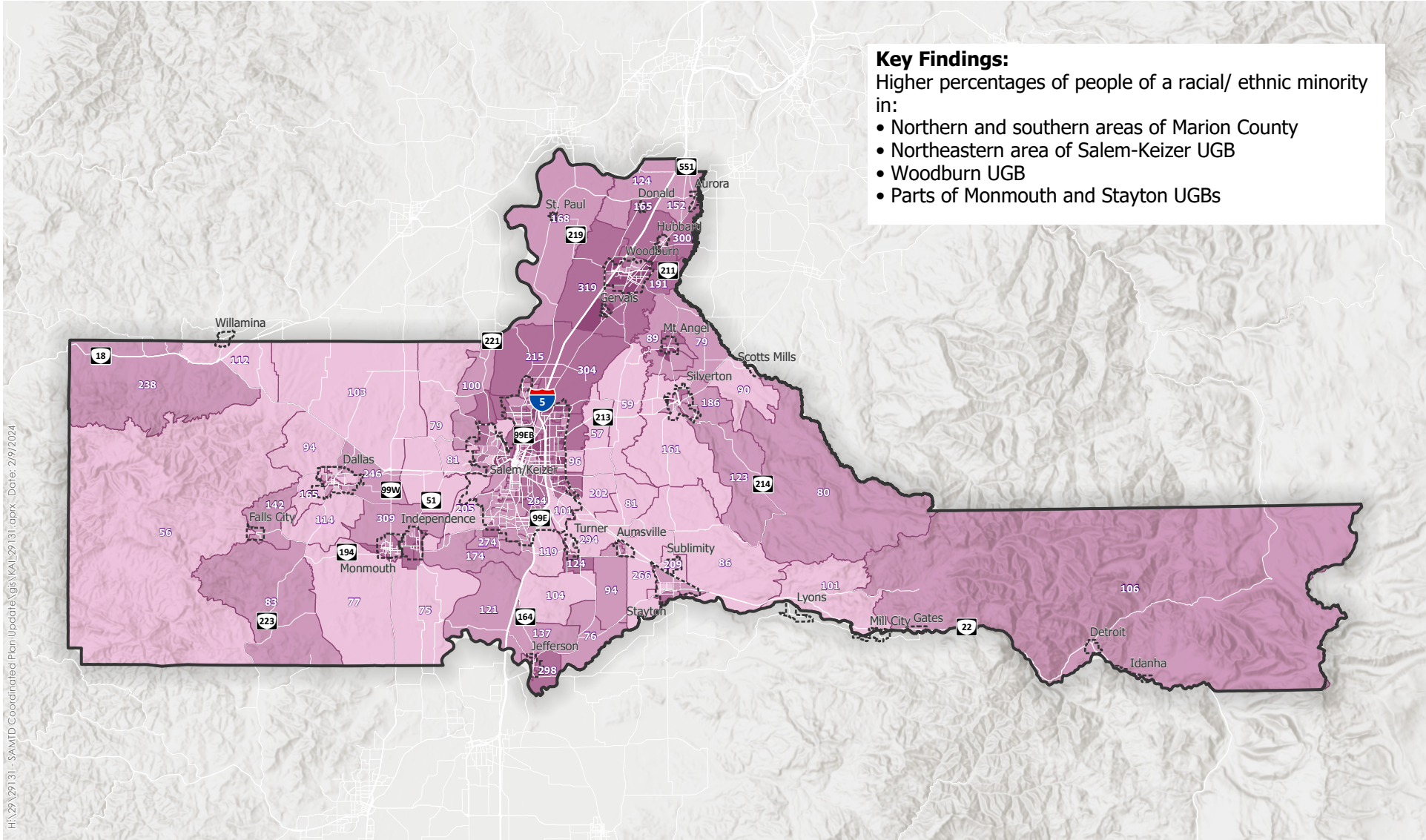
County Boundary  
 UGB

0 | 20 Miles

Figure 8

**Population Below 100% Poverty  
 Marion and Polk Counties, OR**

Values shown in each Block Group indicate total population below 100% poverty.



**Key Findings:**  
 Higher percentages of people of a racial/ ethnic minority in:

- Northern and southern areas of Marion County
- Northeastern area of Salem-Keizer UGB
- Woodburn UGB
- Parts of Monmouth and Stayton UGBs

**Percentage of Population that is Non-White or Hispanic by Block Group**

- 3% - 9%
- 10% - 12%
- 13% - 16%
- 17% - 24%

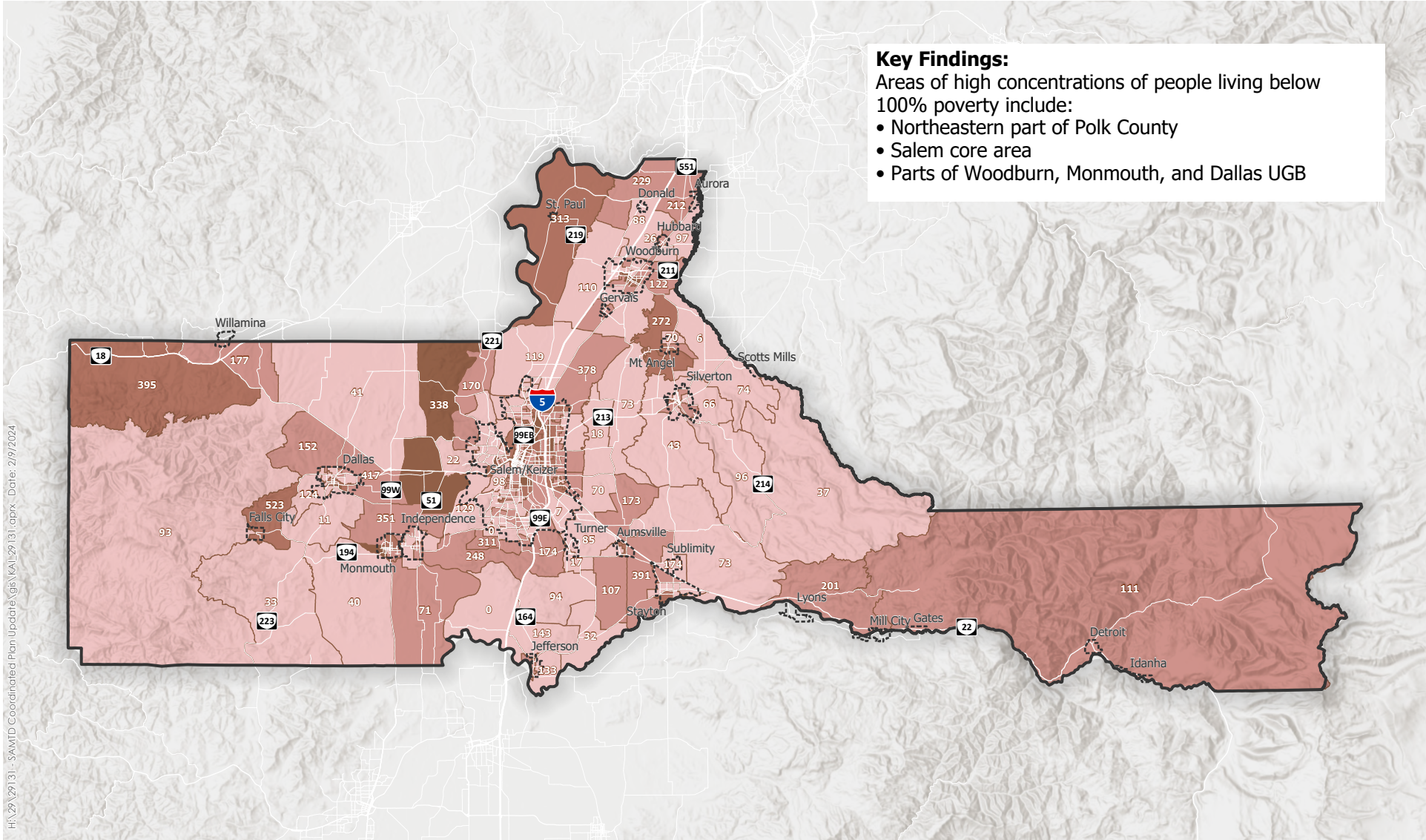
County Boundary  
 UGB

0 | 20 Miles

Figure 9

**Non-White Population  
 Marion and Polk Counties, OR**

Values shown in each Block Group indicate total population that is Non-White.



**Key Findings:**  
 Areas of high concentrations of people living below 100% poverty include:

- Northeastern part of Polk County
- Salem core area
- Parts of Woodburn, Monmouth, and Dallas UGB

**Percentage of Population below 100% FPL by Block Group**

- 0% - 9%
- 9% - 20%
- 21% - 35%
- 35% - 63%

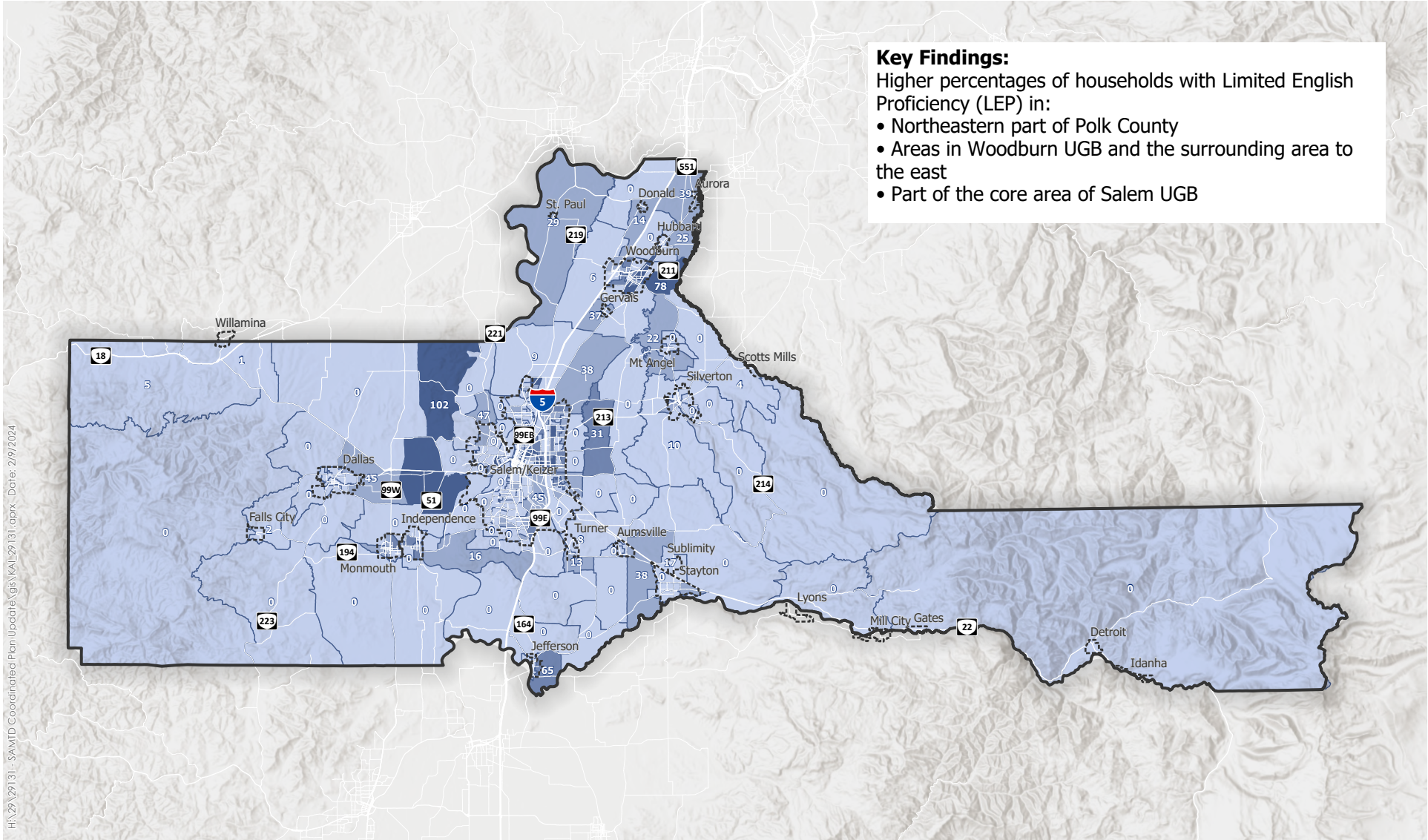
- County Boundary
- UGB



Figure 8

**Population Below 100% Poverty Marion and Polk Counties, OR**

Values shown in each Block Group indicate total population below 100% poverty.



**Key Findings:**  
 Higher percentages of households with Limited English Proficiency (LEP) in:  
 • Northeastern part of Polk County  
 • Areas in Woodburn UGB and the surrounding area to the east  
 • Part of the core area of Salem UGB

**Percentage of Households with Limited English Proficiency (LEP) by Block Group**

- 0% - 2%
- 3% - 7%
- 8% - 19%
- 20% - 54%

County Boundary  
 UGB

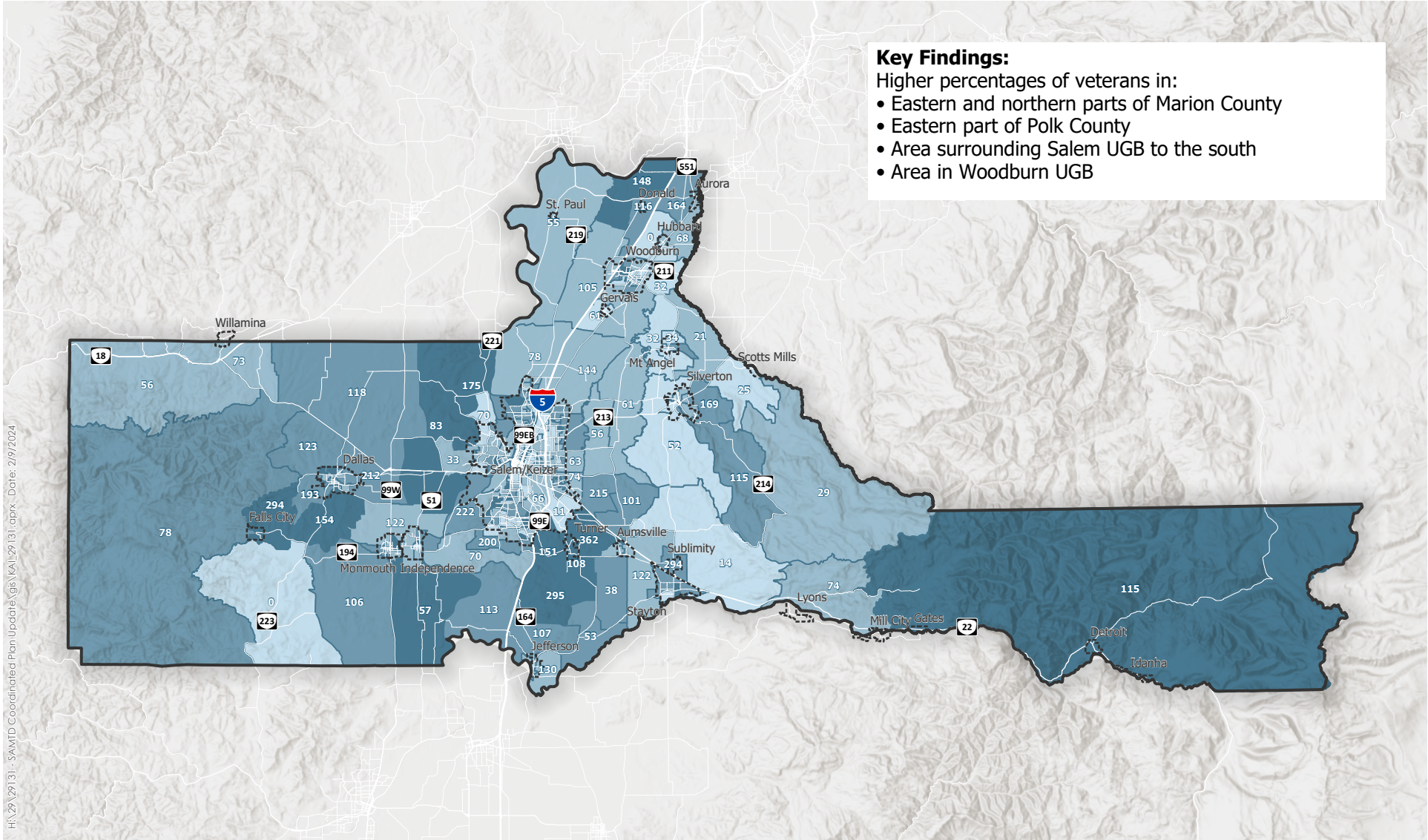
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Figure 11

**Households with Limited English Proficiency (LEP)  
 Marion and Polk Counties, OR**

Values shown in each Block Group indicate total households with Limited English Proficiency (LEP).





**Key Findings:**  
 Higher percentages of veterans in:

- Eastern and northern parts of Marion County
- Eastern part of Polk County
- Area surrounding Salem UGB to the south
- Area in Woodburn UGB

**Percentage of Population with Veteran Status by Block Group**

- 0% - 3%
- 4% - 6%
- 7% - 10%
- 11% - 16%

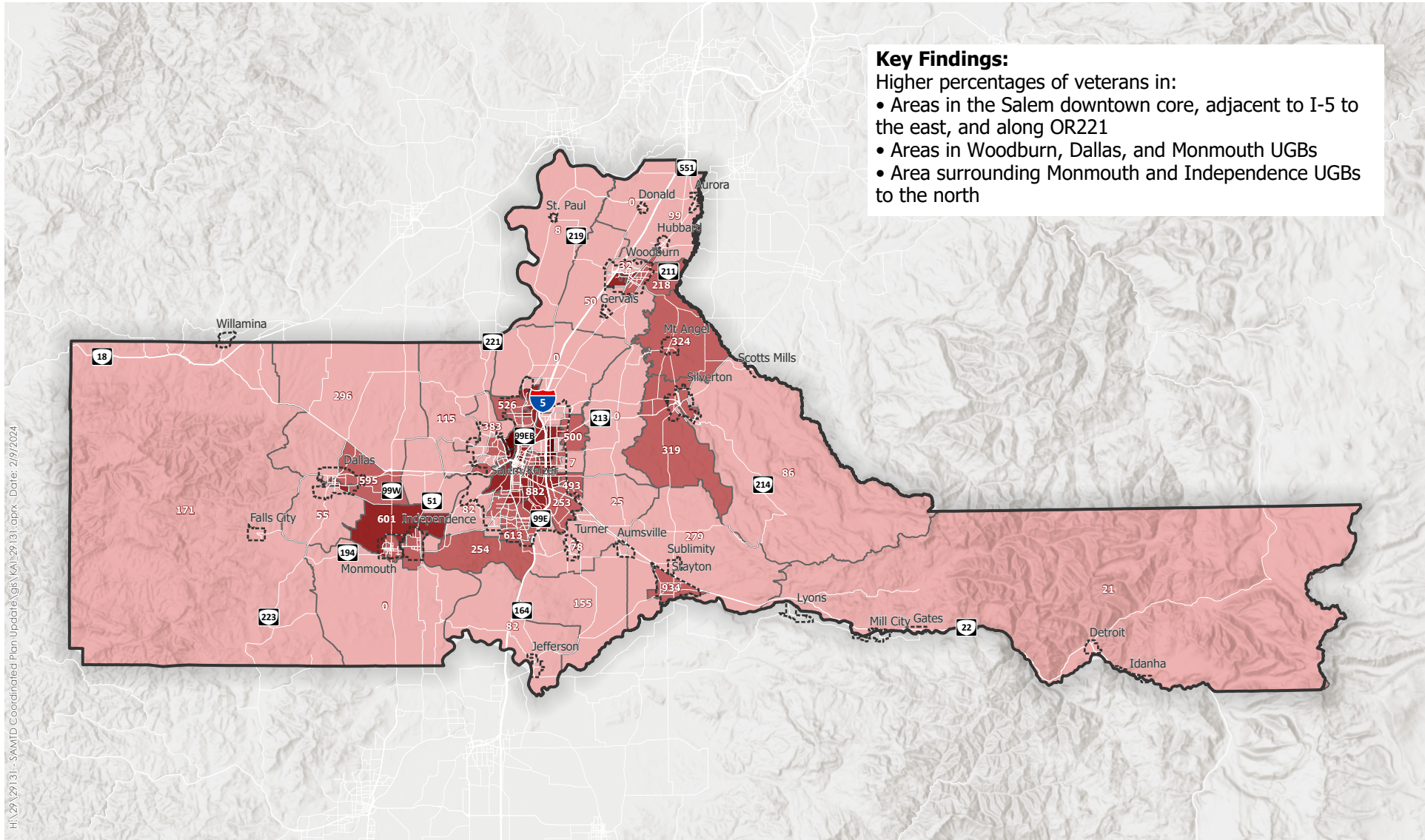
County Boundary  
 UGB

0 20 Miles

Figure 12

**Veteran Population  
 Marion and Polk Counties, OR**

Values shown in each Block Group indicate total population of Veterans.



**Key Findings:**  
 Higher percentages of veterans in:

- Areas in the Salem downtown core, adjacent to I-5 to the east, and along OR221
- Areas in Woodburn, Dallas, and Monmouth UGBs
- Area surrounding Monmouth and Independence UGBs to the north

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**Percentage of Households with 2 or More Units by Tract**

- 0% - 13%
- 14% - 31%
- 32% - 55%
- 56% - 84%

County Boundary  
 UGB

0 20 Miles

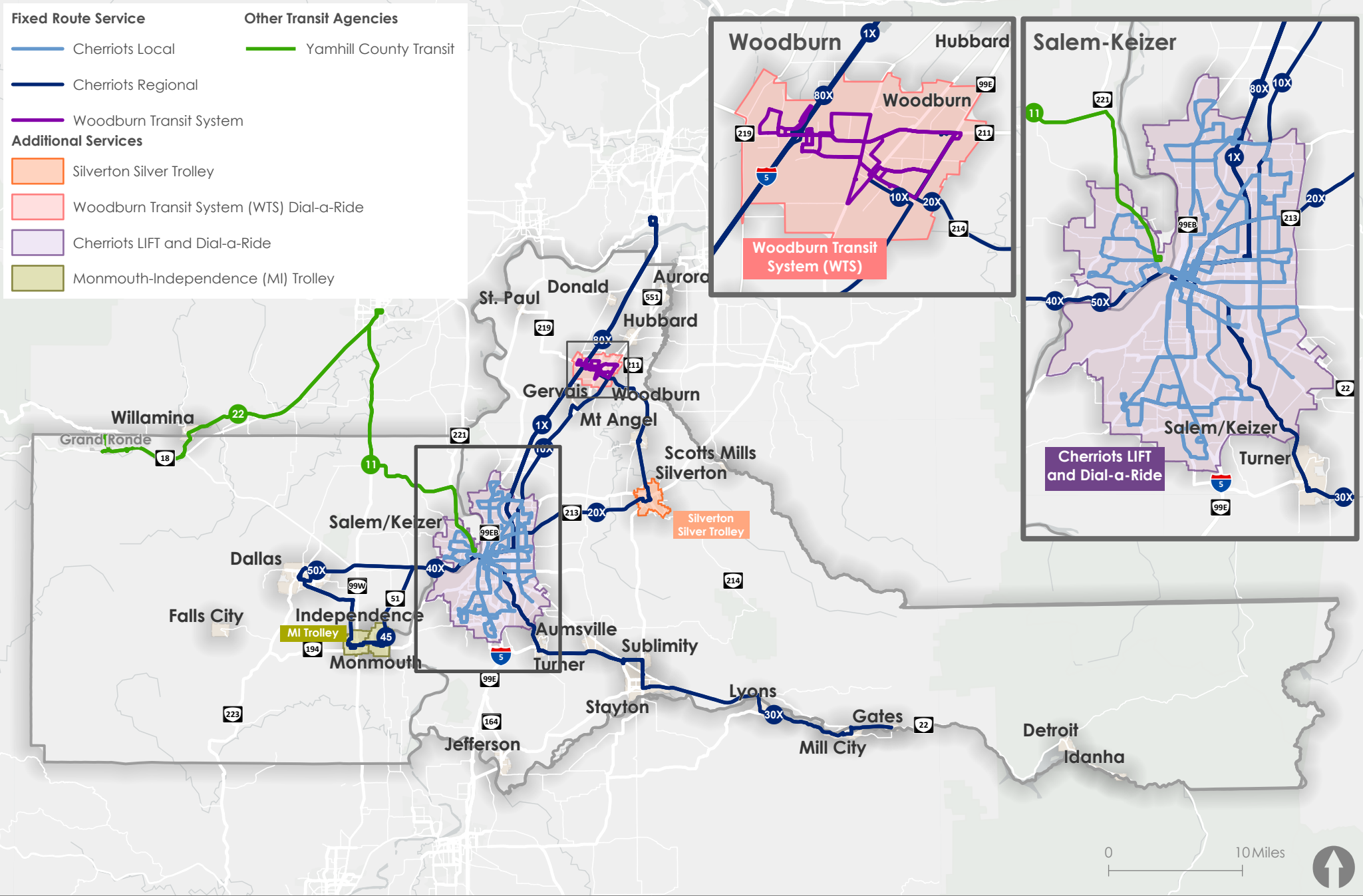
Figure 13


**Multi-Unit Households (2+ Units)  
 Marion and Polk Counties, OR**

Values shown in each Block Group indicate total multi-unit households.

## CHAPTER 3: OVERVIEW OF TRANSIT PROVIDERS IN MARION AND POLK COUNTIES

Figure 14 shows the available transit services in Marion and Polk counties and surrounding areas. Table 2 delineates additional information about the available transit service providers. More information about the providers can be found in Memo #3: Transit Providers in Appendix D.



 County  
 Urban Growth Bounday (UGB)

**Medical Vans (Not Shown)**  
 Salem Health - West Valley Hospital Connections Van  
 Legacy Silverton Medical Center CareVan - Serving medical patients in Marion County who are going to appointments in Silverton, Woodburn, and Keizer

Figure 14  
**Available Transit Service in Marion and Polk Counties**

**Table 2. Available Service Inventory (2022)**

Transit Provider	Service Name	Service Type	Operating Hours	Fares <sup>1</sup>	Service Area
Funded by STIF and § 5310 <sup>2</sup>					
Cherriots	Cherriots Local	Fixed-route service	Monday – Friday (M-F) from approximately 6am-11pm; Saturdays from 7am-9pm; Sundays from 8am-8pm	\$1.60 for One-Ride	Salem-Keizer UGB
	Cherriots Regional	Fixed-route service	Routes run M-F from approximately 6am – 9pm; Weekends from approximately 8:30am – 9pm	\$1.60 for One-Ride	Marion and Polk counties
	Cherriots LIFT	Demand-response paratransit (people with qualifying disabilities)	M – F, 6am – 6pm; Weekends, 8am – 4pm	\$3.20 One-Ride (one way)	Salem-Keizer UGB
	Cherriots Shop and Ride Dial-a-Ride	Demand-Response for seniors (60+) and persons with disabilities	M – F, 6am – 6pm;	\$3.20 One-Ride (one way)	Salem-Keizer UGB
City of Woodburn	Fixed route	Fixed-route service	M – F, 8am – 6pm; Saturdays 9am – 5pm; Sundays 9am – 3pm	-	City of Woodburn
	Fixed route (express)	Fixed-route service	M – F, 8am – 6pm	-	City of Woodburn
	Dial-a-Ride	Demand-response for seniors (60+) and persons with disabilities	M – F, 8am – 6pm; Saturdays 9am – 5pm; Sundays 9am – 3pm	-	City of Woodburn

Coordinated Public Transit - Human Services Transportation Plan for Marion and Polk counties

Transit Provider	Service Name	Service Type	Operating Hours	Fares <sup>1</sup>	Service Area
	Dial-a-Ride (medical appointments)	Demand-response volunteer drivers (medical appointments)	M – F, 7am – 7pm	-	City of Woodburn
West Valley Hospital	Connections Van	Demand-response volunteer drivers (medical appointments)	M – F, 8am – 4pm	-	Polk County
Garten	Garten Services work site van	Demand-response for Garten Community Employment Department	M – F, Weekends depending on planned activities/ job hours	-	Salem-Keizer UGB
Legacy Silverton Medical Center	CareVan	Demand-response volunteer drivers (medical appointments)	(Silverton) Tuesday and Wednesday, 8am – 4pm (Woodburn) Tuesday – Friday, 8am, 5pm	-	Legacy Silverton Medical Center and affiliated clinics
Other Transportation Services (Funded separately from Marion or Polk counties STIF or § 5310 dollars)					
Siletz and Grand Ronde Indian Tribes	Routes 60X and 70X (currently suspended)	Fixed-route service	Daily, 6am – 9 pm (60X); Weekdays, 8am – 7pm (70X)	\$1.50 for one-way	Serves the Salem Downtown Transit Center and connects to Grand Rond and Lincoln City
Canby Area Transit (CAT)	Route 99X	Fixed-route service	M – F, 6am – 8pm; Saturdays 9am to 6pm	M – F, \$1.00; Saturdays are Free	Serves the Bi-Mart in Woodburn and connects to Canby and Oregon City

Coordinated Public Transit - Human Services Transportation Plan for Marion and Polk counties

Transit Provider	Service Name	Service Type	Operating Hours	Fares <sup>1</sup>	Service Area
South Metro Area Regional Transportation (SMART)	Route 1X (partnership with Cherriots)	Fixed-route service	M – F; 5am – 8pm (1X)	\$1.60 for one-way	Wilsonville, Salem, Keizer, and Woodburn
City of Monmouth (operated by Cherriots)	Monmouth-Independence Trolley	Fixed-route service	M – F, 7am – 9pm; Saturdays 8am – 10pm; Sundays 8am – 6pm	-	Serves Main Street in Monmouth and Monmouth Street in Independence
City of Silverton	Silver Trolley	Dial-a-Ride	M – F, 9am - 11:30am and 1:00 - 4:30pm	-	Within City of Silverton city limits
Yamhill County Transit	Route 11	Fixed-route service	M – F; 6am – 7pm	\$1.25 for single one-way fare	Serves the West Salem Transit Center and connects to Amity and McMinnville
Amtrak	Amtrak Cascades	Fixed-route passenger train serving Oregon and Washington	Two Daily Round Trips between Portland and Salem	Varies	Stops at Salem Amtrak Station; Serves Oregon and Washington
	Coast Starlight	Fixed-route passenger train (long distance)	One Daily Trip in Each Direction; Departs to Portland at 2:04pm; Departs to Albany at 3:39pm	Varies	Stops at Salem Amtrak Station; Oregon, Washington, California, and British Columbia
Greyhound	Greyhound	Fixed-route intercity bus	Varies	Varies	Stops at Woodburn Transit Center; serves communities across North America

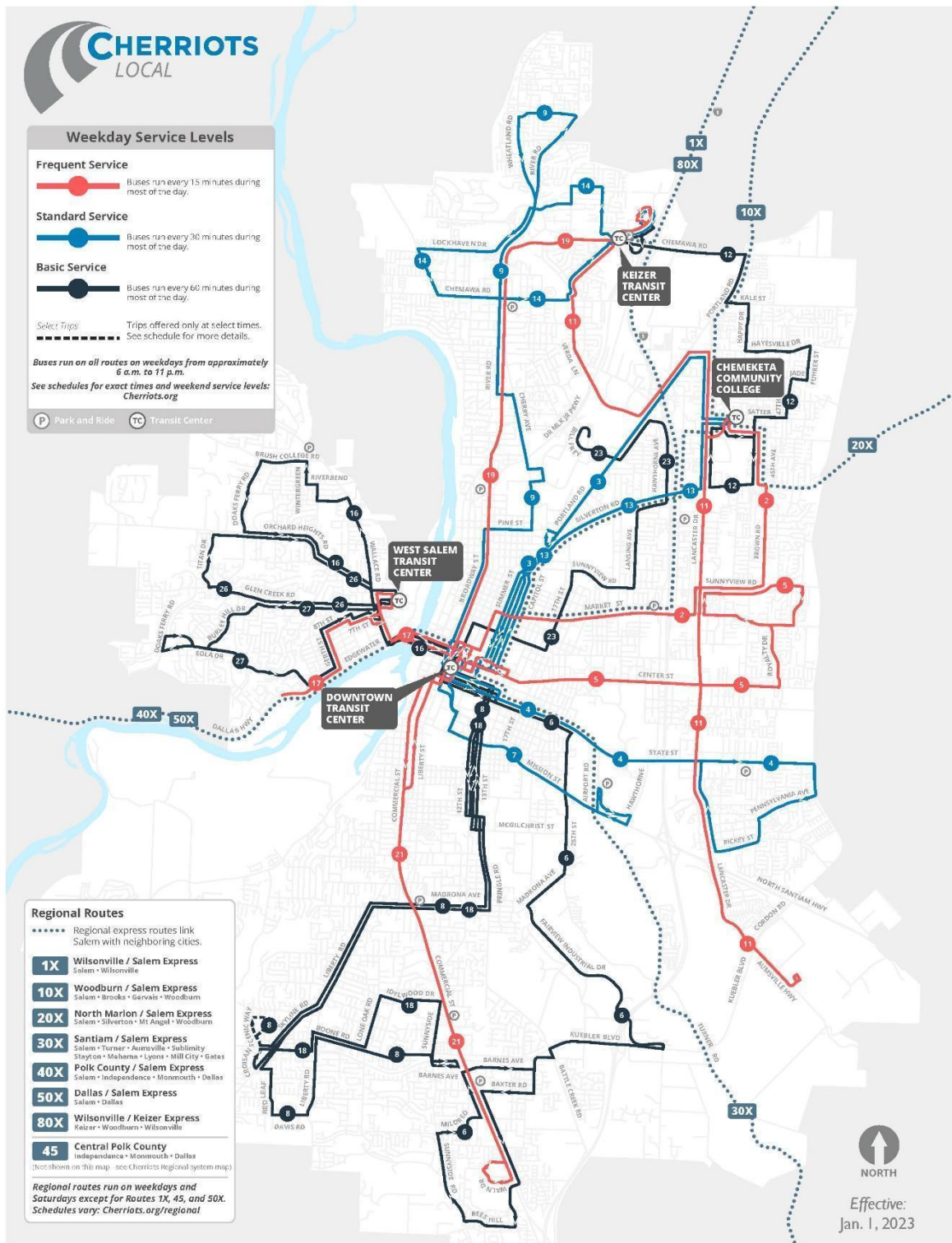
Transit Provider	Service Name	Service Type	Operating Hours	Fares <sup>1</sup>	Service Area
FlixBus	Operated by MTR Western as FlixBus	Fixed-route intercity bus	Varies	Varies	Downtown Salem and two round trips per day to Corvallis, Eugene, and Portland
Cascades POINT	Cascades (Portland-Eugene)	Fixed-route intercity bus	Four trips and one express trip per day in each direction	Adult fares range from \$5 to \$28	Portland to Eugene
Disabled American Veterans Transportation	Veterans Transportation Service (VTA)	Demand-response service for veterans for transportation to veterans hospitals in Portland	Pickups in Salem and Keizer between 7am – 8am; Return to Salem when the last completed appointment is completed or by 3:00pm, whichever comes first	Free	Portland Metro Area, Salem, Keizer, Brooks, Woodburn, Wilsonville, Aurora

<sup>1</sup>Fares shown are for non-discounted trips. Fare discounts or fare passes may reduce a rider’s fare. Other fares are shown in the following section describing providers.

<sup>2</sup>Transit services’ funding sources differ by service and include local property taxes, Section 5311 (rural transportation), federal formula and discretionary grants, and passenger fares.



Figure 15. Cherriots Local Network



## Cherriots Local

Cherriots Local provides fixed-route bus service throughout the Salem-Keizer area, seven days a week. There are 20 Cherriots Local routes operating from 6 a.m. to 11 p.m. on weekdays, 7 am. to 9 p.m. on Saturdays, and 8 a.m. to 8 p.m. on Sundays. Cherriots Local weekday service ranges from every 15 minutes for Frequent Service routes, every 30 minutes for Standard Service routes, and 60 minutes for Basic Service routes. The Cherriots Local fleet includes 64 buses that can seat up to 38 riders with standing room for an additional 20 riders. 53 buses are required for weekday peak operations. Figure 15 above shows a map of the Cherriots Local network.

The current passes and fare options as of August 1, 2023, are summarized in Table 3 below.

**Table 3. Cherriots Local and Cherriots Regional Fares**

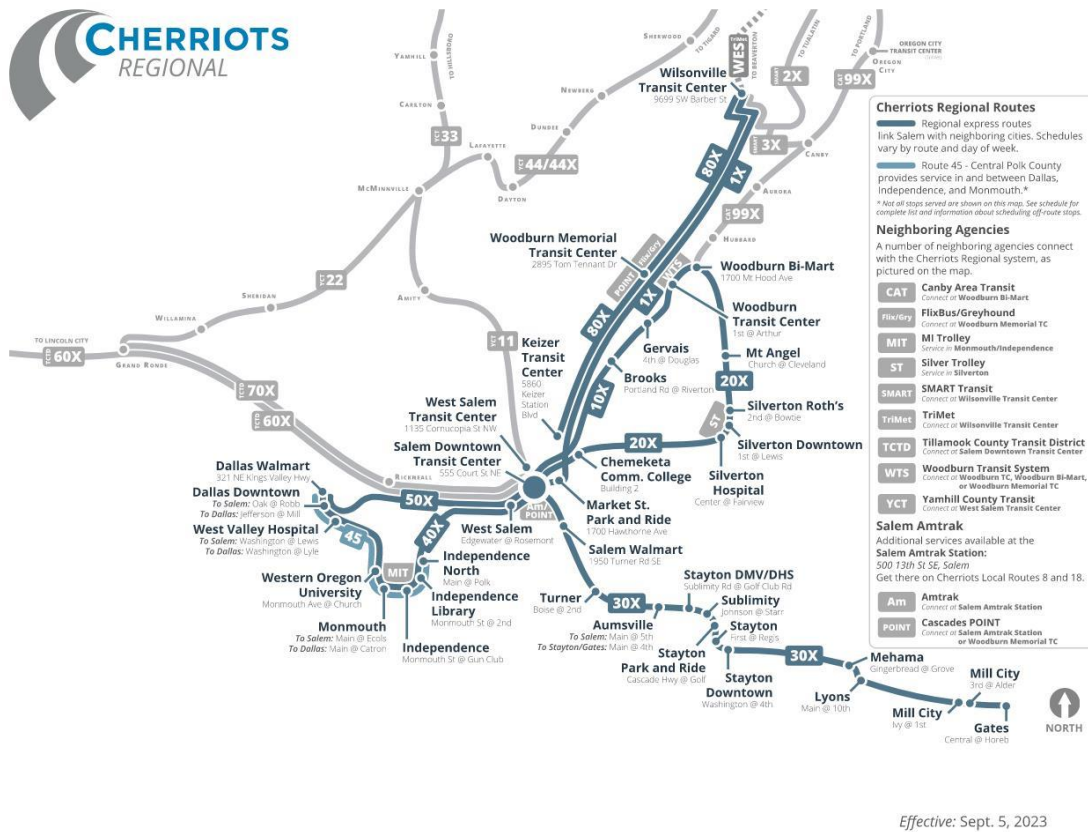
Fare Type	Fare	Reduced Fare
One-ride	\$1.60	\$0.80
Day pass	\$3.25	\$1.50
Month pass and 30-day pass	\$45.00	\$22.50
Annual pass	\$540.00	\$270.00
Universal LIFT Month Pass	\$90.00	
Youth (0-18)	Free	Free

Every Cherriots Local and Cherriots Regional bus is equipped with a boarding ramp or power lift to ensure ADA compliance and serve riders using a mobility device. Each bus includes a designated securement area that can fit up to two mobility devices.

## Cherriots Regional

Cherriots Regional routes provide weekday and Saturday services throughout Marion and Polk counties. The Regional routes include express routes, all connecting to the Salem Downtown Transit Center. Route 45 (Central Polk County) provides a deviated fixed-route service in and between Dallas, Independence, and Monmouth. Neighboring agencies connect with Cherriots Regional buses to provide additional service within Marion and Polk counties as well as connections to surrounding areas. These agencies include Canby Area Transit, FlixBus/ Greyhound, MI Trolley, Silver Trolley, SMART, TriMet, Woodburn Transit System, Yamhill County Transit, Amtrak, and Cascades POINT. The Cherriots Regional fleet includes 19 buses, 11 of which are required for weekday service operations. Figure 16 shows a map of the Cherriots Regional network.

Figure 16. Cherriots Regional Network



## Cherriots LIFT

Cherriots LIFT is a shared-use paratransit service that offers origin-to-destination transportation to eligible individuals whose qualifying disabilities prevent them from using the Cherriots Local bus services. The service area for Cherriots LIFT is all areas within the Salem-Keizer UGB. Eligible participants can schedule a ride with Cherriots LIFT Monday through Friday, 5:30 a.m. to 9 p.m., Saturdays from 6 a.m. to 9 p.m., and Sundays from 8 a.m. to 8 p.m. The Cherriots LIFT fleet includes 43 buses. The cost is \$3.20 for a one-ride trip.

## Cherriots Shop and Ride (Shopper Shuttle and Dial-a-Ride)

Cherriots Shop and Ride includes a dial-a-ride service and shopper shuttle for seniors aged 60 and over, and individuals with disabilities. Applications are not required. The dial-a-ride service picks up individuals at their homes and can take them to any location within the Salem-Keizer UGB. Eligible participants can schedule a ride Monday through Friday starting at 8 a.m. with final drop-offs by 5 p.m.

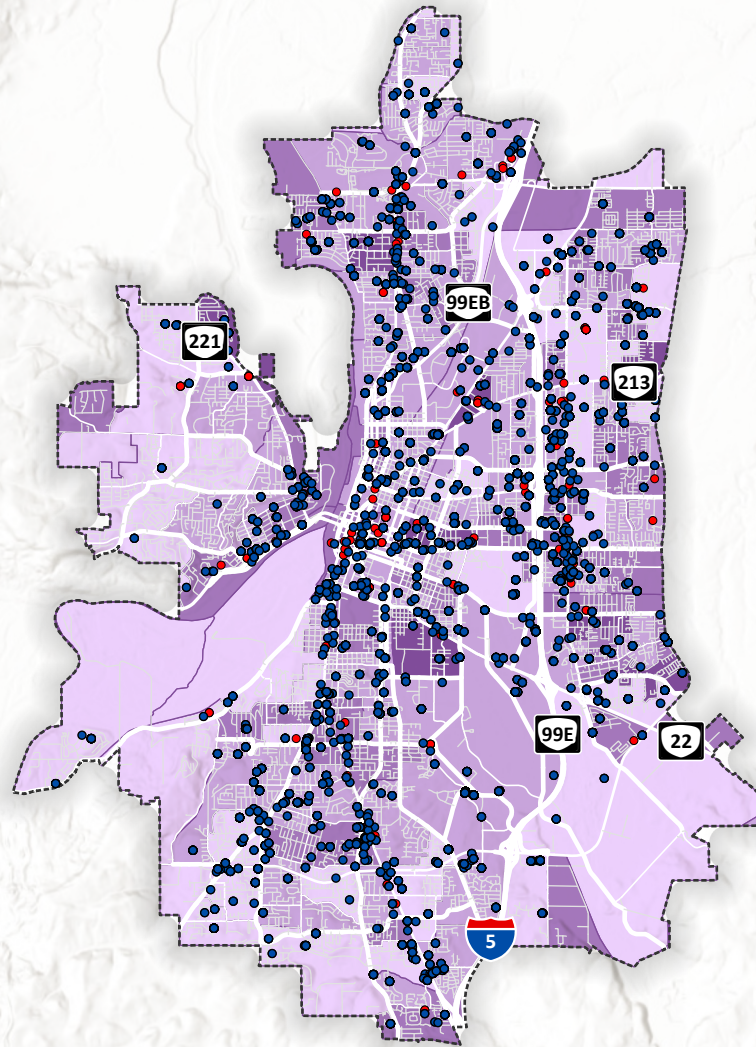
Origins and destinations for Cherriots LIFT service from May 1 to May 31, 2023, are shown with population density of individuals with disabilities in Figure 17 and senior population in Figure 18. Most of the origins and destinations overlap, indicating two-way trips. Within the May 2023 period, there were 6,946 Cherriots LIFT trips. There are several areas with high concentrations of Cherriots LIFT origins and destinations, including:

- Lancaster Drive between State Street and Silverton Road
- River Road between Sam Orcutt Way and Lockhaven Drive
- South Commercial Street between Fairway Avenue and downtown Salem
- Center Street between 23rd Street and Downtown Salem
- Downtown core area





These areas include clusters of medical service centers, grocery stores, or other commercial buildings with food and shopping services and generally have lower population densities of people with disabilities and/or seniors because they are more commercial in nature.




There are several block groups in the Salem-Keizer UGB with high population densities of people that meet LIFT eligibility relative to Marion and Polk county demographic data. While the percentage of the population meeting that demographic may be high in these areas, the total number of people meeting Cherriots LIFT eligibility may be low because the area is more industrial or rural in nature. In general, residential areas with the highest population densities of people eligible for Cherriots LIFT are also areas with clusters of origin and destination data.

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**Percentage of Population with a Disability by Block Group**

-  1% - 10%
-  11% - 16%
-  17% - 24%
-  25% - 40%

-  Origins
-  Destinations
-  Salem/ Keizer UGB

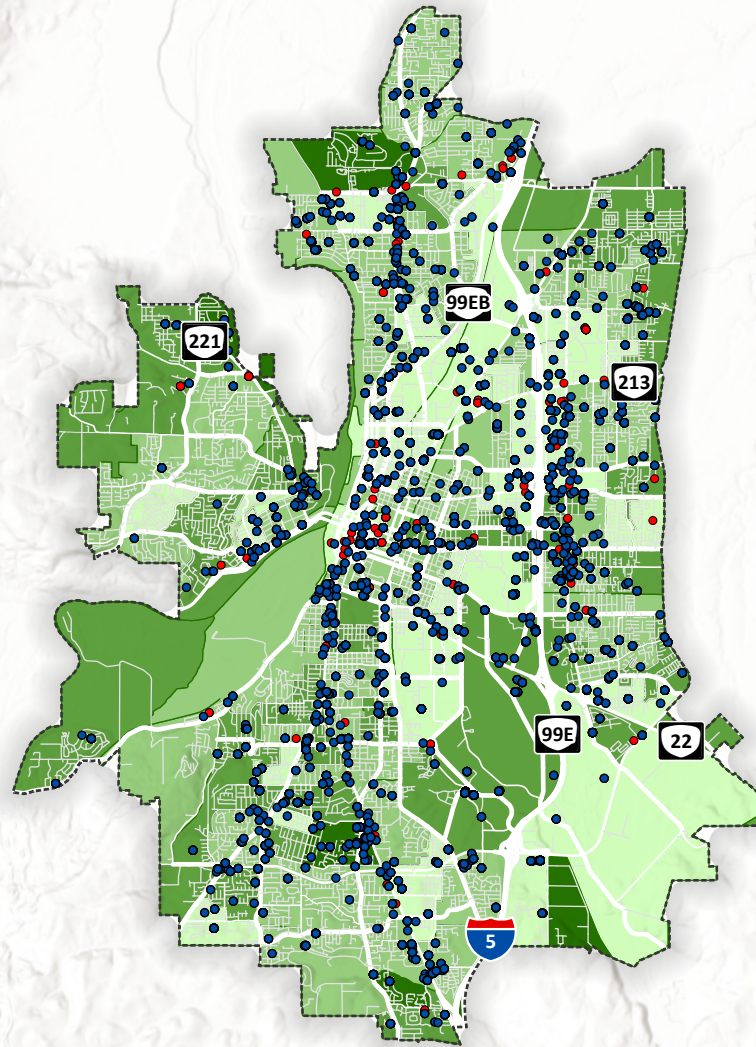
0 4.5 Miles



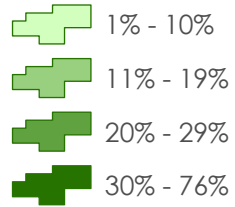
Figure 17

**Origins and Destinations for Cherriot's LIFT Customers and Population with Disabilities Salem/ Keizer, OR**

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**Percentage of Population Age 65 and Over by Block Group**



- Origins
- Destinations
- ▭ Salem/ Keizer UGB



Figure 18

**Origins and Destinations for Cherriots LIFT Customers and Senior Population (Age 65 and Older) Salem/ Keizer, OR**

# Woodburn Transit System

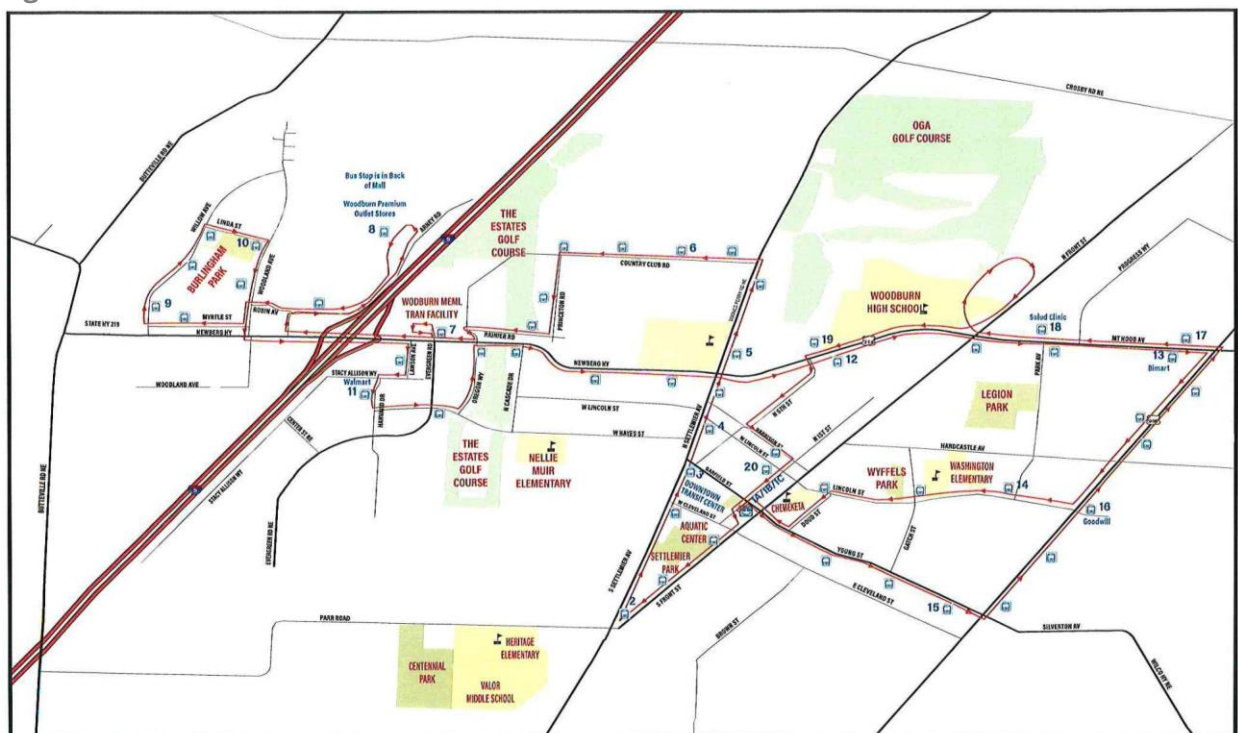
Woodburn Transit System (WTS) is the primary public transportation provider serving the City of Woodburn. WTS operates two fixed-routes services, referred to as the Fixed Route and the Express Route, a dial-a-ride service, and an out-of-town medical transportation program. All buses and dial-a-ride vehicles are ADA accessible. Neighboring agencies, including Cherriots, CAT, and Cascades POINT, provide regional connections from Woodburn to surrounding areas. All WTS services are currently free.

Both the Fixed Route and Express Routes operate Monday through Friday, 8 a.m. to 6 p.m. The Fixed Route also operates on Saturdays from 9 a.m. to 5 p.m., and Sundays from 9 a.m. to 3 p.m. A fleet of 12 ODOT-owned buses are used on the Fixed and Express routes. A map of the Fixed Route is provided in Figure 19 and the Express Route in Figure 20.

The WTS dial-a-ride provides paratransit services for seniors and people with disabilities within the City of Woodburn. The service operates Monday through Friday from 8 a.m. to 6 p.m., Saturdays from 9 a.m. to 5 p.m., and Sundays from 9 a.m. to 3 p.m.

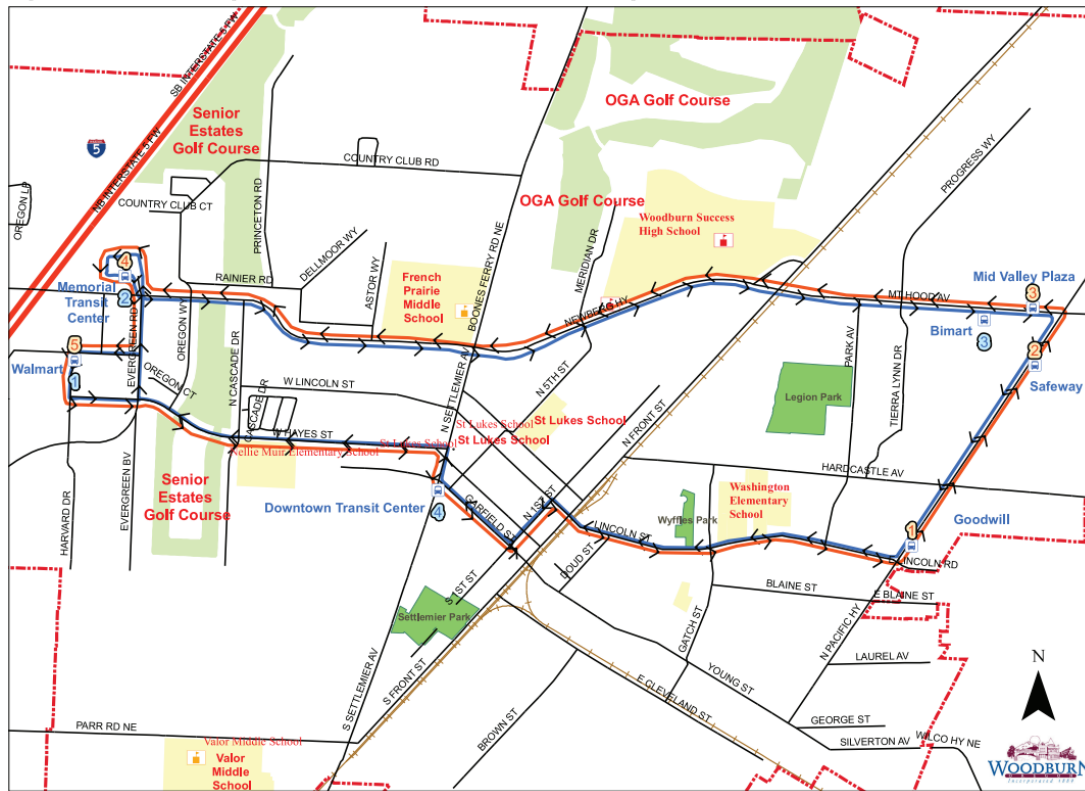
The City of Woodburn has restored the Out-of-Town Medical Transportation Program, which was paused during the COVID-19 pandemic due to volunteer availability. There are currently two paid staff that provide medical transportation to all areas between Portland and Salem, but due to high demand (10 to 15 calls per day), they have to turn down many of their calls.

Figure 19. WTS Fixed Route



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Figure 20. WTS Express Route (bi-directional loop)



## City of Silverton Silver Trolley

The Silver Trolley is a dial-a-ride service providing transportation to youth, seniors, and the general public within the Silverton UGB. The Silver Trolley primarily provides transportation to non-emergency medical appointments, local shopping and dining, and other personal trips within the service area. Operating hours are Monday through Friday from 9 to 11:30 a.m. and 1 to 4:30 p.m. Services are free but donations are accepted.

## Monmouth-Independence Trolley

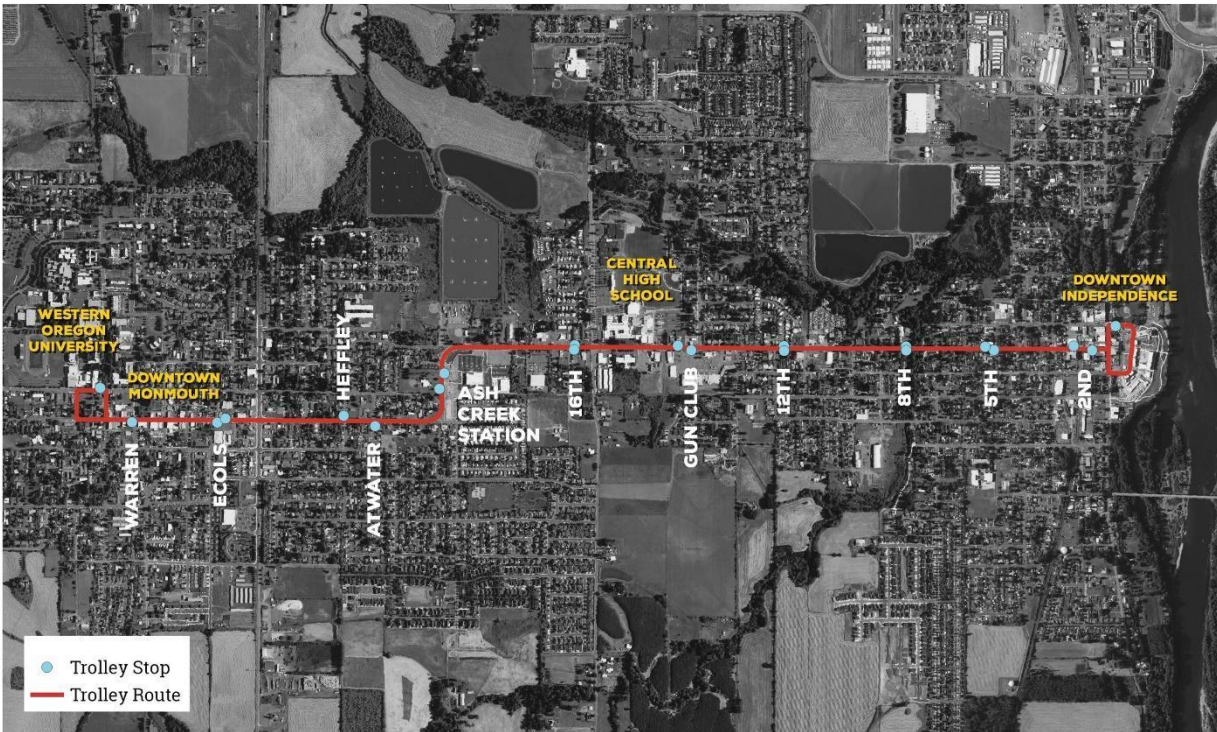
In 2022, state legislators provided American Rescue Plan (ARPA) grant funds through the state budget to the cities of Monmouth and Independence to implement a free fixed-route trolley pilot service connecting downtown Independence, downtown Monmouth, and the Western Oregon University (WOU) campus. The Trolley operates Monday through Friday from 7 a.m. to 9 p.m., Saturday from 8 a.m. to 10 p.m., and Sundays/holidays from 8 a.m. to 6 p.m. The service operates two trolleys at a time, each seating 14 passengers plus one wheelchair passenger. Each vehicle is equipped with a fold-out ramp to serve riders with mobility devices and ensure ADA compliance. The Trolley operates as a deviated fixed-route service with the ability to pick up or drop off



passengers up to three-quarters of a mile from the regular route path. Reservations for deviations must be made at least 24 hours in advance by calling the Cherriots call center.

The pilot will operate for two years to determine long-term viability and is currently managed and operated by Cherriots. Within the first three months of operations, the trolley served more than 35,000 riders. The MI Trolley route is shown in Figure 21.

**Figure 21. MI Trolley Route (Map provided by MI Trolley)**



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## Salem Health (West Valley Hospital)

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Salem Health operates the West Valley Hospital Connections Van that provides dial-a-ride services for medical appointments within Polk County. Anyone in Polk County can use the service to go to any medical, dental, or vision provider within Polk County. Common locations include West Valley Hospital and Salem Health Medical Clinics at Uglow and Miller avenues in Dallas. The Connections Van is operated primarily by volunteers. The service is free and available Monday through Friday from 8 a.m. to 4 p.m. The van is wheelchair accessible.

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## Garten Services Work Site Van

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Garten Services is a non-profit organization in the Salem area that provides employment, social day activity, and retirement services for people with developmental disabilities and long-term mental illness. Garten provides a work site van that offers transportation for Garten employees to and from Kittelson & Associates, Inc.

job sites, interviews, and small group activities within the Salem-Keizer UGB. Operations are primarily on weekdays, with some weekend services for employee transportation to weekend job sites. The work vans are ADA accessible. The service is free for Garten employees.

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## Legacy Silverton Medical Center CareVan

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The Legacy Silverton Medical Center provides complimentary rides to and from medical appointments at Legacy Silverton Medical Center and its affiliated clinics, providers, services, and programs. There are two CareVan services, one in Silverton and one in Woodburn. The Silverton CareVan operates Tuesday and Wednesday from 8 a.m. to 4 p.m. The Woodburn CareVan serves both Woodburn and Silverton and operates Tuesday through Friday from 8 a.m. to 5 p.m.

Both services are operated primarily by volunteers and the vehicles are ADA accessible. The CareVan is a curb-to-curb service and can transport people from their households to medical providers affiliated with Legacy Silverton Medical Center.

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## Other Transportation Services

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Other transportation services in Marion and Polk counties include:

### **Siletz and Grand Ronde Indian Tribes**

The Siletz and Grand Ronde Indian Tribes were funding a fixed route service connecting Lincoln City, Grand Ronde, and Salem. There were stops in Salem, including one in West Salem, the Salem Downtown Transit Center, and the Salem Amtrak Station. The routes were suspended in December 2023 when the former operator, Tillamook County Transportation District (TCTD), terminated the service due to a lack of available bus operators. The tribes are currently working to restore the service.

### **Canby Area Transit (CAT)**

Route 99X is a fixed-route service on the Highway 99E corridor connecting the Oregon City Transit Center, Canby Transit Center, and the Woodburn Bi-Mart. The route operates Monday through Saturday. The route offers connections to TriMet and the Clackamas County Connects Shuttles at the Oregon City Transit Center. At the Canby Transit Center, transfers can be made to SMART (Wilsonville) and South Clackamas Transportation District (SCTD). Connections to Cherriots Regional and the Woodburn Transportation Service (WTS) can be made at the Woodburn Bi-Mart parking lot.

## **South Metro Area Regional Transportation (SMART)**

Cherriots and SMART partner to provide Route 1X commuter express transportation service between Wilsonville and Salem. It travels between Wilsonville Transit Center and the Salem Downtown Transit Center with stops at the State Capitol Mall. It currently operates on weekdays only.

## **Yamhill County Transit**

Yamhill County Transit's Route 11 provides weekday fixed-route service between McMinnville Transit Center and the West Salem Transit Center. The route operates on weekdays only and connects McMinnville, Amity, and Salem.

## **Amtrak**

Amtrak Cascades and Coast Starlight routes include stops at the Salem Train Station. Amtrak Cascades operates in the Pacific Northwest between Eugene, OR, and Vancouver, B.C., including two daily round trips between Portland and Salem. The Coast Starlight provides long-distance service between Los Angeles and Seattle, with one daily stop in each direction at the Salem Amtrak Station.

## **Greyhound**

Greyhound operates intercity bus services across North America. In Marion and Polk counties, Greyhound buses stop at the Memorial Park and Ride off I-5 in Woodburn. Salem is not currently served by Greyhound.

## **FlixBus**

FlixBus operates intercity bus services across North America and offers two round trips a day from a stop near the Salem Downtown Transit Center to Corvallis, Eugene, and Portland.

## **Cascades POINT**

POINT is an intercity bus service operated by the Oregon Department of Transportation (ODOT) and stops at the Amtrak Station in Salem. The POINT network connects major transit centers across Oregon. Salem is on the Cascades route, which operates between Eugene and Portland.

## **Disabled American Veterans Transportation**

The Veterans Transportation Service (VTS) provides transport for veterans to the VA Medical Center in Portland. The service is free and only available to veterans.

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## CHAPTER 4. PUBLIC OUTREACH

This section describes the various stakeholder involvement opportunities that helped to inform this plan.

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### Provider Input

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The project team conducted interviews with health and human service providers and transportation providers in Marion and Polk counties, including the City of Woodburn, City of Independence, Polk County Family and Community Outreach Department, and Salem Health. The objective of the interviews was to learn more about the transit needs, gaps, and opportunities for seniors and people with disabilities. Key takeaways from provider calls are summarized below.

- Increased transit service to rural communities in Marion and Polk counties is desired, especially to provide transit options for residents to access essential medical or other life services.
- Support or enhancement of volunteer driver programs to ensure consistency and reliability of the service.
- Outreach, marketing, and education about transit and transit training programs are desired. Route finding using Cherriots website is challenging with the existing platform. Transit training program needs to be enhanced for people with disabilities.
- Additional coordination for first-and-last-mile travel is needed. Traveling to and from transit stops on pedestrian facilities can be difficult or even completely inaccessible for people with physical disabilities, vision or impairments, or mobility device users.
- Safer and more comfortable transit stops are desired.
- Funding is an ongoing challenge.
- Additional coordination between transit programs, including medical service vans, would encourage more efficient sharing of information amongst providers.

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### Public Outreach Takeaways

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From September to November 2023, the project team engaged with about 150 community members through five in-person events and one online event. An online survey had 163 people participate, with over 100 answering all questions. The goal of these engagement events was to discuss transportation needs of seniors and people with disabilities in Marion and Polk counties.

#### Involvement Event Takeaways

Several key themes emerged from the public involvement events, including:

- **On-demand services** are highly valued and desired in all the communities that participated in the outreach. The most urgent need is for transport to medical services, but access to basic services such as groceries, local appointments, and visiting family was also highly desired.
- **Fixed-route services** are important as well:
  - More frequency will help people to visit nearby larger cities such as Salem and Portland.
  - More connections between Monmouth-Independence and Dallas.
  - Education and marketing about what services are available and how to use them is very helpful – for example, people did not realize travel training is currently available for free through Cherriots.
- **Local circulators** in Silverton and Monmouth-Independence are much appreciated:
  - Participants requested that services are more flexible to facilitate pickup and drop-off. Getting to and from fixed-route transit stops is a significant barrier for many seniors and people with disabilities. The project team talked about how the current Monmouth-Independence (MI) Trolley “deviates” on request.
  - Expanding transit service times (hours per day) and days (especially in Silverton) would be a great asset to the community.
  - Local circulator services such as the MI Trolley build enthusiasm for transit and community support for service expansion.
- **Active outreach and sharing information** in a format that people can understand will increase ridership:
  - A significant percentage of seniors do not use a computer, and a lesser percent don't have access to a smartphone. This demographic is often the most in need of services, and the most in need of on-demand services.
  - Senior Centers provide an essential social network for many seniors and a collaboration opportunity for transit providers. Currently, lack of funding for transit providers makes it difficult for staff to help people meet their transportation needs.
  - Social connections are a key determinant of health for seniors. Creating more transit education opportunities framed as social events and outings will improve both ridership and health.

Participants responded to two open-ended questions, the questions and response themes included:

- What do you appreciate and value about transit services?
  - Friendly drivers
  - Timely and frequent service
  - Affordability
  - Safety
- What are your challenges with transit services?
  - Long wait times for connections
  - Late arrival and departure of Cherriots LIFT services
  - Inaccessible routes for people to get to/from bus stops and lack of accessible stops for wheelchairs

- Lack of: bus routes and access to rural areas, weekend and evening Cherrits Regional service, and frequency
- Inadequate shelters and lack of seats at bus stops
- Lack of access to medical appointments. Because it is difficult to access care, illness is not treated until it is too late

## Survey Results

The project developed and shared an online and paper survey from September 26 through November 23, 2023, provided in English and Spanish. Key findings from the survey are below.

### Desired Improvements:

- The top desired improvements for existing riders included (1) bus routes that take them closer to where they want to go, (2) buses operating on Saturdays, and (3), more amenities at bus stops. Participants could select as many options as they wanted, and there was strong interest in all improvement types.
- The top desired improvements for non-riders included (1) improved service frequency, (2) bus routes that take them closer to where they want to go, and (3) bus service/stops closer to their home.
- Open ended responses indicated interest in grocery access, specific neighborhoods within Salem-Keizer, and connections to rural and regional destinations.

### Existing Rider Use

- Besides taking the bus, respondents indicated walking as their second-most used mode for traveling followed by driving themselves.
- Riders typically feel somewhat or very familiar with transportation services, more so than non-riders.
- Most respondents used Cherrits services, followed by the Monmouth-Independence Trolley and medical services. Fewer respondents were from Woodburn, Silverton, and neighboring counties which may influence which services survey respondents indicated use of.
- Riders typically used services rarely or one to three days a week, as opposed to four or more days per week.
- The most common trip purposes were shopping/household errands and medical-related trips.
- For those who must access a bus stop, walking was the most common access mode.
- Cash/coins and reduced fare were the most common fare payments/systems used.
- 57% of riders were satisfied or very satisfied with service and 31% were neutral.

### Non-Rider Characteristics

- Many of the non-riders drive themselves, with walking and asking a friend or neighbor for a ride being common options used as well.
- As noted above, non-riders were generally less familiar with available services.

### Challenges and Value of Transportation Services

- Several open-ended questions asked riders and non-riders about their challenges and what they value in transportation services. Key themes included:
  - Desire for more service frequency and covered shelters, especially on Cherriots Regional routes.
  - Respondents valued the friendly drivers and staff, availability of services, and affordability – especially for seniors.
  - Respondents showed interest in more direct service to Santiam Hospital, more Cherriots Local service frequency in Salem-Keizer, service to Falls City, and more regional connections beyond the county as geographic areas they'd like more service to.

### Demographics and Other Information

- Most respondents indicated they lived in a city or town, with top areas they frequent being primarily Salem and Keizer. Many respondents indicated they travel to Dallas, Silverton, Independence, Stayton, Monmouth, Mount Angel, and Woodburn as well.
- Overall, participants identify as white (86%), female (67%), over 65 (60%), and retired (60%), and they live in an urban area (85%), have a driver's license (80%) and access to a vehicle (70%). Note that 37% experience a disability that impacts their mobility, 42% earn less than \$45K per year, and 45% live alone. While 43% of respondents utilize public transit, another 33% are not familiar with public transit.
- Both riders and non-rider respondents indicated they were retired. As many outreach events were at senior centers, this likely influenced results. Similarly most respondents overall were age 65 or over.
- Compared to non-riders, riders indicated higher rates of not having a driver's license, being of a racial/ethnic minority, having lower income, having a disability affecting their mobility, and not having access to a working vehicle at home. They also indicated more people living in their household and higher rates of children living at home. Two rider respondents indicated that they or someone in their household has trouble speaking English to conduct daily activities, while non-riders did not indicate this.

## CHAPTER 5. GOALS AND OBJECTIVES

The goals and objectives identified for the Coordinated Plan Update focus on the transportation needs, gaps, and challenges of seniors and people with disabilities in Marion and Polk counties. The Plan Update supports the development of long-term funding strategies for the Salem Area Mass Transit District (“District”), or Cherriots, the qualified entity for determining how STIF and §5310 dollars are spent in the rural and urban areas of Marion and Polk counties. This chapter documents the goals and objectives of the 2024 Cherriots Coordinated Plan Update.

The goals and objectives established in the 2024 Cherriots Coordinated Plan Update considered relevant state and previous District plans to ensure that the Coordinated Plan Update aligns with long-term public transit goals. These plans support the development of strategies to enhance public transit in Marion and Polk counties, with a focus on the needs of seniors and people with disabilities. The following sections present relevant goals, objectives, and performance measures of relevant plans and policies, including:

- Oregon Public Transportation Plan (2018)
- Cherriots Coordinated Transportation Human Services Plan (Coordinated Plan, 2019)
- Cherriots Long Range Transit Plan (LRTP) (2022)
- SAMTD Strategic Plan (FY 2024)

The Salem Area Mass Transit District (SAMTD) Strategic Plan for Fiscal Year (FY) 2024 establishes 4 core areas of service/operations:

- Community Value
- Customer Satisfaction
- Culture of Ownership
- Financial Sustainability

The review of relevant plans, feedback from public engagement, and discussions with the District formed the basis for the draft goals and objectives for the Coordinated Plan Update. The three draft goals and associated objectives for each goal are summarized below. More information about the reviewed plans can be found in Appendix E: Memo #4 – Goals and Objectives.

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**Goal 1: Provide safe and reliable transportation options that are equitable and accessible to all users, with a focus on seniors and people with disabilities.**

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SAMTD Strategic Plan Core Areas: Community Value and Customer Satisfaction



- Objective 1A: Seek opportunities to increase service frequency and coverage in both urban and rural areas of Marion and Polk counties
- Objective 1B: Increase access to key destinations by balancing stop locations, especially near essential medical and grocery services
- Objective 1C: Improve the safety and accessibility of transit options and all parts of a rider's journey
- Objective 1D: Maintain communication and marketing, in multiple languages, to increase public awareness of available transit options
- Objective 1E: Enhance the availability of information about services and how to ride them, in particular via travel training programs

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## Goal 2: Maintain and expand transportation options in Marion and Polk counties via partnerships with other programs and providers.

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### SAMTD Strategic Plan Core Areas: Community Value and Customer Satisfaction

- Objective 2A: Foster support for medical transportation providers and coordinate with medical centers to ensure access for patients
- Objective 2B: Seek opportunities to enhance carpool or vanpool programs, potentially via volunteer-based programs
- Objective 2C: Continue to connect and coordinate local and regional transit options, including those beyond Marion and Polk counties
- Objective 2D: Promote coordination with human service agencies, senior centers, and other community resource groups to provide equitable resources and transportation to all users

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## Goal 3: Enhance Cherrriots and others' stability in order to provide reliable transportation options.

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### SAMTD Strategic Plan Core Areas: Funding Sustainability and Culture of Ownership

- Objective 3A: Develop guidelines, prioritization criteria, and other decision-making mechanisms that support implementation of strategies addressing the needs of key populations
- Objective 3B: Seek additional funding to maintain and enhance service options
- Objective 3C: Monitor opportunities for cost-saving measures, especially those that promote and extend other goals such as alternative fuels
- Objective 3D: Continue to recruit, train, and retain staff

## CHAPTER 6. NEEDS

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 from September to November 2023, and applicable continued needs from the Cherriots 2019 Coordinated Plan. These needs are shown by category, and are not prioritized. Service decisions should be made using the prioritization shown in Chapter 7, and are contingent on available resources.



### Transportation Service Needs

- Increase service hours and frequency for both fixed-route and demand-response services
  - Expand service extent to include more service in the early morning and later evening
  - Increase weekend and holiday service
  - Increase frequency of commuter and midday (10 a.m. – 2 p.m.) routes
- Increase service coverage in both rural and urban areas of Marion and Polk counties
  - Enhance services to unserved or underserved areas (primarily Cherriots Regional service), including “lifeline” service to small communities, rural, and low-density areas such as:
    - Aumsville, Dallas, Detroit, Donald, Falls City, Gates, Grand Ronde, Idanha, Independence, Jefferson, Mill City, Monmouth, Mt. Angel, Rickreall, Scotts Mills, Silverton, St. Paul, Stayton, and Turner
    - Unincorporated north and east Marion County and western Polk County, including Marion and Linn counties’ portions of the Santiam Canyon
    - Urban areas of Salem and Keizer where service may not be available
  - Expand services to communities in other counties, such as:
    - Albany, Lincoln City, McMinnville, Canby, Oregon City, Portland, Tualatin, and Wilsonville
- Expand service to basic needs destinations and destinations essential to life such as shopping, groceries, social services, and medical facilities
- Increase service quality
- Increase frequency of service and reduce travel time
- Improve reliability, schedule adherence, and on-time arrivals
- Add additional stops to decrease walking distances and increase accessibility
- Expand dial-a-ride (DAR) services for seniors and individuals with disabilities who have difficulty accessing fixed-route transit services
- Expand DAR service to Falls City, Dallas, and other small rural communities
- Expand DAR services for basic needs such as shopping, medical, and recreational destinations
  - Increase door-to-door and door-through-door paratransit service in Polk County outside of the Salem UGB area and in southern Marion County
  - Improve transit service for underserved groups, such as:
    - 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, especially for grades 9 through 12
- People who are unable to schedule service in advance
- People who are unable to accommodate lengthy trip times
- People who attend addiction counseling/group therapy services in Polk County
- Enhance volunteer-based carpool or vanpool programs, especially those that provide medical services



## Infrastructure Needs

- Enhance accessibility of stops and vehicle fleet, especially on fixed routes, to meet a range of physical needs of riders and right-sizing of fleet
  - Improve bus stop amenities
  - Improve accessibility at bus stops (e.g. ADA-compliant curb ramps, level sidewalks)
  - Provide covered bus shelters, lights, and trash receptacles
  - Enhance signage for bus stops and shelters
- Improve pedestrian accessibility
  - Enhance crosswalks near bus stops
  - Complete gaps in sidewalk network
  - Locate stops where pedestrian access is available/ comfortable
- Improve bicycle accessibility
- Consider nearby activity centers, such as senior centers, medical centers, and schools where accessibility needs may vary stop and access needs
- Establish 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
  - Santiam Hospital, Salem Health, West Valley Hospital, Legacy Silverton Medical Center, Garten Services, etc.
- Establish central dispatch for transportation services
  - Apply technological solutions to facilitate coordination efforts
- Explore faresharing across systems to reduce rider costs and promote transit use



## Marketing, Customer Service, and Outreach Needs

- Increase accountability, customer service, responsiveness, and human interaction
- Increase availability of information in Spanish and other languages commonly spoken in local communities. Where significant Limited English Proficiency (LEP) populations exist, materials could be translated into specific languages other than Spanish upon request.
- Utilize Service Integration Teams (SIT) to share information about existing services to regional social service providers
- Perform outreach events to senior centers, city advisory committees, community centers, schools, and other organizations that have high concentrations of seniors and individuals with disabilities who may not know about what services are currently available to them
- Hold travel training group sessions for seniors and individuals with disabilities through local senior centers, community centers, or other organizations that have groups interested in learning about how to use transit to get to places they want to go
- Improve access to and availability of information, education, and outreach about the range of transportation providers and services in both the urban and rural areas
- Increase service advertising
  - Improve information about the availability of different transit services (e.g. Cherriots Regional and Cherriots Local) and how they work together
  - Advertise through traditional media such as radio, local publications, bus shelters, 211 service, kiosks, brochures, etc.
  - Advertise through new media opportunities such as Instagram, Facebook, Twitter (now "X"), etc.
  - Target advertising/outreach to specific groups (e.g. churches, social service agencies, senior centers, visually impaired communities), and at destinations such as hospitals
  - Increase advertising for travel training information and services
- Increase number of volunteer drivers



## Technology Needs

- Consider on-demand service pilots
- Implement security cameras on vehicle fleet
- Implement speaking/digital schedules at bus stops
- Implement electronic signs at transit centers and major bus stops listing the next bus arrival
- Implement Automatic Vehicle Location (AVL) and/or GPS systems for real-time tracking on buses and other fleet vehicles
- Provide text alerts on additional transit services
- Provide scheduling and dispatch support to medical providers

- Seek innovative opportunities to continue enhancing the electronic fare system and making it more accessible to populations that are less proficient in technology



## Capital and Funding Needs

- Maintain bus fleet
- Pursue funding to maintain and enhance the existing and potential expansion vehicles in the fleet and available transit service
- Maintain affordability of fares for populations that need it; maintain a single fare system across Cherriots Local and Cherriots Regional services in order to make it affordable to those who use both systems
- Maintain the free youth fare on all Cherriots services in order to promote travel by transit and build the next generation of transit riders

## CHAPTER 7. PRIORITIES AND STRATEGIES

This chapter presents an overview of identified priorities and strategies to improve mobility for older adults, people with disabilities, and people with low income in Marion and Polk counties.

### Priorities

The following priorities, provided in order of importance, are considerations for funding of Section 5310 and STIF funding that serves seniors and individuals with disabilities. All funding decisions should follow the appropriate requirements for cost-effectiveness and equity in the appropriate STIF and/or Section 5310 applications (such as \$ per ride, % match), but balance that with the need to provide accessibility throughout Marion and Polk counties.

1. Maintaining and/or enhancing existing services to connect rural locations in Marion and Polk counties with Salem-Keizer and Portland.
  - a. More frequency for weekday and weekend service.
  - b. Later evening service.
  - c. Increased number of stops in communities for Cherriots Regional express routes, which decreases the distance people have to walk to access transit.
2. Providing adequate capital replacements and maintenance of vehicles and other fundamental requirements to provide service.
3. Providing on-demand services such as dial-a-ride, door-to-door services, especially when going to and from quality-of-life destinations such as medical, shopping, local appointments, and visiting family and friends. Partnering with hospitals to provide reliable on-demand services such as the CareVan in Silverton and the Connections Van in Dallas to bring patients to their medical appointments. Prefer paid drivers versus volunteer driver programs because of the reliability of the service and the perception of safety when drivers are paid. Cost sharing for more costly services should be considered to provide accessibility.
4. Conducting active outreach, travel training, and marketing to seniors and individuals with disabilities in all the communities served by Cherriots. Many seniors do not use a computer or smartphone, so in-person and printed marketing materials are preferred. Senior centers are a key partner to get information out to community members.
5. Enhancing safety and security on buses, at bus stops, and at transit centers to make people feel like they can travel safely.
  - a. Cleaning buses, bus stops, and shelters
  - b. Providing bus stop amenities such as lighting, shelters, benches, and trash receptacles
6. Increasing reliability and on-time performance of on-demand services, including Cherriots LIFT.
7. Partnering with local jurisdictions to build accessible routes to bus stops and transit centers, and to make all bus stops compliant with the Americans with Disabilities Act (ADA).
8. Implementing an electronic fare system that works across multiple jurisdictions and services.
9. Maintaining affordability of transit services, especially for dial-a-ride services.

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## Strategies

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Strategies are shown by need category developed in Chapter 6. Though strategies are shown by category and are not prioritized, factors such as funding availability and partnerships with other organizations will influence which are capable of being implemented, and can be guided by the priorities in the previous section. Strategies are intended to build on, refine, and market the existing productive routes and services. Generally, larger expansions to service and infrastructure improvements come with higher cost, though there is some opportunity for economies of scale savings. Activities like coordination and marketing can be low-cost ways to improve rider experience and increase use of existing services and programs.



### Transportation Service Strategies

- Sustain current service levels, considering equity and service performance
- As funding allows, implement the Long Range Transit Plan (LRTP) and other recent plans
- Follow Cherriot's Service Guidelines to address gaps in public transit services
- Identify areas with the greatest need for additional or enhanced transit services and apply new funding towards these identified needs
- Increase weekend and holiday service on Cherriot's Local and Cherriot's Regional fixed routes
- Extend morning and evening hours on fixed routes during the weekdays
- Improve frequencies where service is too infrequent
- Increase capacity of existing volunteer carpool or vanpool programs by increasing the fleet of accessible vehicles for community-based services
- Explore options for microtransit, circulator, feeder route, and flexible route or dial-a-ride services
- Improve regional connections between modes and service providers, especially connections to unserved or underserved communities
- Expand service coverage to more basic needs destinations and destinations essential to life
- 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 Get There Oregon 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 and shared use mobility options that provide first-and-last-mile connectivity to transit destinations
- 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 design principles that promote visibility and comfort on new or upgraded transit facilities



## Coordination and Organizational Strategies

- Develop a calendar in line with state and federal requirements for staff to periodically review the Coordinated Plan and to bring an assessment to the STIFAC to evaluate progress and make updates as needed. At the time of this writing, the Coordinated Plan is expected to be updated every four or five years.
- Coordinate with medical facilities, seniors and/or people with disabilities transportation consumers, and their representatives to optimize trip scheduling (e.g., Legacy Silverton Medical Center program, Salem Health, etc.)
- Coordinate with public and private sector organizations to identify opportunities for joint scheduling or sharing of vehicles (e.g., senior centers)
- 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)



## Marketing, Customer Service, and Outreach Strategies

- Develop and distribute information promoting travel options, counseling services, travel training, and web application-based information systems
- Coordinate with medical, social, senior center, employers, and other organizations to share information about local transportation options and training opportunities
- Increase communication and marketing efforts to make members of the public and policymakers 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, including the electronic fare payment system



- Enhance and develop travel training materials such as videos, educational brochures, translated materials, and provide on-location presentations by customer service representatives and travel trainers
- Conduct outreach to increase the number and geographic area of volunteer drivers
- Survey riders for feedback to improve drop-off and pick-up locations



## Technology Strategies

- Develop and test new technologies 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
- Explore implementation of new technologies at bus stops such as speaking/digital schedules and electronic signs to enhance accessibility
- Work toward 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
- Review bus inventory against route/rider needs. Seek grants that would enable “right sizing” of vehicles, that balances ridership and capacity with maneuverability and fuel efficiency
- Advocate for adequate capital replacements
- Continue to develop and implement vehicle maintenance schedules
- Review the funding application process and application materials on a biennial basis; revise to match the grant funding sources as changes are adopted by funding agencies

Table 4 aligns these needs and strategies, but doesn't necessarily list them in priority order. Priorities are listed on p.56 in order of importance.

**Table 4. Needs and Strategies**

Unmet Transportation Needs	Corresponding Strategies
<b>Transportation Service</b>	
<ul style="list-style-type: none"> <li>• Increase service hours and frequency                             <ul style="list-style-type: none"> <li>• Expand service into the early morning and later evening</li> <li>• Increase weekend and holiday service</li> <li>• Increase frequency of commuter and midday (10 a.m. – 2 p.m.) routes</li> </ul> </li> <li>• Increase service coverage in both rural and urban areas of Marion and Polk counties                             <ul style="list-style-type: none"> <li>• Enhance services to unserved or underserved areas (primarily Cherriotics Regional service), including small communities, rural, and low-density areas such as:                                     <ul style="list-style-type: none"> <li>• Aumsville, Dallas, Detroit, Donald, Falls City, Gates, Grand Ronde, Idanha, Independence, Jefferson, Mill City, Monmouth, Mt. Angel, Rickreall, Scotts Mills, Silverton, St. Paul, Stayton, and Turner</li> <li>• Unincorporated north and east Marion County and western Polk County, including Marion and Linn county portions of the Santiam Canyon</li> <li>• Urban areas of Salem and Keizer where service may not be available</li> </ul> </li> <li>• Expand services to communities in other counties, such as:                                     <ul style="list-style-type: none"> <li>• Albany, Lincoln City, McMinnville, Canby, Oregon City, Portland, Tualatin, and Wilsonville</li> </ul> </li> </ul> </li> <li>• Expand service to basic needs destinations and destinations essential to life such as shopping, groceries, social services, and medical facilities</li> <li>• Increase service quality</li> <li>• Increase frequency of service and reduce travel time</li> <li>• Improve reliability, schedule adherence, and on-time arrivals</li> <li>• Add additional stops to decrease walking distances and increase accessibility</li> <li>• Expand dial-a-ride (DAR) services for seniors and individuals with disabilities who have difficulty accessing fixed-route transit services</li> <li>• Expand DAR service to Falls City, Dallas, and other small rural communities</li> <li>• Expand DAR services for basic needs such as shopping, medical, and recreational destinations                             <ul style="list-style-type: none"> <li>• Increase 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>• Improve transit service for underserved groups, such as:                                     <ul style="list-style-type: none"> <li>• 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</li> <li>• Youth, especially for grades nine through 12</li> <li>• People who are unable to schedule service in advance</li> <li>• People who are unable to accommodate lengthy trip times</li> <li>• People who attend addiction counseling/group therapy services in Polk County</li> </ul> </li> </ul> </li> <li>• Enhance volunteer-based carpool or vanpool programs, especially those that provide medical services</li> </ul>	<ul style="list-style-type: none"> <li>• Sustain current service levels, considering equity and service performance.</li> <li>• As funding allows, implement the Long Range Transit Plan (LRTP) and other recent plans.</li> <li>• Follow Cherriotics Service Guidelines to address gaps in public transit services.</li> <li>• Identify areas with the greatest need for additional or enhanced transit services and apply new funding towards these identified needs.</li> <li>• Increase weekend and holiday service on Cherriotics Local and Cherriotics Regional fixed routes.</li> <li>• Extend morning and evening hours on fixed routes during the weekdays.</li> <li>• Improve frequencies where service is too infrequent.</li> <li>• Increase capacity of existing volunteer carpool or vanpool programs by increasing the fleet of accessible vehicles for community-based services.</li> <li>• Explore options for microtransit, circulator, feeder route, and flexible route or dial-a-ride services.</li> <li>• Improve regional connections between modes and service providers, especially connections to unserved or underserved communities.</li> <li>• Expand service coverage to more basic needs destinations and destinations essential to life.</li> <li>• 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.</li> <li>• Explore opportunities to expand Get There Oregon or develop a new platform for ride-matching for seniors and people with disabilities.</li> </ul>

Unmet Transportation Needs	Corresponding Strategies
<b>Infrastructure</b>	
 <ul style="list-style-type: none"> <li>• Enhance accessibility of stops and vehicle fleet, especially on fixed routes, to meet a range of physical needs of riders and right-sizing of fleet                             <ul style="list-style-type: none"> <li>• Improve bus stop amenities</li> <li>• Improve accessibility at bus stops (e.g. ADA-compliant curb ramps, level sidewalks)</li> <li>• Provide covered bus shelters, lights, and trash receptacles</li> <li>• Enhance signage for bus stops and shelters</li> </ul> </li> <li>• Improve pedestrian accessibility                             <ul style="list-style-type: none"> <li>• Enhance crosswalks near bus stops</li> <li>• Complete gaps in sidewalk network</li> <li>• Locate stops where pedestrian access is available/ comfortable</li> </ul> </li> <li>• Improve bicycle accessibility</li> <li>• Consider nearby activity centers, such as senior centers, medical centers, and schools where accessibility needs may vary stop and access needs</li> <li>• Establish small transit centers in communities without a transit center or major transit stop with a shelter</li> </ul>	<ul style="list-style-type: none"> <li>• Review existing pedestrian plans in Marion and Polk counties for opportunities and funding sources to improve sidewalk and pedestrian infrastructure and shared use mobility options that provide first-and-last-mile connectivity to transit destinations.</li> <li>• Prioritize bus stop locations needing improvements.</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 and roads.</li> <li>• Develop strategies (e.g., incentives, mutual planning requirements) to influence the siting of facilities that provide services to seniors and/or people with disabilities.</li> <li>• Create a safer transit environment by following design principles that promote visibility and comfort on new or upgraded transit facilities.</li> </ul>
<b>Coordination and Organizational</b>	
 <ul style="list-style-type: none"> <li>• Coordinate services that cross jurisdictional and transit provider service area boundaries                             <ul style="list-style-type: none"> <li>• Reduce duplication of services</li> <li>• Maintain and enhance service connectivity among local operators</li> </ul> </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                             <ul style="list-style-type: none"> <li>• Santiam Hospital, Salem Health, West Valley Hospital, Legacy Silverton Medical Center, Garten Services, etc.</li> </ul> </li> <li>• Establish central dispatch for transportation services                             <ul style="list-style-type: none"> <li>• Apply technological solutions to facilitate coordination efforts</li> </ul> </li> <li>• Explore faresharing across systems to reduce rider costs and promote transit use</li> </ul>	<ul style="list-style-type: none"> <li>• Develop a calendar in line with state and federal requirements for staff to periodically review the Coordinated Plan and to bring an assessment to the STIFAC to evaluate progress and make updates as needed. At the time of this writing, the Coordinated Plan is expected to be updated every four or five years.</li> <li>• Coordinate with medical facilities, seniors and/or people with disabilities transportation consumers, and their representatives to optimize trip scheduling (e.g., Legacy Silverton Medical Center program, Salem Health, etc.).</li> <li>• Coordinate with public and private sector organizations to identify opportunities for joint scheduling or sharing of vehicles (e.g., senior centers).</li> <li>• 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).</li> </ul>

Unmet Transportation Needs	Corresponding Strategies
<b>Marketing, Customer Service, and Outreach Needs</b>	
 <ul style="list-style-type: none"> <li>• Increase accountability, customer service, responsiveness, and human interaction</li> <li>• Increase availability of information in Spanish and other languages commonly spoken in local communities. Where significant Limited English Proficiency (LEP) populations exist, materials could be translated into specific languages other than Spanish upon request.</li> <li>• Utilize Service Integration Teams (SIT) to share information about existing services to regional social service providers</li> <li>• Perform outreach events to senior centers, city advisory committees, community centers, schools, and other organizations that have high concentrations of seniors and individuals with disabilities who may not know about what services are currently available to them</li> <li>• Hold travel training group sessions for seniors and individuals with disabilities through local senior centers, community centers, or other organizations that have groups interested in learning about how to use transit to get to places they want to go</li> <li>• Improve access to and availability of information, education, and outreach about the range of transportation providers and services in both the urban and rural areas</li> <li>• Increase service advertising                         <ul style="list-style-type: none"> <li>• Improve information about the availability of different transit services (e.g. Cherriots Regional and Cherriots Local) and how they work together</li> <li>• Advertise through traditional media such as radio, local publications, bus shelters, 211 service, kiosks, brochures, etc.</li> <li>• Advertise through new media opportunities such as Instagram, Facebook, Twitter (now "X"), etc.</li> <li>• Target advertising/outreach to specific groups (e.g. churches, social service agencies, senior centers, visually impaired communities), and at destinations such as hospitals</li> <li>• Increase advertising for travel training information and services</li> </ul> </li> <li>• Increase number of volunteer drivers</li> </ul>	<ul style="list-style-type: none"> <li>• Develop and distribute information promoting travel options, counseling services, travel training, and web application-based information systems.</li> <li>• Coordinate with medical, social, senior center, employers, and other organizations to share information about local transportation options and training opportunities.</li> <li>• Increase communication and marketing efforts to make members of the public and policymakers aware of transportation options.</li> <li>• Encourage seniors and people with disabilities to use online trip planning tools.</li> <li>• Explore a fare assistance program for people whose primary barrier to using public transit is financially based.</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 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, including the electronic fare payment system.</li> <li>• Enhance and develop travel training materials such as videos, educational brochures, translated materials, and provide on-location presentations by customer service representatives and travel trainers.</li> <li>• Conduct outreach to increase the number and geographic area of volunteer drivers.</li> <li>• Survey riders for feedback to improve drop-off and pick-up locations.</li> </ul>
<b>Technology Needs</b>	
 <ul style="list-style-type: none"> <li>• Consider on-demand service pilots</li> <li>• Implement security cameras on vehicle fleet</li> <li>• Implement speaking/digital schedules at bus stops</li> <li>• Implement electronic signs at transit centers and major bus stops listing the next bus arrival</li> <li>• Implement Automatic Vehicle Location (AVL) and/or GPS systems for real-time tracking on buses and other fleet vehicles</li> <li>• Provide text alerts on additional transit services</li> <li>• Provide scheduling and dispatch support to medical providers</li> <li>• Seek innovative opportunities to continue enhancing the electronic fare system and making it more accessible to populations that are less proficient in technology</li> </ul>	<ul style="list-style-type: none"> <li>• Develop and test new technologies 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>• Explore implementation of new technologies at bus stops such as speaking/digital schedules and electronic signs to enhance accessibility.</li> <li>• Work toward 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>



Unmet Transportation Needs	Corresponding Strategies
<b>Capital and Funding Needs</b>	
<ul style="list-style-type: none"> <li>• Maintain bus fleet</li> <li>• Pursue funding to maintain and enhance the existing and potential expansion vehicles in the fleet and available transit service</li> <li>• Maintain affordability of fares for populations that need it; maintain a single fare system across Cherriots Local and Cherriots Regional services in order to make it affordable to those who use both systems</li> <li>• Maintain the free youth fare on all Cherriots services in order to promote travel by transit and build the next generation of transit riders</li> </ul>	<ul style="list-style-type: none"> <li>• Advocate for increased funding and seek out new and innovative funding opportunities.</li> <li>• Review bus inventory against route/rider needs. Seek grants that would enable “right sizing” of vehicles, that balances ridership and capacity with maneuverability and fuel efficiency.</li> <li>• Advocate for adequate capital replacements.</li> <li>• Continue to develop and implement vehicle maintenance schedules.</li> <li>• Review the funding application process and application materials on a biennial basis; revise to match the grant funding sources as changes are adopted by funding agencies.</li> </ul>

## CHAPTER 8. 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 the data indicates that 80 to 90 percent of people want to stay in their homes 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 made 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 2020 US Census, more than 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, seniors are more likely to have a disability. 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 be needed, there is a limit to how much Cherriots 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.

After adoption of the Coordinated Plan, Cherriots will take actions to implement the plan. Some general strategies, initiatives, and opportunities in the short run would include:

1. Cherriots staff to develop a strategy for Coordinated Plan implementation. As needed, the STIFAC and public and private stakeholders will be included in order to gain feedback on the proposal for Coordinated Plan implementation.
2. Cherriots 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. Cherriots staff to develop service area guidelines for all Cherriots 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 STIF and Section 5310 funding and application processes. Sample applications and instructions are included in Appendix F.

## APPENDIX A. PUBLIC INVOLVEMENT SUMMARY

# Public Involvement Summary

Transportation is a key determinant of health and wellness. Multiple studies show that 80 to 90 percent of people want to stay in their homes as long as possible. One of the most important elements of a livable community is adequate transportation to access medical care and other essential services.

About every four years, Salem Area Mass Transit District (District) updates its Coordinated Public Transit - Human Services Transportation Plan (Coordinated Plan) in order to evaluate transportation funding strategies for seniors and people with disabilities in Marion and Polk counties, Oregon. The results guide funding from the State of Oregon to the District, which acts as the funding administrator for services in Marion and Polk counties. Decisions made today on how 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 community members.

From September to November of 2023, the project team reached out to Marion and Polk County community members to listen, learn, identify improvements, and prioritize transportation and transit needs. The results of the five in-person events, one online session, and a survey are described below. About 150 individuals engaged, about half of them at hour-long sessions where staff were able to delve into the details of participant experiences and challenges.

## Public Involvement Event Take-Aways

Several key themes emerged from the public involvement events, including:

- **On-demand services** are highly valued and desired in all the communities that participated in the outreach. The most urgent need is for transport to medical services, but access to basic services such as groceries, local appointments, and visiting family was also highly desired.
- **Fixed-route services** are important as well:
  - More frequency will help people to visit nearby larger cities such as Salem and Portland.
  - More connections between Monmouth/Independence and Dallas.



- Education and marketing about what services are available and how to use them is very helpful – for example, people did not realize travel training is currently available for free through Cherriots.
- **Local circulators** in Silverton and Monmouth-Independence are much appreciated:
  - Participants requested that services are more flexible to facilitate pickup and drop-off. Getting to and from fixed-route transit stops is a significant barrier for many seniors and people with disabilities. The project team talked about how the current Monmouth-Independence (MI) Trolley “deviates” on request.
  - Expanding transit service times (hours per day) and days (especially in Silverton) would be a great asset to the community.
  - Local circulator services such as the MI Trolley build enthusiasm for transit and community support for service expansion.
- **Active outreach and sharing information** in a format that people can understand will increase ridership:
  - A significant percentage of seniors do not use a computer, and a lesser percent don’t have access to a smartphone. These folks are often the most in need of services, and the most in need of on-demand services.
  - Senior Centers provide an essential social network for many seniors and a collaboration opportunity for transit providers. Currently, lack of funding for transit providers makes it difficult for staff to help people meet their transportation needs.
  - Social connections are a key determinant of health for seniors. Creating more transit education opportunities framed as social events and outings will improve both ridership and health.

Participants responded to two open-ended questions, the questions and response themes included:

- What do you appreciate and value about transit services?
  - Friendly drivers
  - Timely and frequent service
  - Affordability
  - Safety
- What are your challenges with transit services?
  - Long wait times for connections
  - Late arrival and departure of Cherriots LIFT services
  - Inaccessible routes for people to get to/from bus stops and lack of accessible stops for wheelchairs

- Lack of: bus routes and access to rural areas, weekend and evening Cherriots Regional service, and frequency
- Inadequate shelters and lack of seats at bus stops
- Lack of access to medical appointments. Because it is difficult to access care, illness is not treated until it is too late

### ***Meeting Outcomes***

The project team carefully researched communities where additional outreach was needed and worked to schedule events at locations where seniors frequented. Senior Centers were ideal opportunities to connect with individuals who currently use transit and provide transportation services for others. The project team developed display boards and created an informal meeting atmosphere with snacks, refreshments, and Cherriots swag. After a round of introductions, the project team spent 10-15 minutes introducing the project and asking key questions. Most of the one-hour session was spent listening to participant experiences, answering questions, and taking notes. The feeling at the end of each session was positive and optimistic. The following are notes from each of the sessions:

#### ***Center 50+ Mobility Fair, 9/26/23, 1:30-5:30, 2615 Portland Rd NE in Salem, OR***

The Mobility Fair included a variety of stations for seniors to learn about transportation options available to them in Marion and Polk counties. The project team met with participants and distributed online and hard copy surveys. Sixteen hard copy surveys were collected, and the team shared information and answered questions.

#### ***AARP Age Friendly Summit, 10/10/23 from 8 AM to 4 PM at Western Oregon University, 400 Monmouth Avenue North in Monmouth, OR***

The project team conducted outreach during the all-day AARP Summit, held in Monmouth, Oregon. Several people from Marion and Polk counties shared their transit experiences.

Two major themes were:

- Increasing frequency of fixed-routes
- More on-demand services

Specific comments included:

- Decrease the wait time for dial-a-ride
- Implement a versatile transit card that works for multiple districts/services

- Conduct more robust and active outreach for input on service change proposals.
- Maintain existing bus routes. Changing routes impacts people who moved to a specific area in order to easily access a route. When you shift the route, it has a huge impact on people's lives.
- Increase accessibility to transit stops
- Increase bus buddy - more support needed for door-to-door

***Silverton Senior Center, 10/18/23, Noon to 1 PM at the Silverton Senior Center, 115 Westfield St. in Silverton, OR***

10 people gathered at the Silverton Senior Center to discuss transit. Experiences within the group included individuals who don't use a computer, who experience a disability, and who do not have access to a vehicle on a regular basis. The Senior Center Director provided valuable information about Center participants. Comments centered on the need for additional frequency of existing Cherriots fixed-route (Route 20X - N. Marion County), more on-demand services such as the Silver Trolley and Legacy Silverton Medical Center CareVan, and the need for support/training on how to use the bus. Overall, people identified better transit access to medical appointments as a need. They were also interested in group activities that would allow them to visit other areas, such as Salem and Portland. Participant feedback about needs and desired improvements are included below.

*Local*

- Silverton Silver Trolley:
  - Saturday/Sunday service (service existed pre-COVID)
  - Service after 5 PM
- Timeframes on the regional buses are too infrequent
- Don't have Uber or Lyft in Silverton, and accessing fixed-route bus stops is difficult if it's more than a mile away, such as from South Silverton.
- A small fixed-route bus with more frequent service, plus dial-a-ride is desired in Silverton.
- ¼ of Senior Center participants ONLY have a phone, they don't use a computer.
- I live 3 miles from a bus stop (South Silverton), so access to the route is a big problem.
- Perhaps a "deviated fixed-route" would be a good option for Silverton
- Design services to connect to areas where students and seniors live (apartments, retirement homes, and other supportive facilities)

- The Senior Center has an informal list of people willing to drive others to appointments, and people who need transportation support. If we could formalize this and access a vehicle, then we could create a local door-to-door service.
- I appreciate the dependability and professionalism of paid drivers. Volunteer-based programs are problematic.
- The Trolley has extra vans they are currently not using. Would it be possible to gain access to those vans, or somehow get them circulating and in use?
- I just want to be able to get to Safeway easily

*Regional*

- Need support for navigating how to use Cherriots services
- Woodburn/Mt. Angel transit access to medical services is very difficult, need better on-demand/door-to-door services
- Due to my visual disability, I needed to pay \$200 to Uber to visit my daughter in Portland for a day.
- I need a brochure, or print material that will help me understand how to use the transit. The computer doesn't work for me.
- I would enjoy going to Salem or Portland on the bus with a group to learn how to use transit and connect with others (multiple people affirmed this concept)
- Could the Travel Trainer with Cherriots visit Silverton and do a trip with us?
- Could Cherriots table at community events?

***Online Public Meeting, 10/23/23, Noon to 1 PM***

One participant joined, Jennifer Taylor, new scheduler for the Legacy Silverton Medical Center CareVan that services Woodburn/Silverton/Salem. The CareVan only serves Legacy clients, so it is a limited service. They take people to medical appointments in Silverton, Woodburn, and Salem from places such as Stayton, Aumsville, Woodburn, Molalla, and Keizer. Here's a summary of the conversation:

Q. Can you go to other areas, such as grocery? A: No. CareVan vehicles are run by volunteers, and only operate 2 days a week currently due to lack of drivers available to run people to their appointments; the CareVan takes people only to their medical appointments, door-to-door.

Q: Are there Spanish speaking calls? A: Yes. We do serve Woodburn, use medical interpreters, and we do have riders who speak Spanish.

Q. How about paying drivers? A: Woodburn is a paid driver, Silverton are volunteers, just haven't been busy enough. Goal is to provide more days in the week. Legacy isn't in a hiring position due to OHSU merger conversations.

Q. Do you use an online platform for scheduling? A: We are doing a manual process so far, Woodburn – instant message with need, then I put it in our schedule. For the folks we serve, paper is needed. 25% don't have a computer. My email is jetaylo@lhs.org.

Q: Do you work with DHS or other non-profits, such as the service integration team? A: Not currently, but please send this info, that would be helpful.

***Monmouth Senior Center, 11/06/23, 1-2 PM, 180 Warren St S, Monmouth, OR***

Six people joined the meeting, including the Senior Center Director, two front desk volunteers with years of experience with Center participants, a couple who provide rides to friends on a regular basis, and a former on-demand bus driver. Participant feedback about needs and desired improvements are included below.

- We provide rides to medical services in Dallas because our friends have no other options at this time.
- The Trolley is fantastic, but we also need on-demand services that are open to anyone that needs it.
- I work at the front desk at the Senior Center, and people ask me for help with bus schedules and how to get places. I don't have access to the information to help them.
- Transportation services are so limited, I help two friends to get to their appointments and buy groceries.
- Before my job as the Center Director, I worked in long term care. On-demand services were only available a few days a week. Several services were too expensive. We need something available for all ages.
- Our population is growing old - in 2045 there will be more people over 65 than under 18. Transit investments are permanent and the need is growing. My father was a bus driver and I took the bus as a student.
- Former program: Seniors Helping Seniors - 3-4 volunteer drivers, but there were liability issues. Need something current! We have DoorDash, how do we do "people dash"?
- Uber/Lyft is expensive
- My vehicle is unreliable, but people depend on me for rides.
- Currently, there is a lack of volunteer drivers for the Connections Van in Dallas.

- The Trolley can do a bit of a deviation, it's not just fixed-route. You have to call 24-hours in advance in order to make a reservation.
- Are there shelters and benches to/from Salem? Yes to Salem, less on way back. Most people are waiting at the shelters into Salem, but getting off the bus and not waiting on the way back.
- On-demand provides services to the most vulnerable - people who can't use the stairs, people in wheelchairs - this is critical.
- Travel training is a great idea.
- If we get enough people to support the idea, could we fund more transit in Monmouth? See examples in Silverton, Woodburn.
- The Trolley has "broken the ice" - it's very popular and well supported.
- For on-demand services, paid drivers are key. Drivers should be paid. It is also a safety issue.
- Monmouth is officially designated an Age-Friendly Community. We are coming back together in person to support each other. We will invite you back to our listening conversations around transportation.

***Canyon Community Health Collaborative, 11/14/23 at the Department of Human Services Offices at 11656 Sublimity Rd SE # 200 in Sublimity, OR***

Ted Stonecliffe attended the November 14, 2023 meeting of the Canyon Community Health Collaborative (CCHC), held at the Oregon Department of Human Services office in Sublimity, Oregon. He presented a [PowerPoint](#) that was very similar to the online presentation given on Zoom on October 23rd. Highlights included what the existing services in Marion and Polk counties are today and a discussion of what the group perceives as the needs for transportation in the Santiam Canyon today. Some of the needs voiced were:

- The CCHC will be developing a "resource hub" near the Santiam Hospital in Stayton and would like to see a bus stop at the hospital in order for people in the canyon to access those services and the hospital.
- RJ Navarro (who is on the Cherriots Board of Directors) was present to talk about an organization he is associated with that works with people experiencing mental health challenges. They have a small school bus that they will be using to get their clients from Salem to Gates, where they will have activities.
- The director of the Santiam Outreach Community Center (SOCC) in Mill City mentioned her idea to have a van or bus go from Stayton to Idanha every 90 minutes so that people would have more frequent transportation to social services

in Stayton rather than twice a day. Ted said that he would be happy to put together a cost estimate and look at potential ridership in those communities. Volunteer driver programs and smaller vehicles that could pick people up at the homes or at designated bus stops were thought to be good solutions for their clients in the Santiam Canyon.

- Access to medical appointments in Stayton and Salem, and access to jobs at the mill on Lyons-Mill City Drive were major needs voiced by the SOCC.

# Survey Results

The project developed and shared an online and paper survey from September 26 through November 23, 2023, provided in English and Spanish and received about 70 completed surveys.

Key findings from the survey are below.

## *Desired Improvements:*

- The top desired improvements for existing riders included (1) bus routes that take them closer to where they want to go, (2) buses operating on Saturdays, and (3), more amenities at bus stops. Participants could select as many options as they wanted, and there was strong interest in all improvement types.
- The top desired improvements for non-riders included (1) improved service frequency, (2) bus routes that take them closer to where they want to go, and (3) bus service/stops closer to their home.
- Open ended responses indicated interest in grocery access, specific neighborhoods within Salem-Keizer, and connections to rural and regional destinations.

## *Existing Rider Use*

- Besides taking the bus, respondents indicated walking as their second-most used mode for traveling followed by driving themselves.
- Riders typically feel somewhat or very familiar with transportation services, more so than non-riders.
- Most respondents used Cherriots services, followed by the Monmouth-Independence Trolley and medical services. Fewer respondents were from Woodburn, Silverton, and neighboring counties which may influence which services survey respondents indicated use of.
- Riders typically used services rarely or 1-3 days a week, as opposed to 4 or more days per week.
- The most common trip purposes were shopping/household errands and medical-related trips.
- For those who must access a bus stop, walking was the most common access mode.
- Cash/coins and reduced fare were the most common fare payments/systems used.
- 57% of riders were satisfied or very satisfied with service and 31% were neutral.

## *Non-Rider Characteristics*

- Many of the non-riders drive themselves, with walking and asking a friend or neighbor for a ride being common options used as well.



- As noted above, non-riders were generally less familiar with available services.

#### *Challenges and Value of Transportation Services*

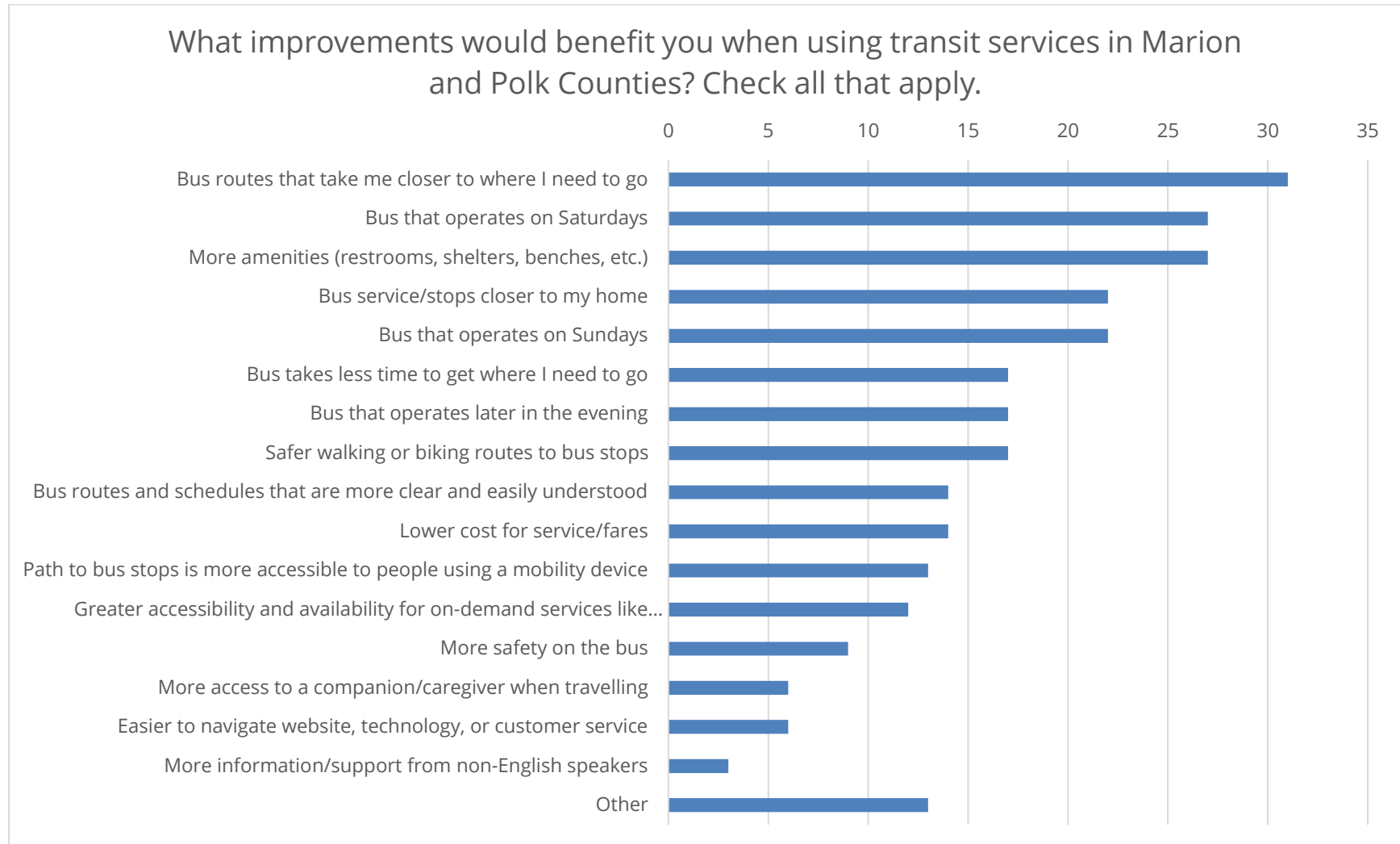
- Several open-ended questions asked riders and non-riders about their challenges and what they value in transportation services. Key themes included:
- Desire for more service frequency and covered shelters, especially on regional routes.
- Respondents valued the friendly drivers and staff, availability of services, and affordability – especially for seniors.
- Respondents showed interest in more direct service to Santiam Hospital, more local service frequency in Salem-Keizer, service to Falls City, and more regional connections beyond the County as geographic areas they'd like more service to.

#### *Demographics and Other Information*

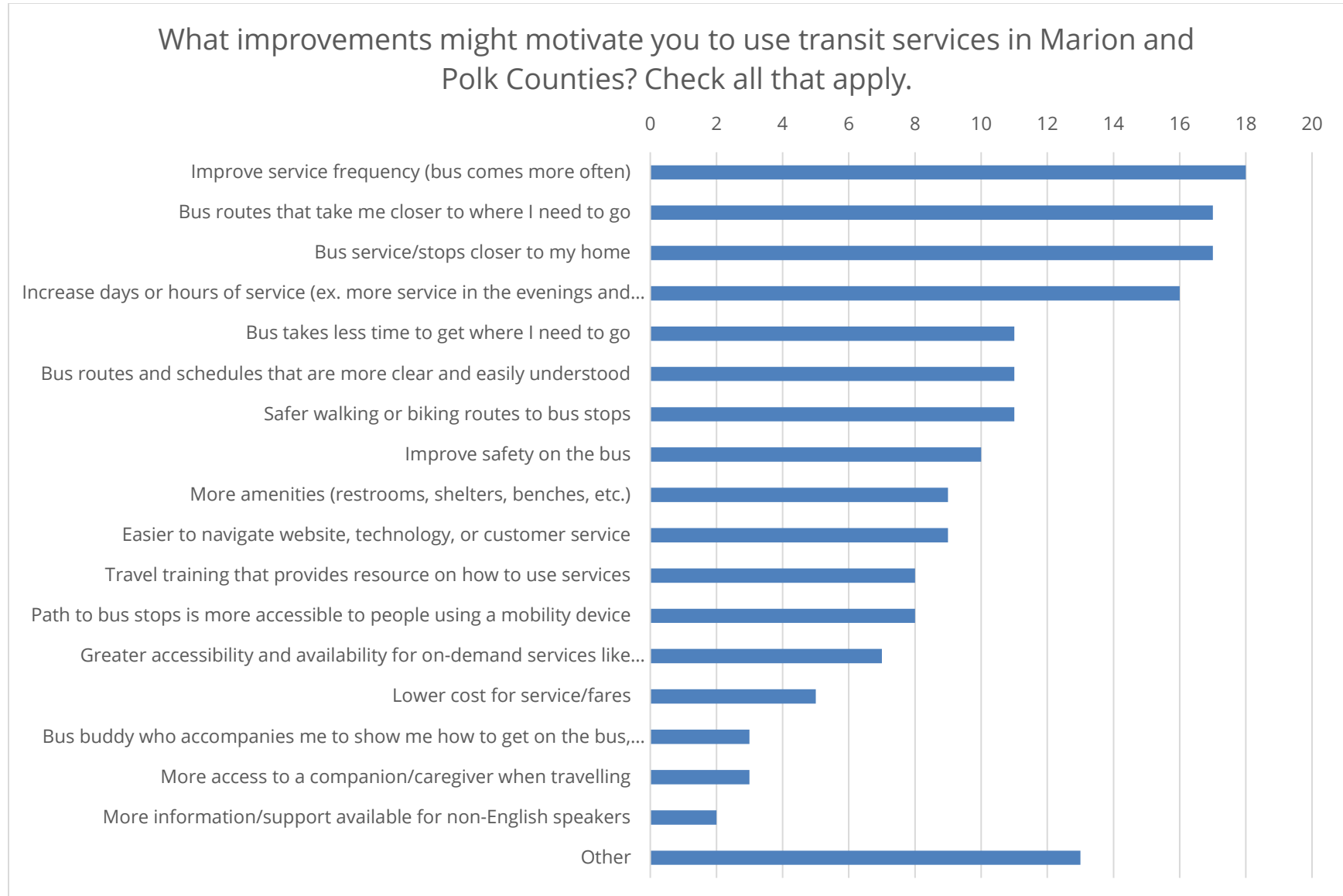
- Most respondents indicated they lived in a city or town, with top areas they frequent being primarily Salem and Keizer. Many respondents indicated they travel to Dallas, Silverton, Independence, Stayton, Monmouth, Mount Angel, and Woodburn as well.
- Overall, participants identify as white (86%), female (67%), over 65 (60%), and retired (60%), and they live in an urban area (85%), have a driver's license (80%) and access to a vehicle (70%). Note that 37% experience a disability that impacts their mobility, 42% earn less than \$45K per year, and 45% live alone. While 43% of respondents utilize public transit, another 33% are not familiar with public transit.
- Both riders and non-rider respondents indicated they were retired. As many outreach events were at senior centers, this likely influenced results. Similarly most respondents overall were age 65 or over.
- Compared to non-riders, riders indicated higher rates of not having a driver's license, being of a racial/ethnic minority, having lower income, having a disability affecting their mobility, and not having access to a working vehicle at home. They also indicated more people living in their household and higher rates of children living at home. Two rider respondents indicated that they or someone in their household has trouble speaking English to conduct daily activities, while non-riders did not indicate this.

## Desired Improvements

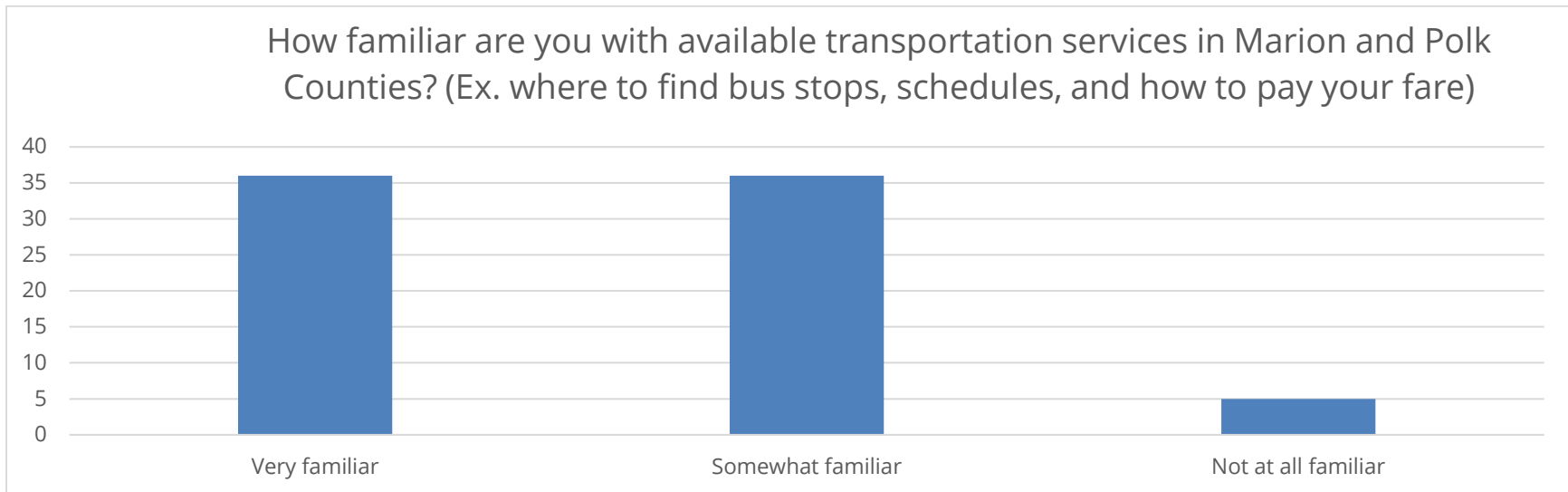
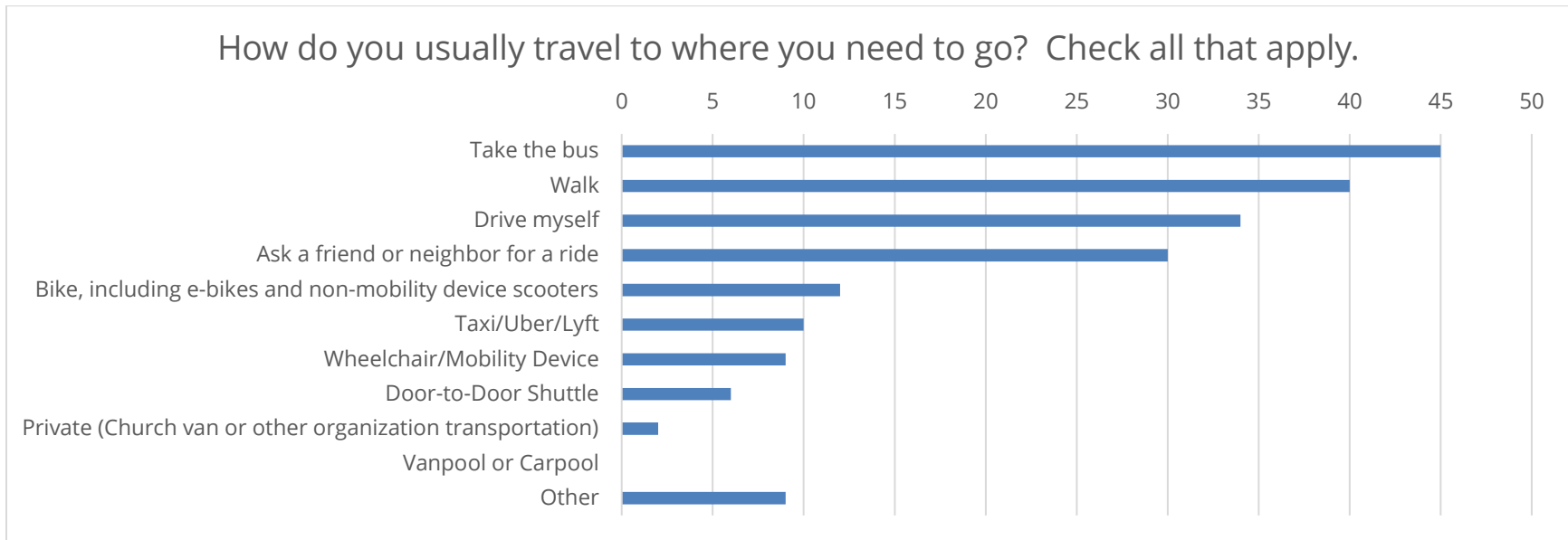
### Transit and Transportation Service Riders



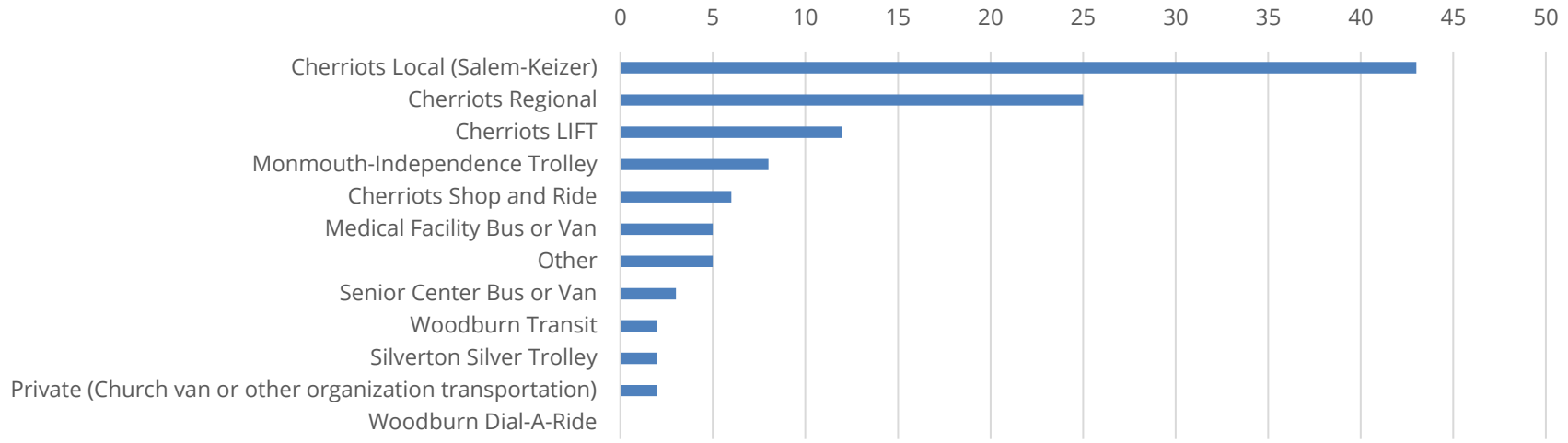
Non-Riders



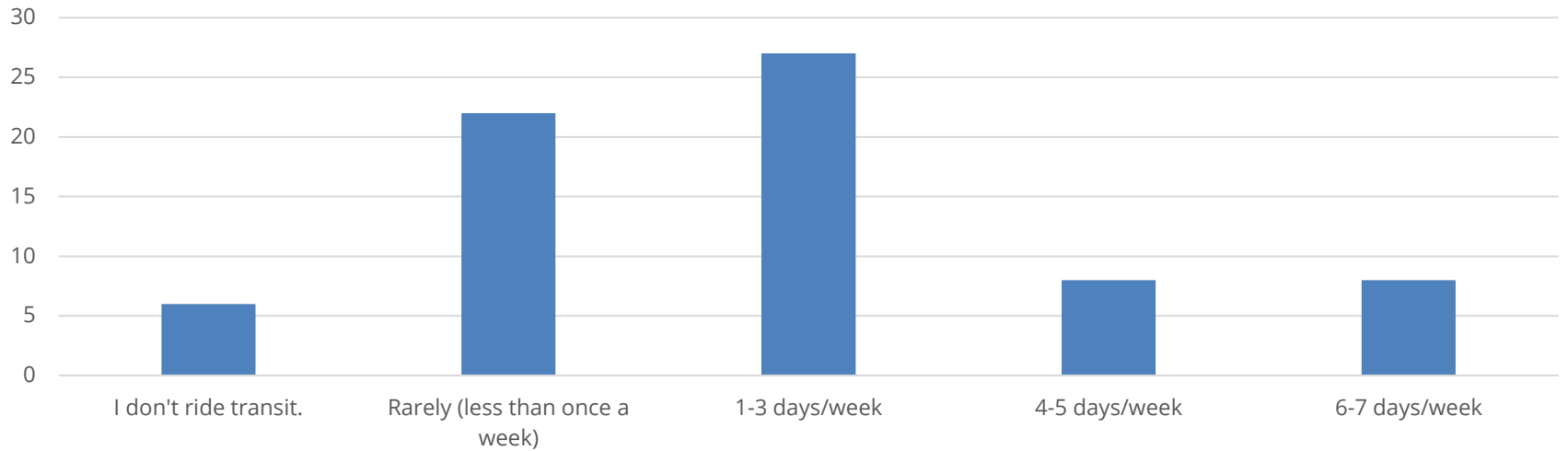
**Existing Rider Use**



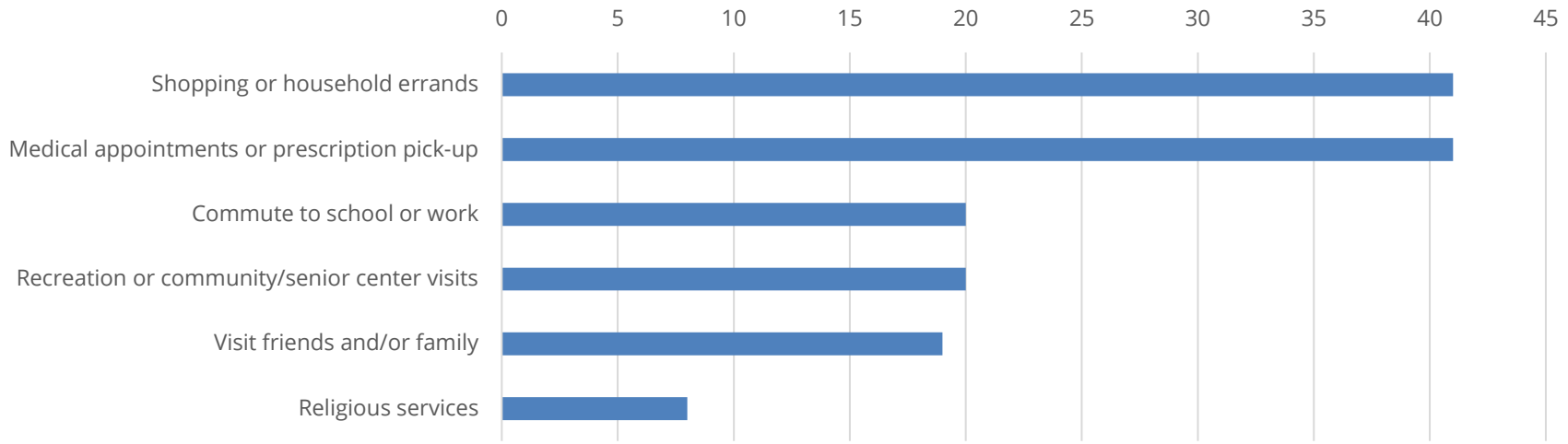
### What transit services do you use? Check all that apply.



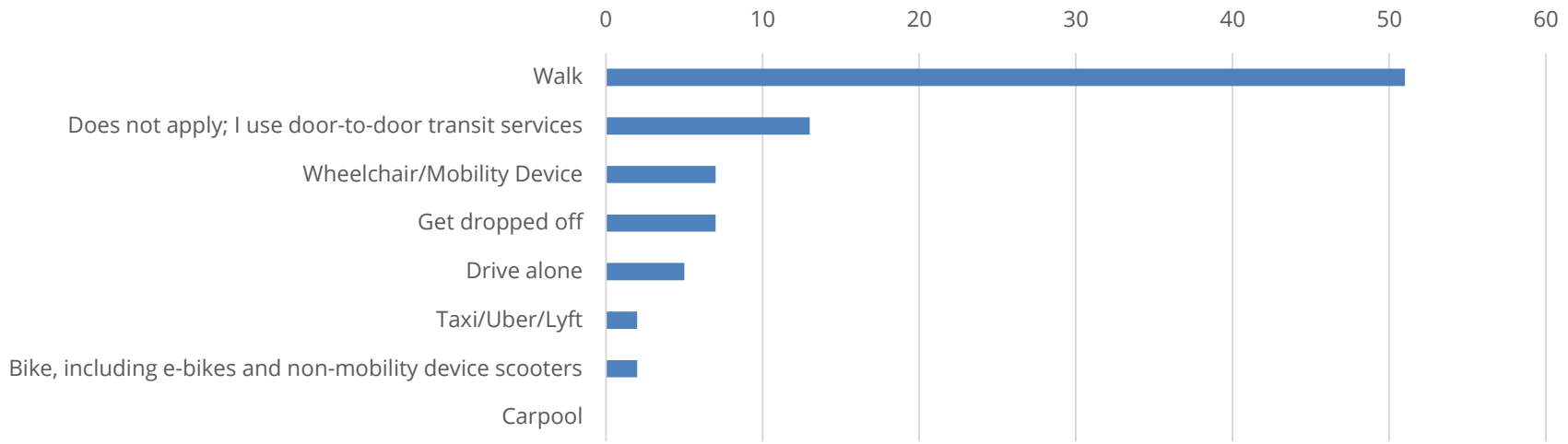
### How often do you use transit services?



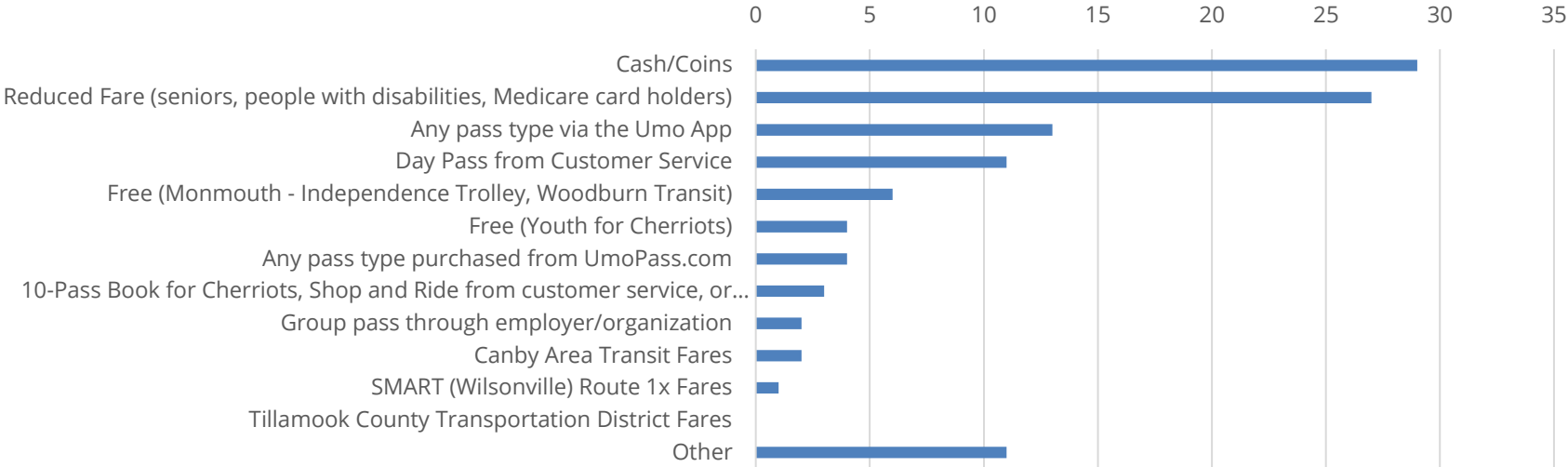
### What do you primarily use transit services for? Check all that apply



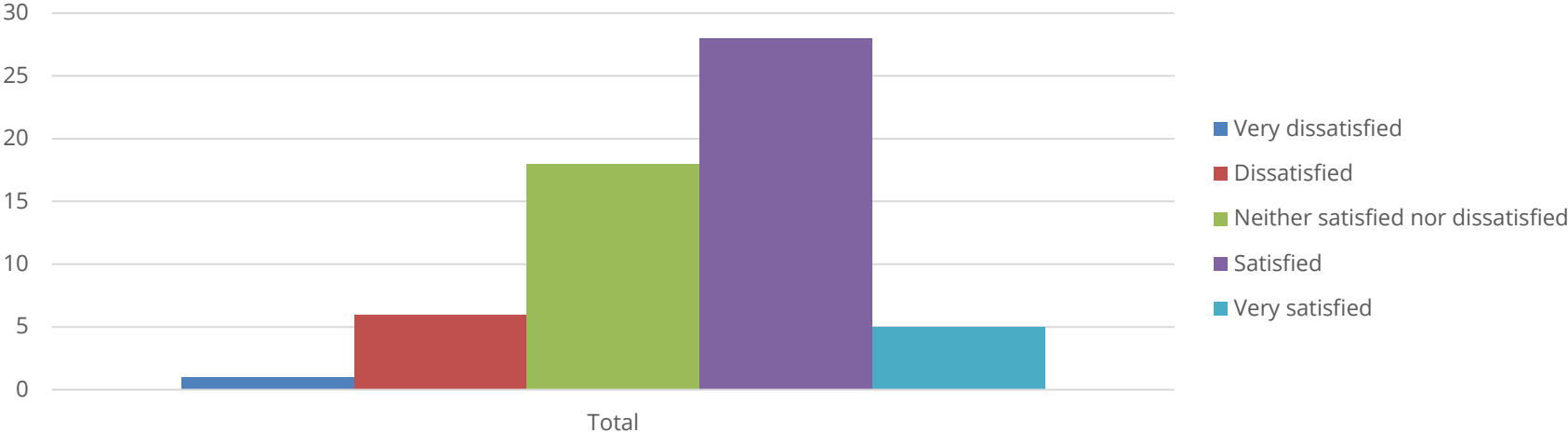
### How do you usually get to and from the bus stop? Check all that apply.



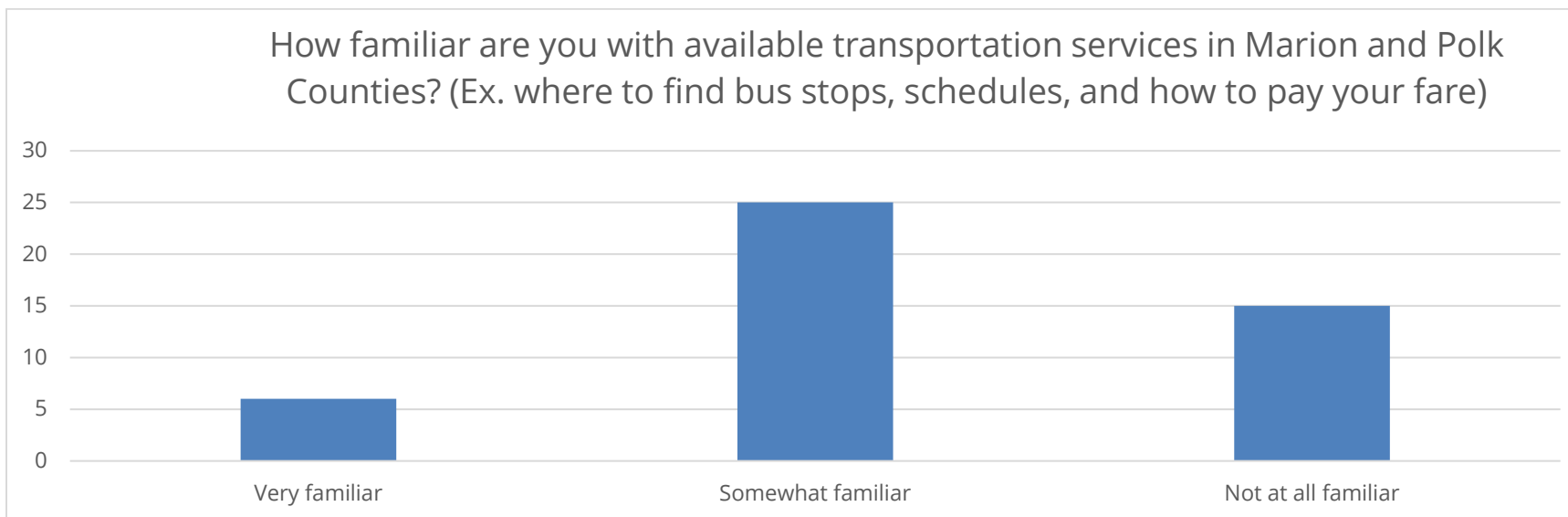
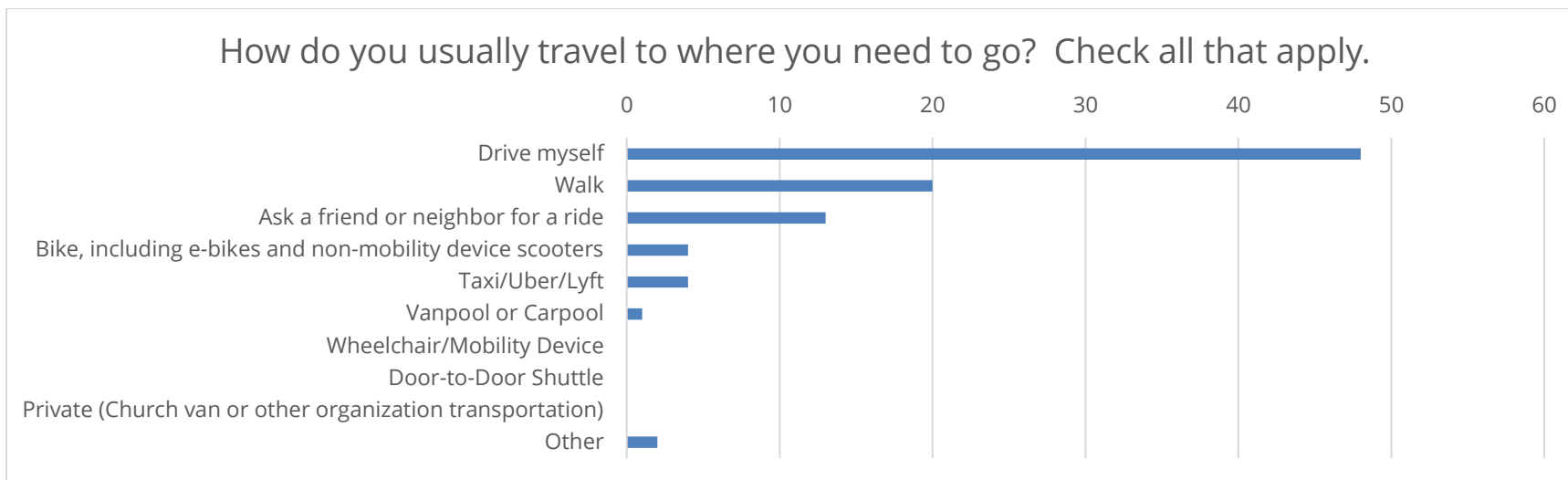
### What type of fare payment(s) do you use? Check all that apply.



### Overall, how satisfied are you with transit in Marion and Polk Counties?



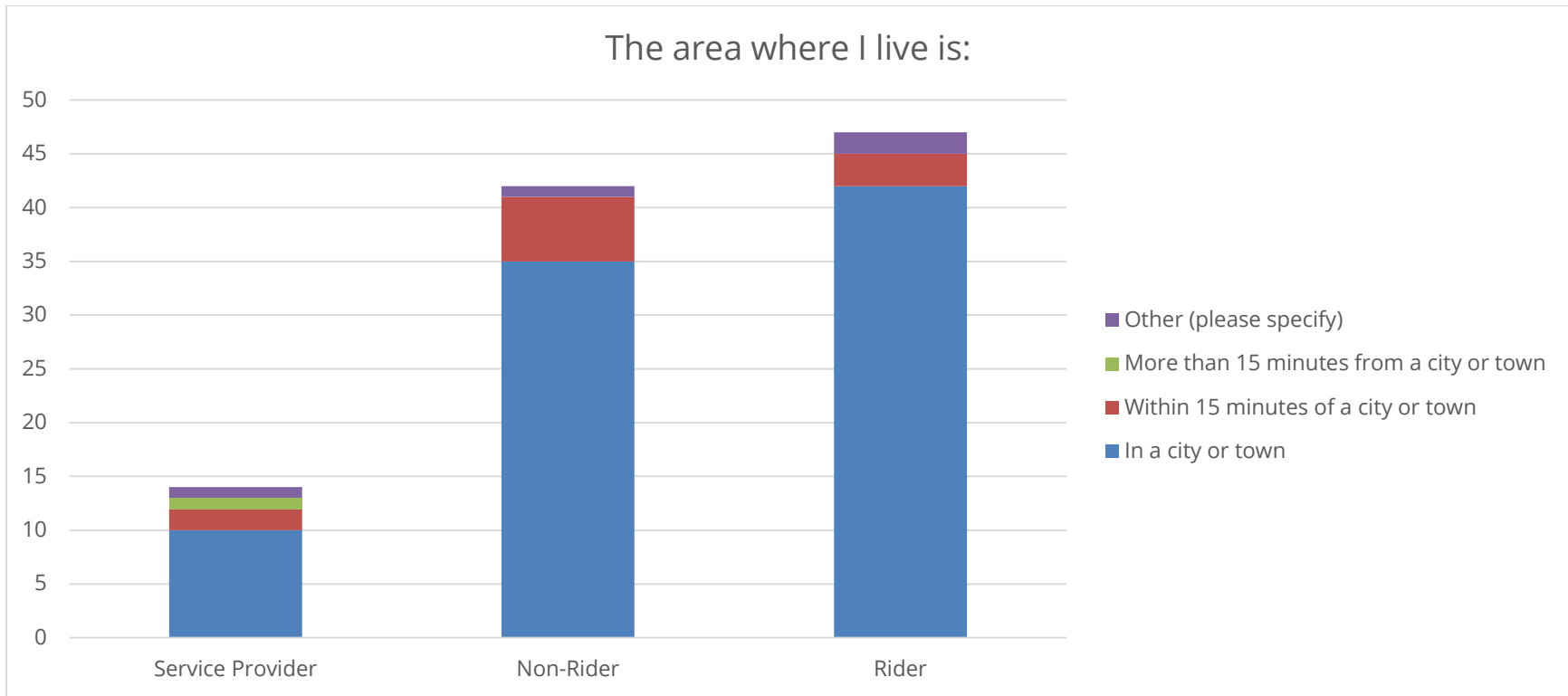
### Non-Rider Characteristics



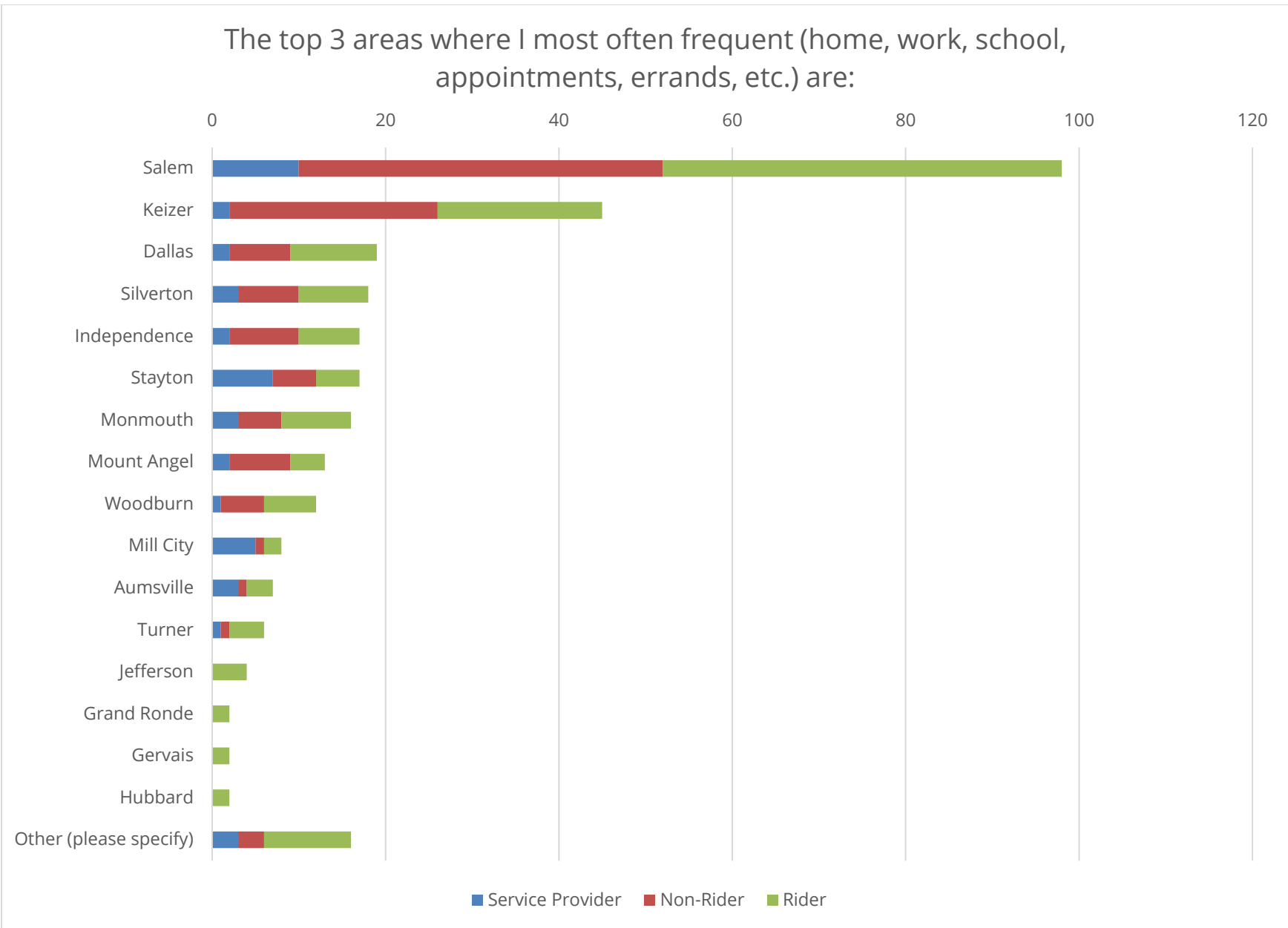


***Demographics and Other Information***

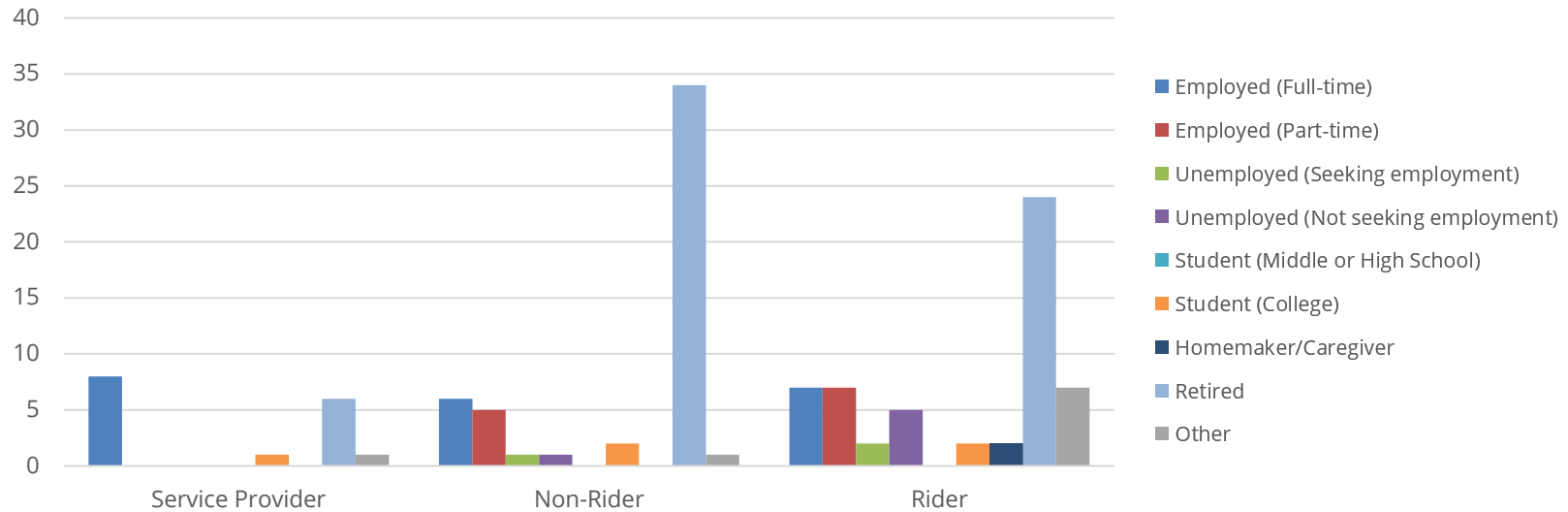
Home Location	Number of Participants
Dallas	2
Detroit	1
Falls City	1
Lake Oswego	1
Lyons/Fox Valley	1
Mehama	1
Mill City	2
Monmouth-Independence	9
Mt. Angel	1
Salem-Keizer	71
Silverton	10
Stayton	1
Wilsonville	1
Outside Oregon	2



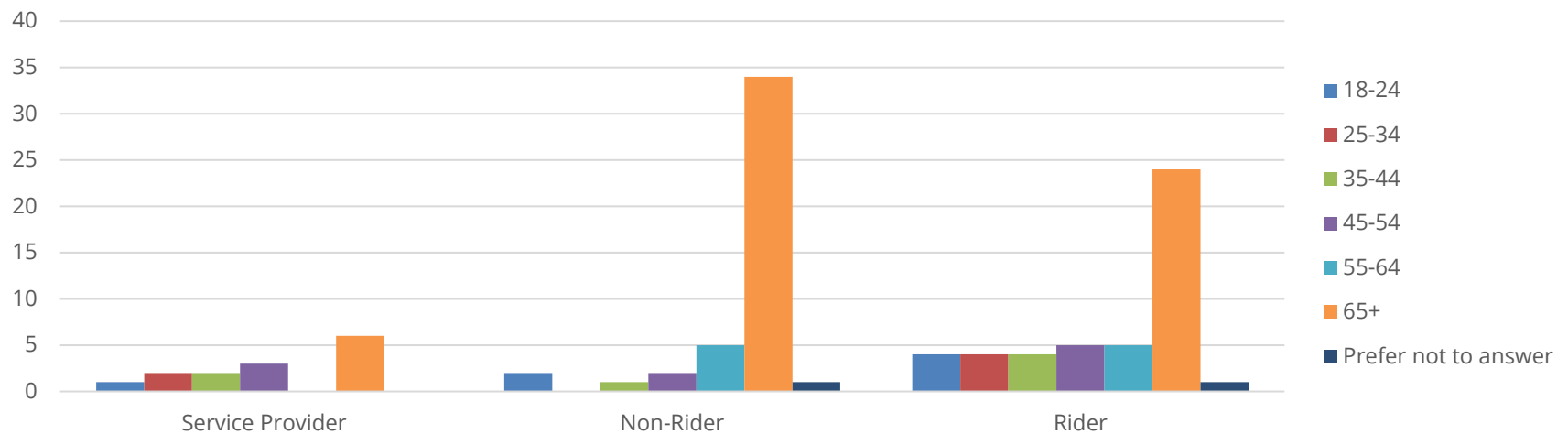
The top 3 areas where I most often frequent (home, work, school, appointments, errands, etc.) are:

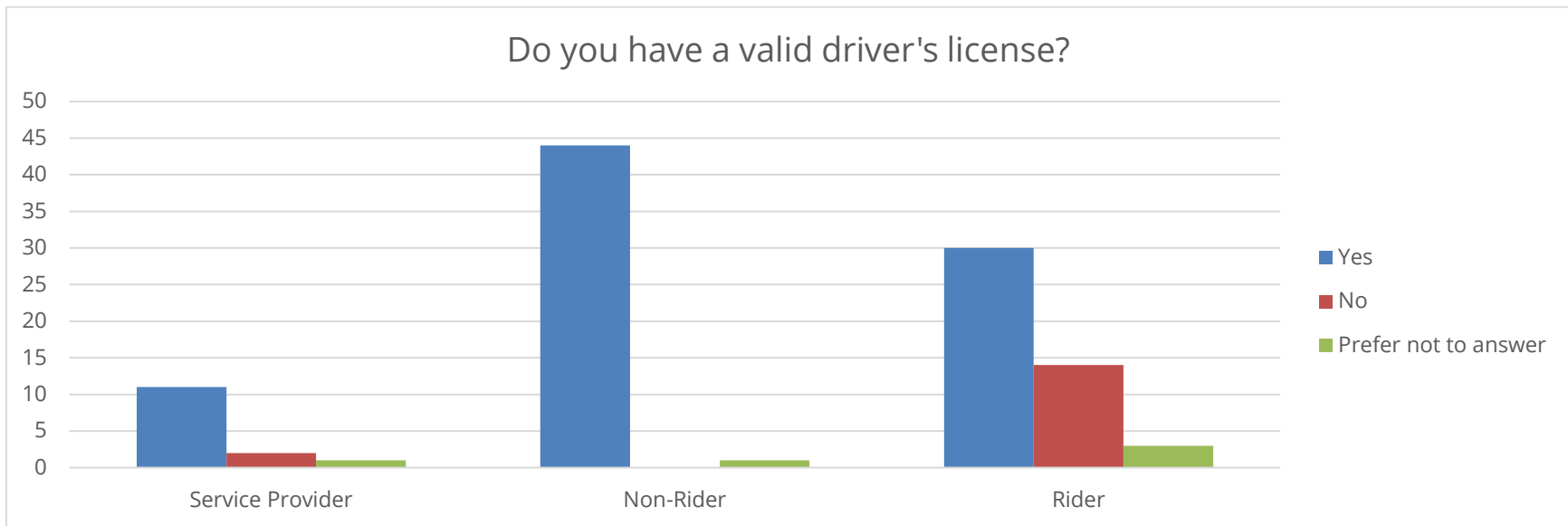
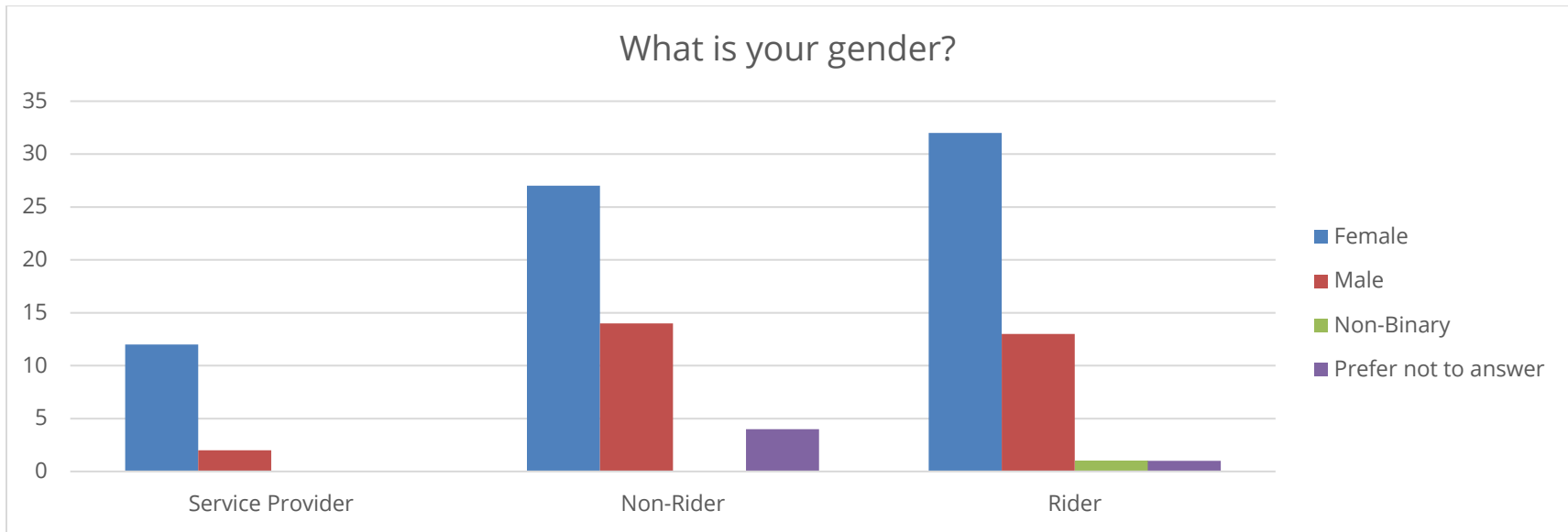


### Which of the following describe you? Check all that apply

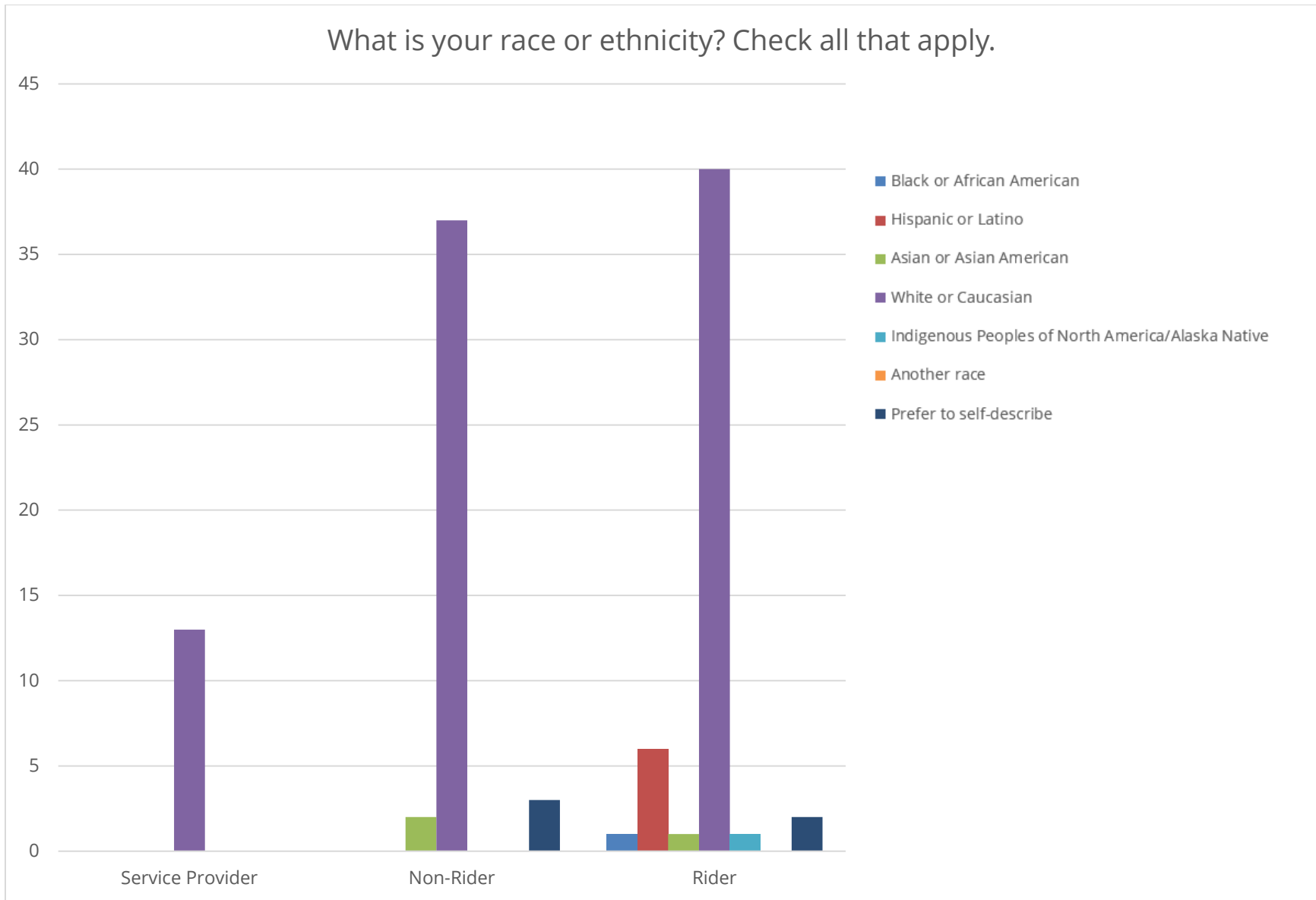


### What is your age range?

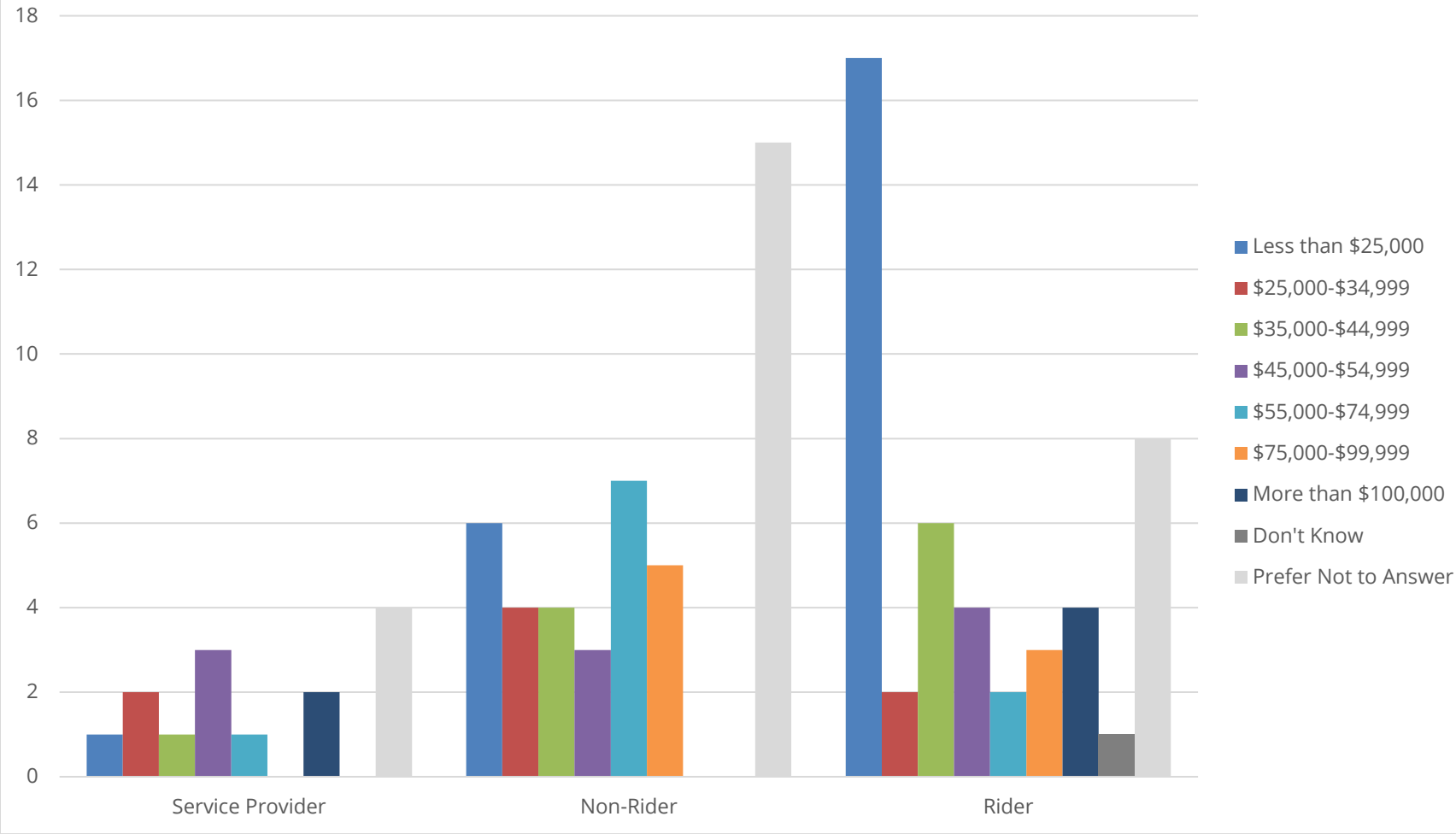




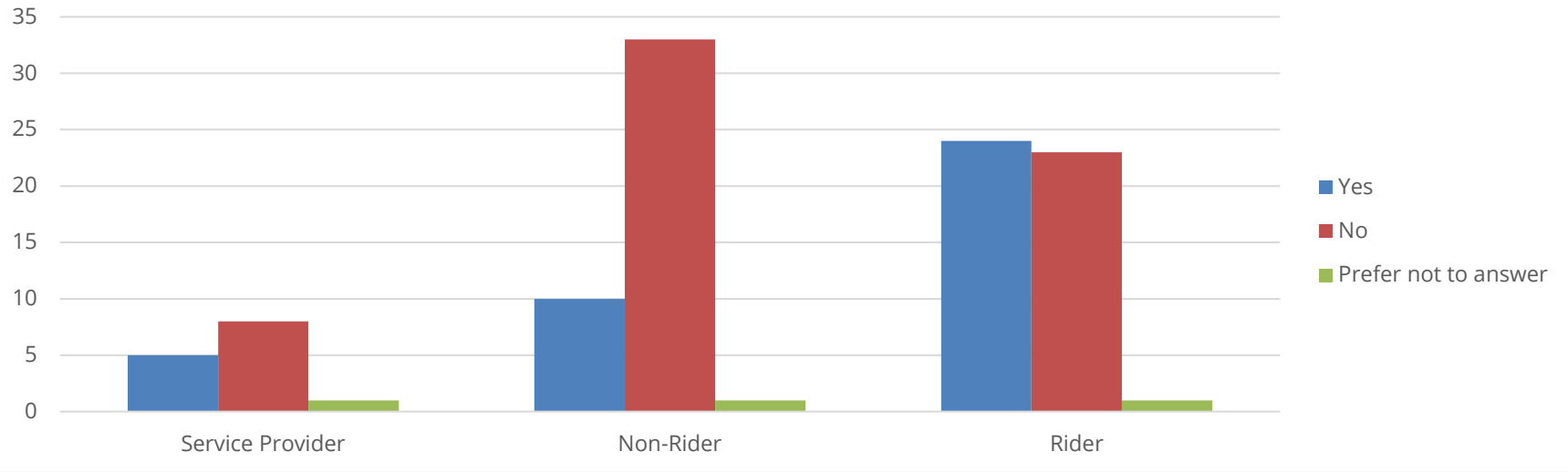
What is your race or ethnicity? Check all that apply.



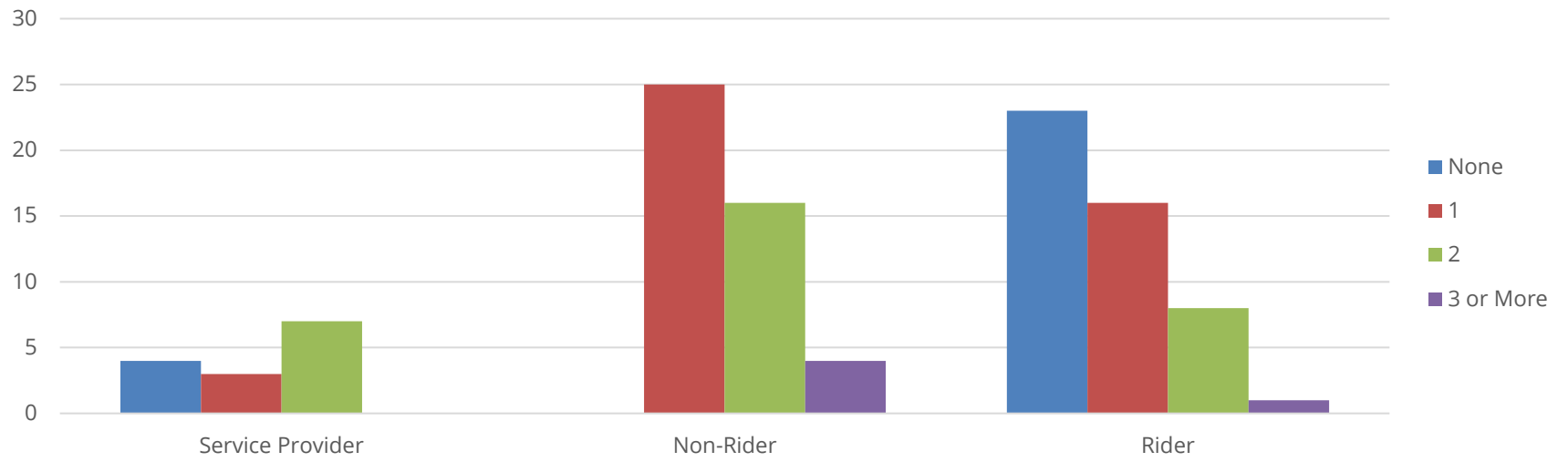
### What is your Individual income (before taxes) last year?



### Do you have a disability that affects your mobility?

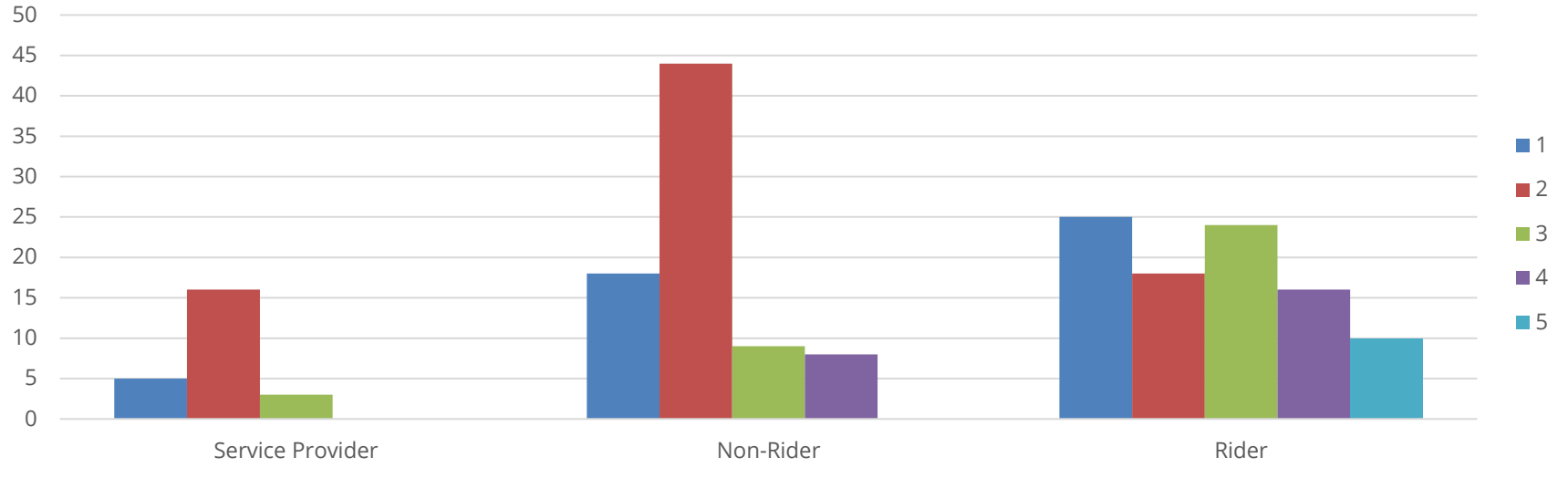


### How many working motor vehicles are available to your household?

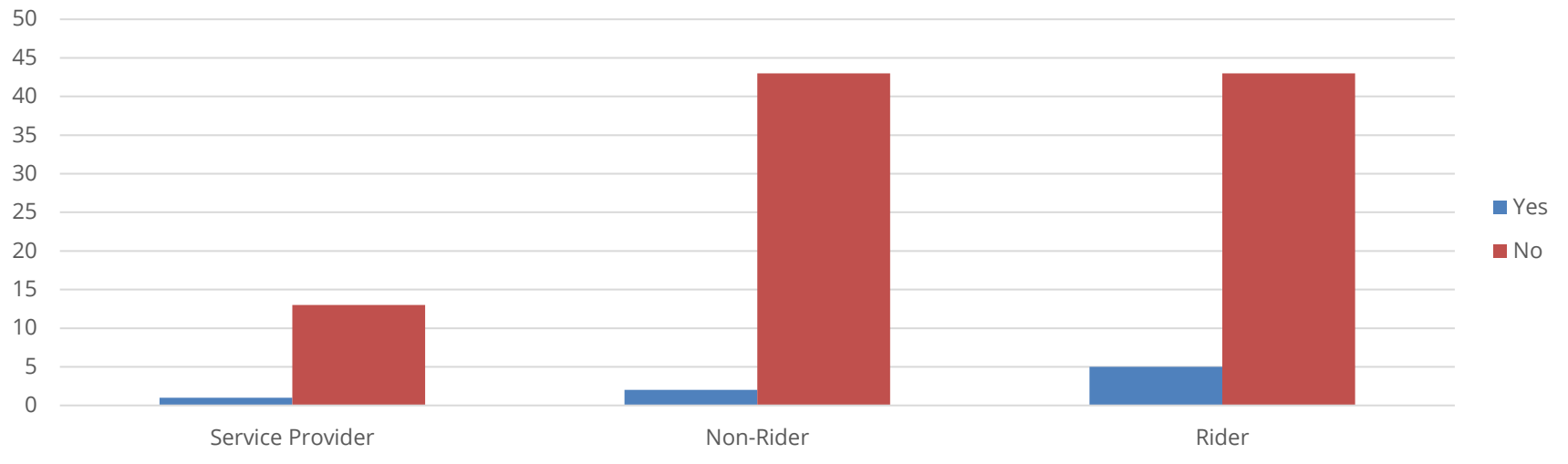




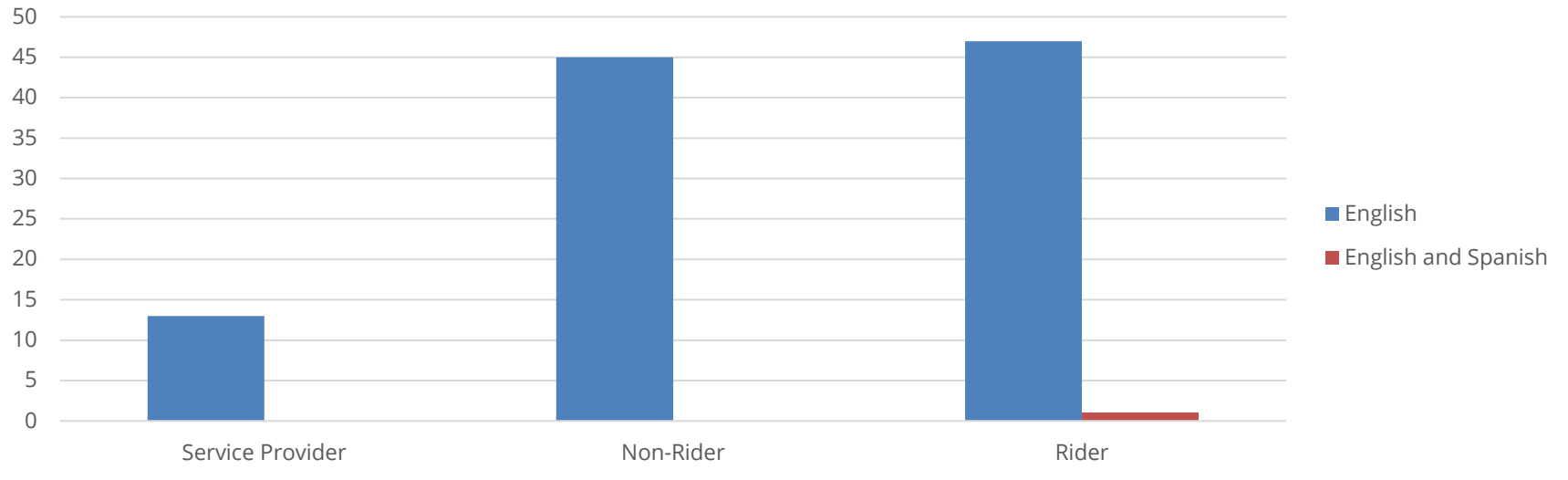
### How many people live in your household?



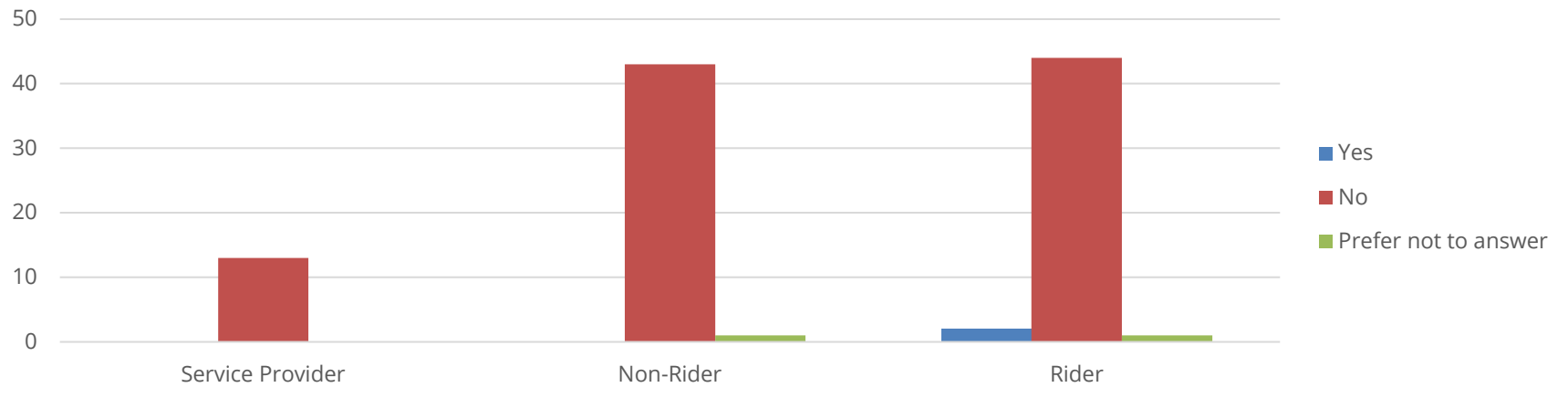
### Do you have children age 17 or younger living in your home?



### What language is primarily spoken in your home?



### Do you, or others in your household, have any difficulty speaking English to people for day-to-day activities such as shopping or taking the bus?



## APPENDIX B. MEMO #1 – FUNDING STREAMS

# Technical Memorandum

November 10, 2023

Project# 29131

To: Ted Stonecliffe, PMP, and Chris French  
Salem Area Mass Transit District  
555 County St NE, Suite 5230  
Salem, OR 97301

From: Susan Wright, PE, PMP, Krista Purser, PE, and Katie Popp, Kittelson and Associates

RE: 2024 Cherriots Coordinated Plan Update for Marion and Polk Counties

## CHERRIOTS FUNDING STREAMS

Cherriots Funding Streams .....	1
Introduction .....	1
Funding Sources .....	1
Consolidation of STF and STIF Funding.....	2
FTA Enhanced Mobility of Seniors & Individuals with Disabilities Program (§5310).....	5
Other Rural Funding.....	6
Cherriots Funding Allocation.....	6

### Introduction

This memorandum provides an overview of funding streams for Cherriots based on the funding cycles since the 2019 Coordinated Plan. It also addresses recent changes to public transit funding in Oregon and implications of those changes for Cherriots.

Cherriots administers several public transportation funding programs focused on service to seniors and people with disabilities in Marion and Polk Counties, including the Statewide Transportation Improvement Fund (STIF), which now includes the former State Special Transportation Fund (STF), and Federal Section §5310 Funds. Cherriots receives other funding related to urban transit systems and revenues from their Salem Area Mass Transit District (SAMTD) tax boundary.

Cherriots (SAMTD) is the qualified entity (QE) for determining how STIF and §5310 dollars are spent in the rural and urban areas of Marion and Polk Counties. The 2024 Cherriots Coordinated Plan Update for Marion and Polk Counties will be used as a guiding document for administering the FTA-direct §5310 grant (urban areas), the ODOT pass-through §5310 grant (rural areas), and STIF grant funds. It will also be used to coordinate transportation services with human service organizations and client-only services.

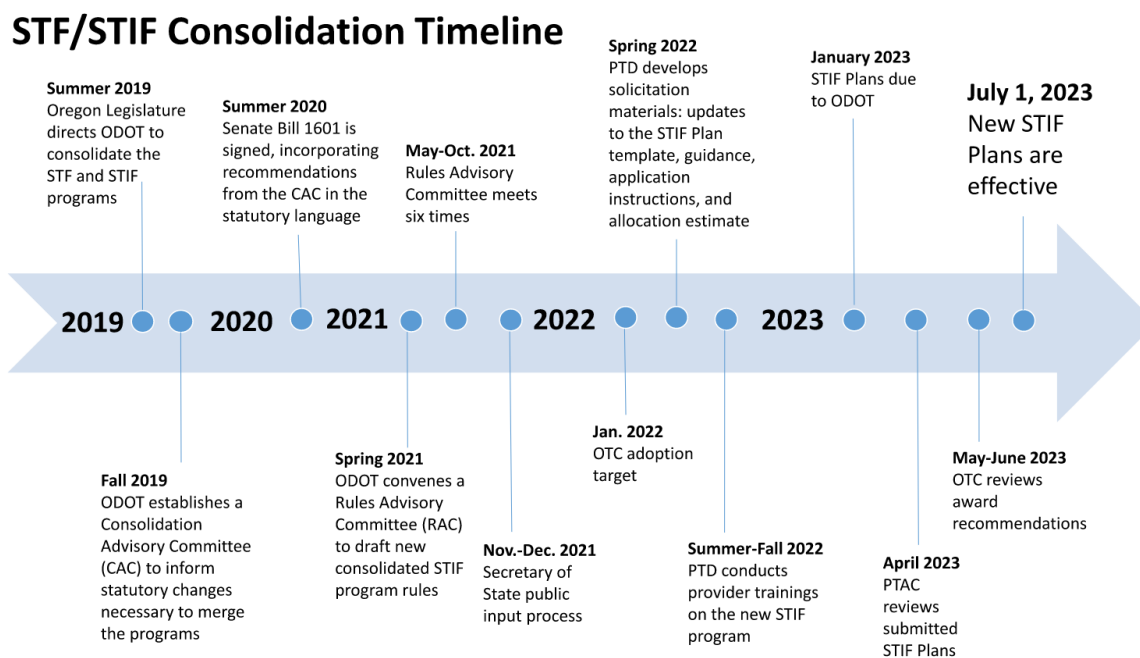
### Funding Sources

The 2024 Cherriots Coordinated Plan Update establishes guidance for the provision of funding streams for public transit services in Marion and Polk Counties. These funding sources are described in more detail below.

## Consolidation of STF and STIF Funding

In 2020, the Oregon Legislative Assembly passed Senate Bill 1601, directing the Oregon Department of Transportation (ODOT) to merge the Special Transportation Fund (STF) and Statewide Transportation Improvement Fund (STIF) into one public transit funding program. The purpose of this merger is to reduce redundancies, increase statewide and local administrative efficiency, and improve funding reliability for public transportation programs in Oregon while maintaining the objectives of both funding programs. ODOT's STF/ STIF timeline is shown in Figure 1.

Figure 1. ODOT STF/ STIF Consolidation Timeline



The following sections will discuss (1) the policies, rules, and provision of funding via the STIF and STF programs before the consolidation took effect in July 2023 and (2) the new consolidated STIF program and its implications for Cherriots.

## Statewide Transportation Improvement Fund (STIF)

The Statewide Transportation Improvement Fund (STIF) was established to provide a dedicated source of funding for public transportation services for all users in Oregon. STIF funding may be used for public transportation purposes that support the planning, operation, and administration of public transportation programs. The grants are administered by the ODOT Rail and Public Transit Division and can be used as a local match for state and federal grants. As the designated STIF Qualified Entity (QE), Cherriots can distribute federal and state funds to itself and to eligible subrecipients to support transportation services that enhance mobility for seniors and persons with disabilities.

STIF funding is allocated across four programs:

- 90% of STIF funds are allocated by formula and distributed to Qualified Entities (SAMTD district boundary and out-of-district Marion and Polk Counties via Cherriots)
- 5% of STIF funds are available via discretionary grants for flexible funding.

- 4% of funds are available via discretionary grants for projects enhancing intercommunity services and the statewide transit network
- 1% of the funds are allocated for program administration and a technical resource center

STIF formula funds were historically distributed based on employee payroll taxes, meaning that urban areas with high labor density generally receive larger funding disbursements roughly equivalent to the taxes generated from the area.

## Special Transportation Fund (STF)

The STF historically provided funding for transportation services for seniors and people with disabilities to access health, education, work, social, and recreational opportunities so that seniors and people with disabilities may live as independently and productively as possible. STF funds could also be used for client-only services and other programs enhancing the mobility of low-income individuals.

Coordinated Plans served as the “STF Plan” that guided the use of STF funds in the Cherriots STF region (Marion and Polk Counties). Cherriots was the designated “STF Agency” to distribute (1) STF funds from the state for Marion and Polk Counties and (2) pass-through funds from ODOT to non-profit agencies in Marion and Polk Counties. The elements of the STF Plan were mandated by Oregon Administrative Rule (OAR) (Chapter 732). The plan was required to include the following plan elements:

- Evaluation of community's resources
- Assessment of transportation needs for people with low income, seniors, and people with disabilities
- Strategies and/or activities to address the identified gaps, and that also address efficiencies in service delivery through coordination; and
- Relative priorities of the strategies

Before the STF and STIF consolidation, STF funding was allocated across two programs:

- 75% of STF funds are allocated by formula and distributed to designated STF Agencies (Marion and Polk Counties via Cherriots)
- 25% of STF funds are allocated to a discretionary fund after formula requirements have been met

Funds were distributed to STF agencies using a population-based method or via an established minimum allocation set by the Oregon Transportation Commission (OTC). Each STF Agency received either the population-based allocation or the minimum allocation, whichever was higher.

## Consolidated STIF Program

Cherriots is awarded funding from ODOT's STIF, which STF is now combined into, on a biennial basis. The consolidation of STF into the STIF program took effect on July 1, 2023. The objective of the consolidation is to reduce redundancy, increase administrative efficiency, and improve funding reliability for public transportation providers in Oregon. The resulting rule change also expanded the representation groups for STIF advisory committees to include veterans and black, indigenous, and people of color community members.

Both the STF and STIF formulas are still active in the new STIF program funding allocation. To maintain the fundamentals of STF programming, the consolidated STIF will be used to “backfill” STF Formula Funds which will be distributed to Qualified Entities by a population-based formula to support transit services for seniors and people with disabilities. The minimum base for the backfilled STF funds is fixed at the 2019-2021 levels and will be adjusted over time based on the rate of change of the consolidated STIF. STIF consolidated

fund grew by 15.91% between the 2019-2021 biennium and 2023-2025 biennium estimates, an approximately \$37 million increase.

The remainder of STIF funding after backfilling the fixed 2019-2021 STF funds will be distributed to Qualified Entities by the payroll-based formula consistent with prior STIF distribution, as follows:

- 90% by formula
- 5% by discretionary competitive process
- 4% by intercommunity discretionary competitive process
- 1% to ODOT for a Technical Resource Center (TRC) to assist transit providers in rural areas with training, planning, and technology

STIF plan requirements were also updated to incorporate fundamental elements of the STF program, including that funding may be used for:

- Supporting client-only projects where those projects are included in a planned and coordinated community transportation program, and
- Implementation of programs that enhance services for older adults and people with disabilities.

Figure 2 summarizes the consolidated fund allocation framework. Elements noted with an asterisk and highlighted in orange represent historic Special Transportation Fund revenue sources and allocations. ODOT's projected STIF allocation estimates for SAMTD (Cherriots) are summarized in Table 1.

Figure 2. Consolidated Statewide Transportation Improvement Fund Revenue and Allocation Framework<sup>1</sup>

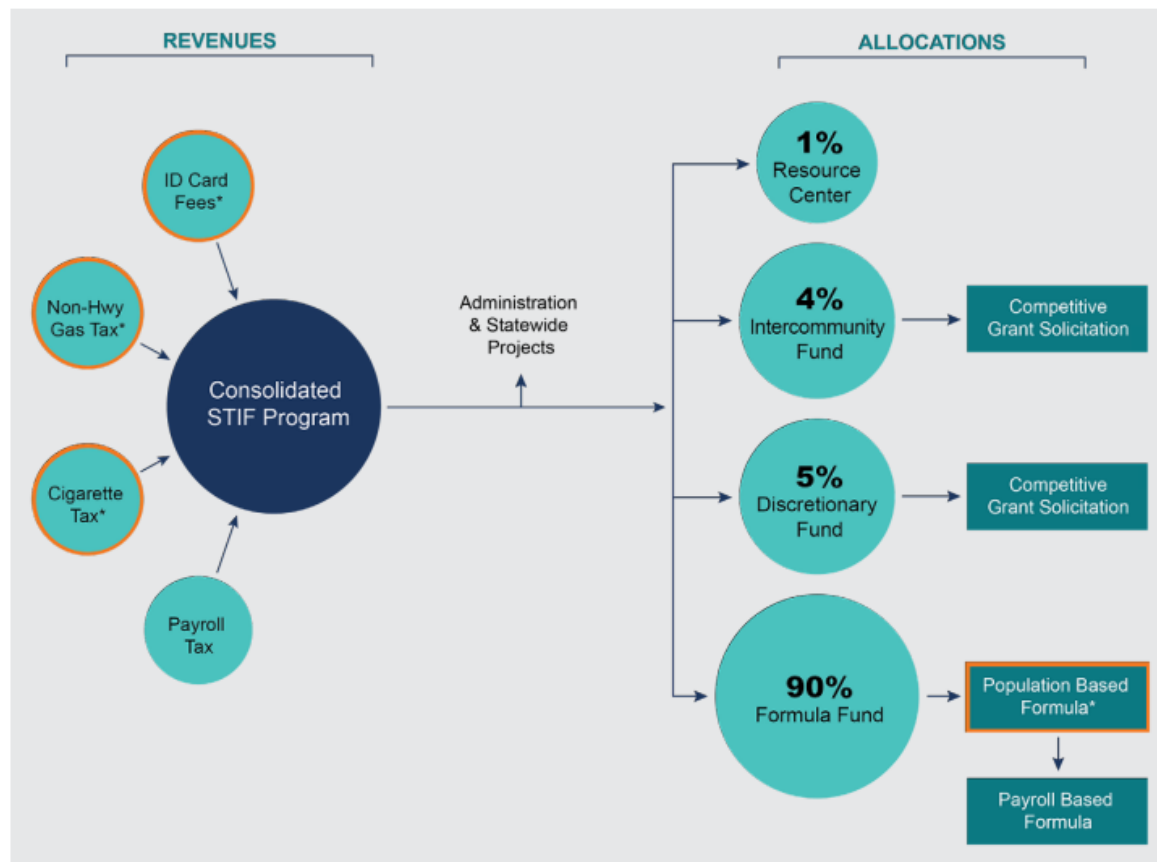


Table 1. ODOT STIF Allocation Estimate<sup>2</sup>

Base Allocation	FY2024	FY2025	FY 2026	FY 2027
Program Totals (Population + Payroll)				
In district	\$6,786,415	\$7,134,154	\$7,456,775	\$7,808,558
Out of district Marion County	\$2,357,286	\$2,479,288	\$2,590,188	\$2,713,618
Out of district Polk County	\$817,581	\$860,348	\$898,378	\$941,649
<b>SAMTD (Total)</b>	<b>\$9,961,283</b>	<b>\$10,473,790</b>	<b>\$10,985,341</b>	<b>\$11,463,825</b>

## FTA Enhanced Mobility of Seniors & Individuals with Disabilities Program (§5310)

The Federal Transit Administration (FTA) Enhanced Mobility of Seniors and Individuals with Disabilities (§5310) is a program that provides formula funds to designated recipients to improve mobility for seniors and individuals with disabilities by expanding transportation mobility options. Cheriots is the designated recipient of Federal Transit Administration (FTA)-direct §5310 funds for Marion and Polk Counties and ODOT pass-through §5310 funds for non-profit organizations. As a recipient of §5310 funds, Cheriots must develop

<sup>1</sup> ODOT, (2021). *ODOT Statewide Transportation Improvement Fund Program: A Report to the Joint Committee on Transportation.*

<sup>2</sup> ODOT, (2022). *Statewide Transportation Improvement Fund Allocation Estimate, Corrected Sept. 16, 2022.*



a Coordinated Plan and update it every 4 to 5 years to meet federal and state requirements. The 2024 Cherriots Coordinated Plan Update for Marion and Polk Counties will serve as the document that meets this requirement.

## Other Rural Funding

Other funds that support rural services that help meet the needs of seniors and people with disabilities include:

- FTA Formula Grants for Rural Areas Program (§5311): Cherriots receives rural area formula grants for their regional transit services. Funds are administered by ODOT, with each subrecipient receiving a \$100,000 base and a proportional formula based on rural service miles and ridership. Funding allocation aims to provide subrecipients with a minimum of 95 percent and a maximum of 110 percent of the previous biennium's allocation.
- CARES 5310: Cherriots was a recipient of fiscal year 2021 American Rescue Plan (ARP) Act §5310 (FTA) funds to use for public transportation projects serving seniors and individuals with disabilities within the Salem-Keizer UGB. The ARP §5310 funds could only be used for expenses incurred during the COVID-19 pandemic.

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## Cherriots Funding Allocation

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Table 2 and Exhibit 1 summarize funding amounts from each source for the most recent funding cycles, with several 2023 funds not yet complete for the calendar year. Additionally, 2019 represents a partial collection of STIF tax dollars and thus substantially lower funding than subsequent years. 2020 STIF funding represents the first full year of STIF revenue.

Total STF funding saw relatively slow growth in recent years, growing at roughly <1% linear growth rate each year. However, STIF significantly increased transit funding, and continues to do so as it grows by a 7% linear growth rate each year<sup>3</sup>.

As Section 5310 grant payments are made based on reimbursement of services provided, and services were substantially reduced during the COVID-19 pandemic, Section 5310 funding decreased by approximately 50% in 2020. Since 2020. However, Section 5310 funding has returned to pre-pandemic levels and funding overall has generally grown by 5-10% per year.

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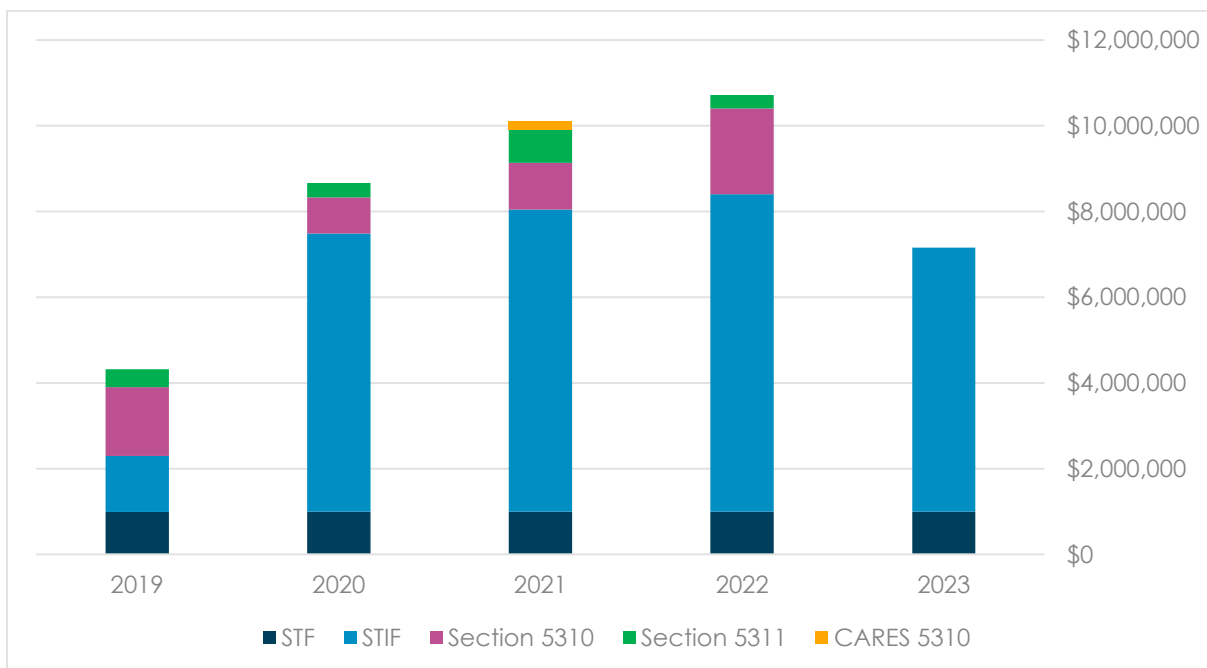
<sup>3</sup> Based on average linear growth between 2020-2021 and 2021-2022. Fiscal years 2019 and 2023 only include partial funding.

**Table 2. Summary of Cherriots Funding, 2019 to 2023**

Source	2019	2020	2021	2022	2023
STF (in-district) <sup>1</sup>	\$744,949	\$740,597	\$740,597	\$392,696	\$392,695
STF (out-of-district, to Cherriots) <sup>1</sup>	\$0	\$0	\$0	\$346,465	\$346,465
STF (out-of-district, to subrecipients) <sup>1</sup>	\$244,000	\$254,765	\$254,765	\$256,648	\$256,648
Section 5310	\$1,609,931	\$837,479	\$1,084,244	\$2,003,797	TBD
Section 5311	\$416,831	\$341,912	\$781,130	\$315,123	TBD
STIF (in-district)	\$1,030,717	\$5,683,944	\$5,715,688	\$6,032,854	\$5,009,207
STIF (out-of-district, to Cherriots)	\$100,000	\$380,500	\$499,801	\$959,122	\$795,730
STIF (out-of-district, to subrecipients)	\$175,000	\$429,233	\$837,066	\$413,322	\$353,125
CARES 5311	\$0	\$0	\$190,906	\$0	\$0
<b>Yearly Total</b>	<b>\$4,321,428</b>	<b>\$8,668,430</b>	<b>\$10,104,197</b>	<b>\$10,720,026</b>	<b>\$7,153,871</b>

<sup>1</sup> For 2020-2023, the biennial awards were divided by 2 to estimate yearly amounts. Biennial awards are released from July 1 through June 30, the state's fiscal year timeframe. The amounts here represent the equivalent fiscal year distribution (ex. 2023's \$392,695 was distributed from 7/1/22-6/30/23).

**Exhibit 1. Summary of Cherriots Funding, 2019 to 2023**



# APPENDIX C. MEMO #2 – DEMOGRAPHICS AND TRANSIT MARKETS

# Technical Memorandum

September 4, 2023

Project# 29131

To: Ted Stonecliffe, PMP, and Chris French  
Salem Area Mass Transit District  
555 County St NE, Suite 5230  
Salem, OR 97301

From: Susan Wright, PE, PMP, Krista Purser, PE, and Katie Popp, Kittelson and Associates

RE: Cherriots 2024 Coordinated Plan Update for Marion and Polk Counties

## DEMOGRAPHICS AND TRANSIT MARKETS

This memorandum provides an overview of demographics and transit markets for Marion and Polk counties in support of the Cherriots 2024 Coordinated Plan Update. Data is sourced from the 2020 United States Census and the 2017-2021 American Community Survey (ACS) five-year estimate. Analyzing the demographic distributions and needs of Marion and Polk counties is vital to evaluating the quality of a transit system and identifying geographic locations of primary transit markets.

This review discusses the considerations of needs for transit dependent populations in Marion and Polk counties, many of whom are low-income individuals, seniors, and people with disabilities. Understanding the needs of transit dependent populations requires more consideration to specific demographic populations beyond typical transit planning metrics such as population density and employment density. The following outlines eight demographic groups typically associated with higher use of transit:

- **People with Disabilities** – people with a disability often have difficulty operating a vehicle and require access to public transportation.
- **Seniors (Age 65 and Over)** – individuals aged 65 and older may become less comfortable driving as they age or have limited physical ability to drive.
- **Youth (Under 18)** – individuals under 18 years old have limited access or ability to drive a vehicle.
- **People Experiencing Poverty** – individuals who live within a set of income thresholds established by the US Census Bureau, which vary by family size and composition. Low-income households tend to rely on public transportation as it is less expensive than owning and operating a vehicle.
- **People of a Racial/Ethnic Minority** – often live in neighborhoods that have suffered systemic disinvestment and other barriers to transportation.
- **Zero Vehicle Households** – persons residing in households without access to a vehicle typically rely on walking, biking, public transportation, or carpooling to meet their mobility needs.
- **Limited English Proficiency Households** – limited English proficiency (LEP) can be a barrier for interacting with the transportation system, particularly in terms of owning and operating a vehicle. Typically, households with low English proficiency rely on other modes to meet their mobility needs.

- **Veterans** - have devoted years of their lives into their respective field of expertise, with many impacted by limited mobility and high medical needs.
- **Multi-Unit Dwellings** – many of the above demographic groups may live in multi-unit dwellings, including special care facilities for seniors and/or people with disabilities.

Title VI of the Civil Rights Act of 1964 prohibits discrimination in the provision of federally supported benefits and services, including public transportation service. In addition to Title VI populations, this analysis provides information regarding populations who are typically more reliant on transit or have been historically underrepresented in planning processes. These metrics are summarized for Marion and Polk counties in Table 1.

Values higher than the state average are in **bold**. As shown, Marion and Polk counties have high percentages of people with a disability, seniors (age 65 and over), youth (age under 18), people below the poverty line, racial/ethnic minorities, people with limited English proficiency (LEP), and veterans. Salem and Keizer have patterns consistent with the county demographics.

**Table 1. Transit Dependent Populations**

	Total Population (2020 Census)	Total Population (ACS)	Total Households (ACS)	People with a Disability	Seniors (65 and older)	Youth (Under 18)	Below 100% Poverty	Below 200% Poverty	Racial/Ethnic Minority	Zero Vehicle Households	People with LEP	Veteran
<b>Oregon</b>	4,237,256	4,128,333	1,658,091	12.1%	28.7%	14.4%	20.7%	17.8%	25.8%	7.1%	2.3%	8.0%
<b>Marion and Polk Counties</b>	433,353	334,636	121,132	<b>13.1%</b>	<b>33.3%</b>	<b>14.9%</b>	<b>24.2%</b>	16.2%	<b>33.9%</b>	<b>7.4%</b>	<b>3.3%</b>	7.6%
<b>Salem-Keizer</b>	214,911	205,085	78,450	<b>13.9%</b>	<b>33.8%</b>	<b>15.3%</b>	<b>24.8%</b>	14.7%	<b>33.7%</b>	<b>7.2%</b>	<b>3.0%</b>	6.9%

## Demographic Profile of Marion and Polk Counties

This section provides an overview of general population/employment and specific population demographics associated with transit dependent populations.

The following figure sets show where transit-dependent populations live throughout Marion and Polk counties. Data is taken at the most refined level available (typically block group, with some census-tract). Areas are shaded by the density or percentage of the population/households within that demographic, and labeled with the number of people/households within that demographic. Shading represents approximate quartiles, with 25% of the least dense block groups/census tracts in the lightest shade, up to the 25% most dense block groups/census tracts in the darkest shade. Each "figure" includes smaller-scale maps for major urban areas with refined block groups/census tracts.

## Population and Employment Density

Population density and employment density of Marion and Polk counties are illustrated in Figure 1 and Figure 2, respectively. The areas of highest population and employment density may not align with concentrations of specific demographic populations associated with transit dependent populations. However, they support identification of transit market needs.

Overall, areas of high population density generally share the same patterns as areas with high employment density. As expected, the Salem-Keizer area generally has the highest population and employment density in Marion and Polk Counties followed by the other urban areas. The Salem-Keizer Urban Growth Boundary (UGB) is the most densely populated in the eastern area of the UGB within the vicinity of the I-5 corridor. Employment density trends of Salem-Keizer, Dallas, Woodburn, Monmouth, and Stayton UGBs tend to follow patterns consistent with population density of those areas.

## People with Disabilities

Figure 3 illustrates a population density map showing areas with high percentages of individuals with disabilities. These areas include:

- Northeastern part of Polk County
- Parts of Woodburn, Dallas, Lyons, and Mill City UGBs

## Seniors

Figure 4 illustrates a population density map showing areas with high percentages of people aged 65 and older in Marion and Polk counties. These areas include:

- Southeastern area of Polk County
- Area surrounding Salem UGB to the west and south
- Sublimity UGB
- Parts of Dallas and Woodburn UGBs

## Youth

Figure 5 illustrates a population density map showing areas with high percentages of youth (under 18 years old). These areas include:

- Central and southern parts of Marion County
- Gervais UGB
- Parts of Woodburn, Monmouth, Independence, Silverton, and Jefferson UGBs

## People Experiencing Poverty

The federal poverty level is defined by the US Census based on household size. The 2023 federal poverty level for a family of 4 is defined as \$30,000 of income. 200% poverty level for a family of 4 is \$60,000. The state of Oregon uses 200% poverty level for Statewide Transportation Improvement Fund (STIF) criteria. Figure 6 and Figure 7 illustrate a population density map

showing areas with high percentages of people living below the 200% and 100% poverty level, respectively.

Areas of high concentrations of people living below 100% poverty exist in the following areas:

- Northeastern part of Polk County
- Salem core area
- Parts of Woodburn, Monmouth, and Dallas UGB

Areas of high concentrations of people living below 200% poverty exist in the following areas:

- Central-astern area of Marion County
- Salem core area
- Parts of Woodburn, Stayton, and Falls City UGBs

## People of a Racial/Ethnic Minority

Figure 8 illustrates a population density map showing areas with high percentages of people aged 65 and older in Marion and Polk counties. These areas include:

- Northern and southern areas of Marion County
- Northeastern area of Salem-Keizer UGB
- Woodburn UGB
- Parts of Monmouth and Stayton UGBs

## Zero Vehicle Households

Figure 9 illustrates a household density map showing areas with high percentages of zero vehicle households. These areas include:

- Parts of Woodburn, Mt. Angel, and Dallas UGBs
- Central area of Salem-Keizer UGB along the I-5 corridor, in the downtown area, and along Salem Dallas Hwy

## Limited English Proficiency Households

Figure 10 illustrates a household density map showing areas with high percentages of households with Limited English Proficiency (LEP). These areas include:

- Northeastern part of Polk County
- Areas in Woodburn UGB and the surrounding area to the east
- Part of the core area of Salem UGB

## Veterans

Figure 11 illustrates a population density map showing areas with high percentages of households with Limited English Proficiency (LEP). These areas include:

- Eastern and northern parts of Marion County
- Eastern part of Polk County

- Area surrounding Salem UGB to the south
- Area in Woodburn UGB

## Multi-Unit Households

Figure 12 illustrates a population density map showing areas with high percentages of households with 2 or more units. These areas include:

- Areas in the Salem downtown core, adjacent to I-5 to the east, and along OR221
- Areas in Woodburn, Dallas, and Monmouth UGBs
- Area surrounding Monmouth and Independence UGBs to the north

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## Cherriots Origin-to-Destination Services

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Cherriots LIFT is a shared-use paratransit service that offers origin-to-destination transportation to eligible individuals whose qualifying disabilities prevent them from using the Cherriots Local bus services. The service area for LIFT is all areas in the Salem/ Keizer UGB within  $\frac{3}{4}$  mile of Cherriots Local routes. The service area captures most of the UGB except for a few areas that are primarily industrial or low-density residential areas. Eligible participants can schedule a ride with LIFT Monday through Friday starting at 8am with final drop-offs by 5pm.

Origins and destinations for Cherriots LIFT service from May 1 to May 31, 2023 are shown with population density of individuals with disabilities in Figure 13 and senior population in Figure 14. Most of the origins and destinations overlap, indicating two-way trips. Within the May 2023 period, there were 6,946 LIFT trips. There are several areas with high concentrations of LIFT origins and destinations, including:

- Lancaster Drive
- River Road
- Commercial Street
- Center Street
- Downtown core area

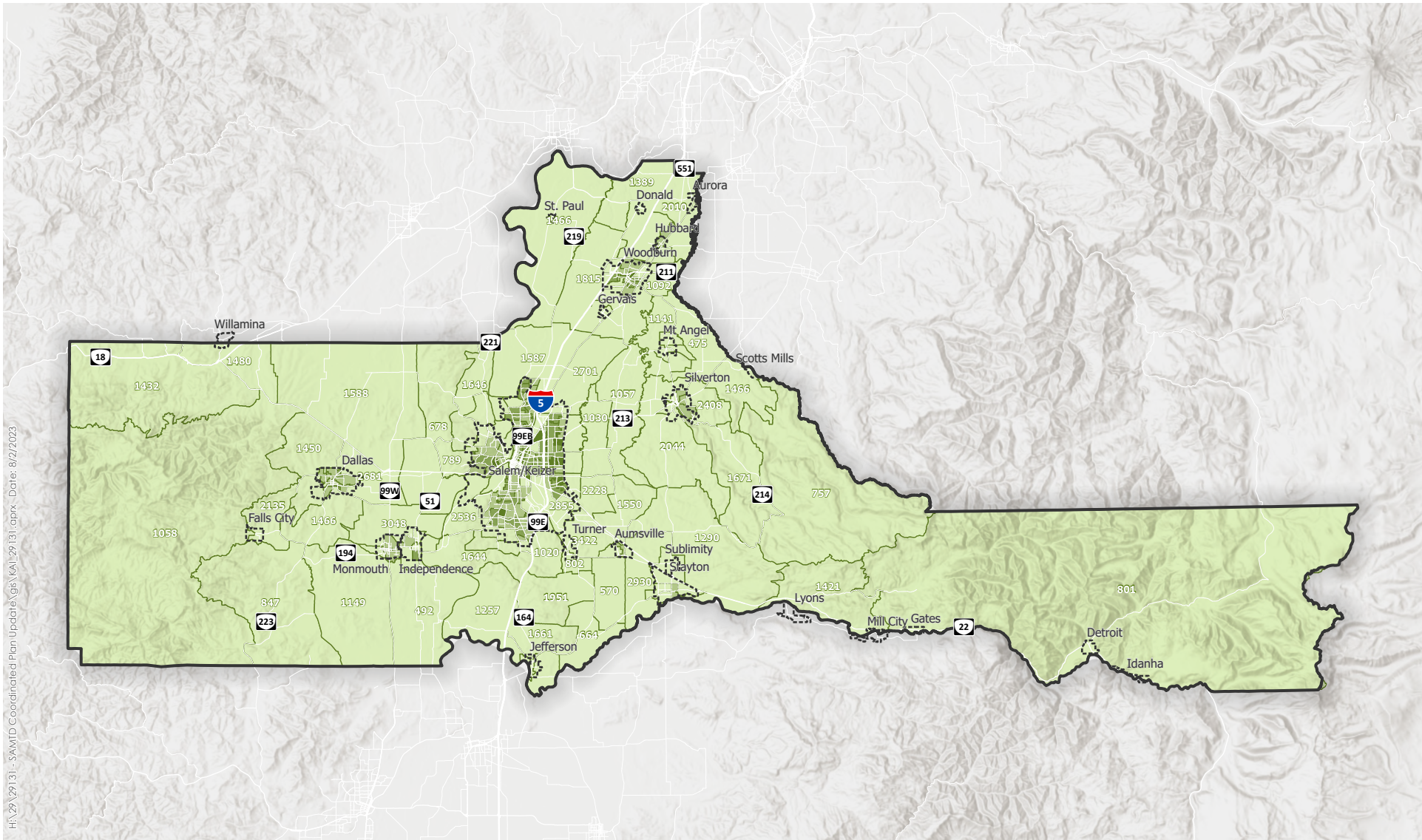
These areas include clusters of medical service centers, grocery stores, or other commercial buildings with food and shopping services and generally have lower population densities of people with disabilities and/ or seniors because they are more commercial in nature.

There are several block groups in the Salem/ Keizer UGB with high population densities of people that meet LIFT eligibility relative to Marion and Polk County demographic data. While the percentage of the population meeting that demographic may be high in these areas, the total number of people meeting LIFT eligibility may be low because the area is more industrial or rural in nature. In general, residential areas with the highest population densities of people eligible for LIFT are also areas with clusters of origin and destination data.







## **Cherriots Shop and Ride**

Cherriots Shop and Ride includes a dial-a-ride service and Shopper Shuttle for seniors aged 60 and over and individuals with disabilities. The dial-a-ride and Shopping Shuttle services pick individuals up at their homes and can take them to any location within the Salem-Keizer UGB (dial-a-ride) or to designated store locations (Shopper Shuttle). The Stop and Ride service is currently suspended until further notice.



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**People per Square Mile by Block Group**

-  2 - 2,194
-  2,195 - 5,116
-  5,117 - 8,763
-  8,764 - 18,139



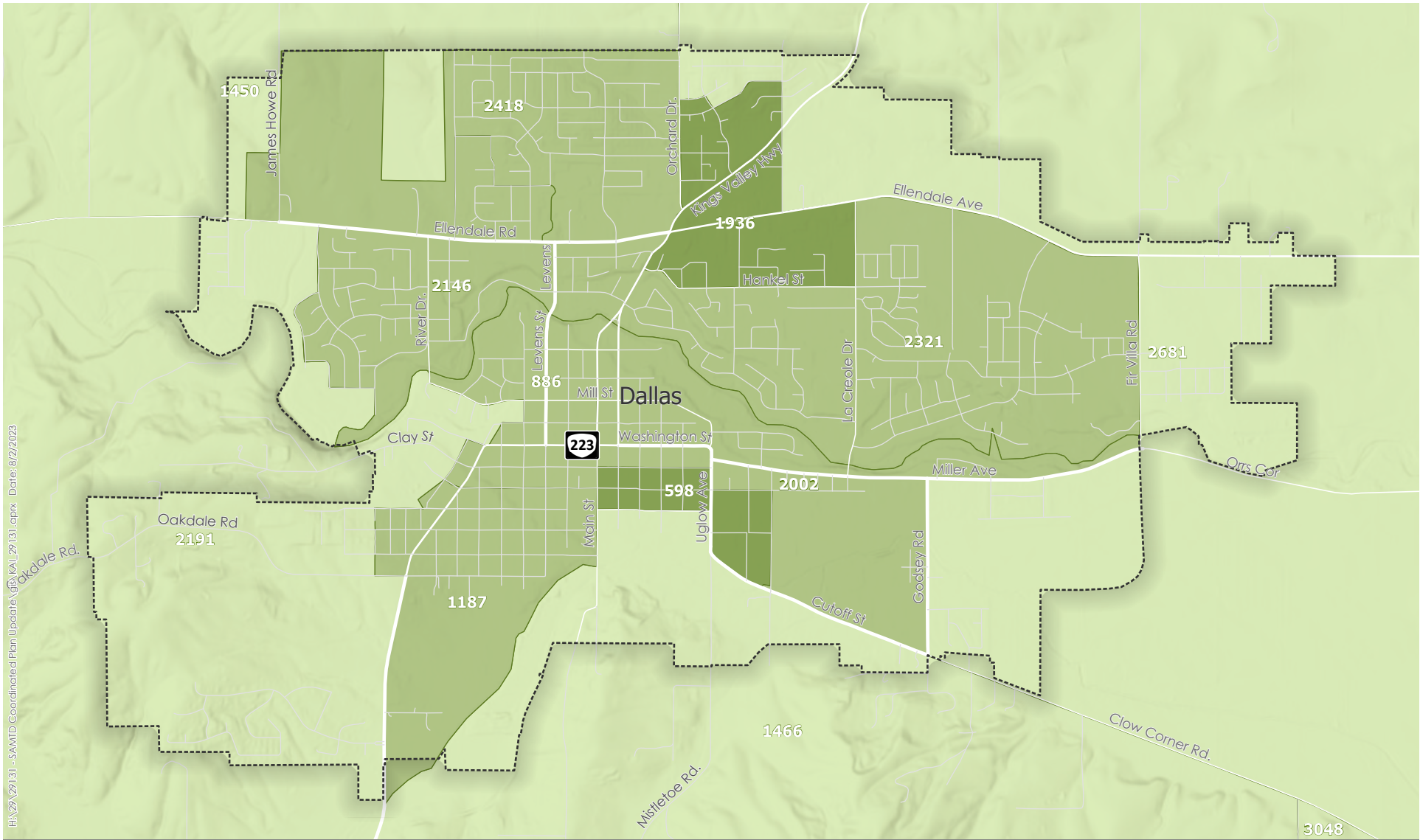
-  County Boundary
-  UGB









Figure 1

**Population Density  
Marion and Polk Counties, OR**



**People per Square Mile by Block Group**

-  2 - 2,194
-  2,195 - 5,116
-  5,117 - 8,763
-  8,764 - 18,139

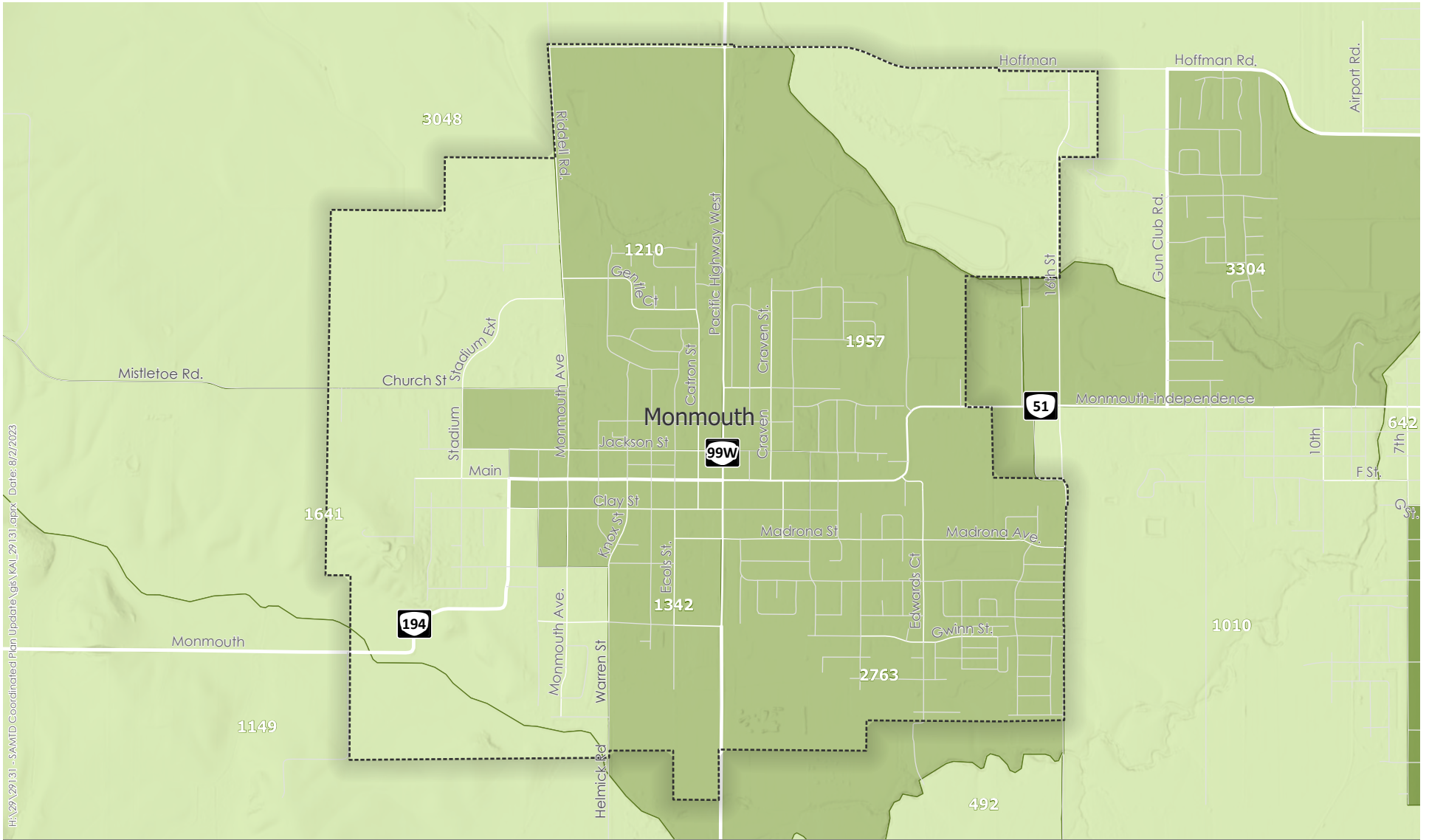
-  County Boundary
-  UGB

0 0.9 Miles



Figure 1

**Population Density  
Dallas, OR**



**People per Square Mile by Block Group**

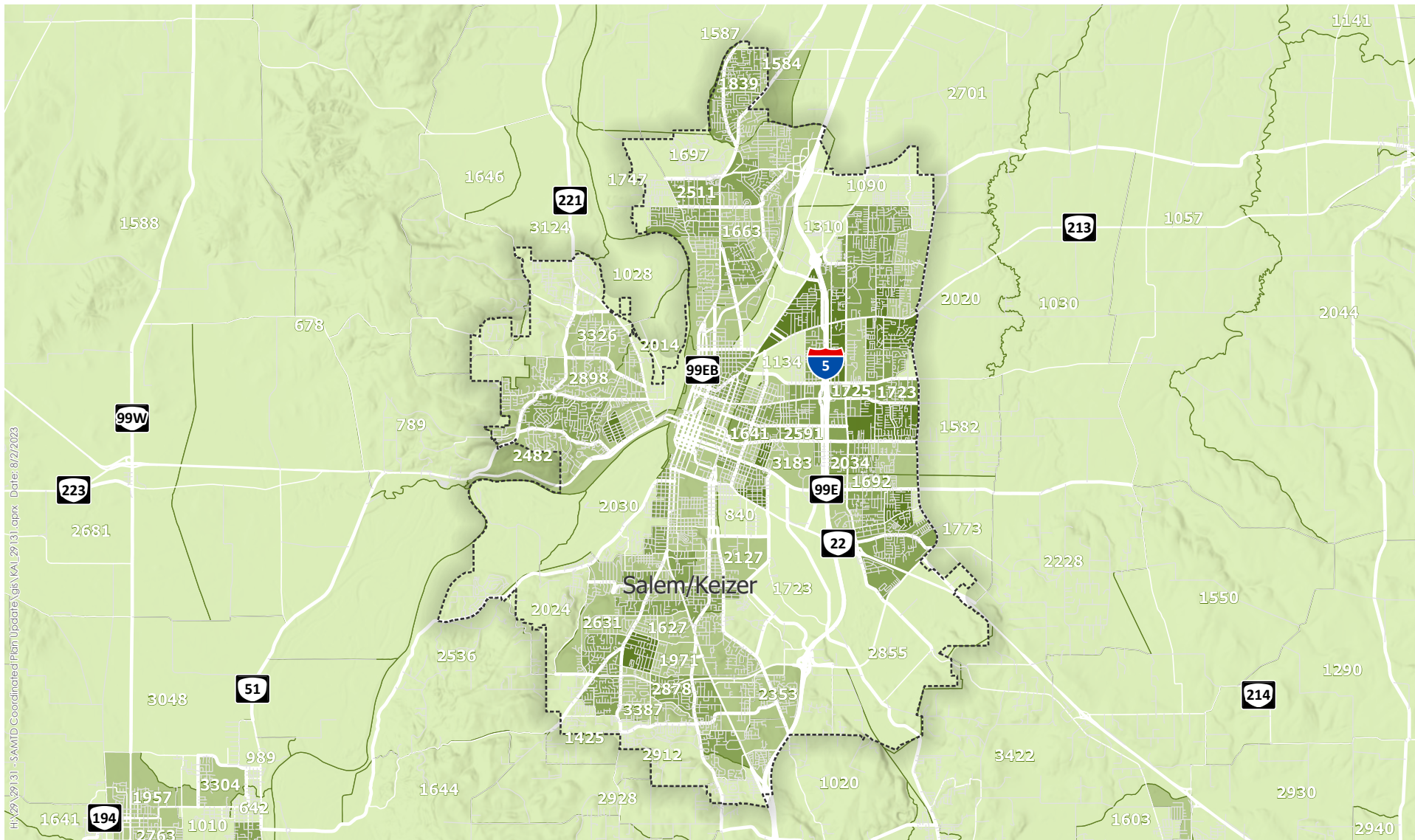
- 2 - 2,194
- 2,195 - 5,116
- 5,117 - 8,763
- 8,764 - 18,139

- County Boundary
- UGB







Figure 1

**Population Density  
Monmouth, OR**



**People per Square Mile by Block Group**

-  2 - 2,194
-  2,195 - 5,116
-  5,117 - 8,763
-  8,764 - 18,139



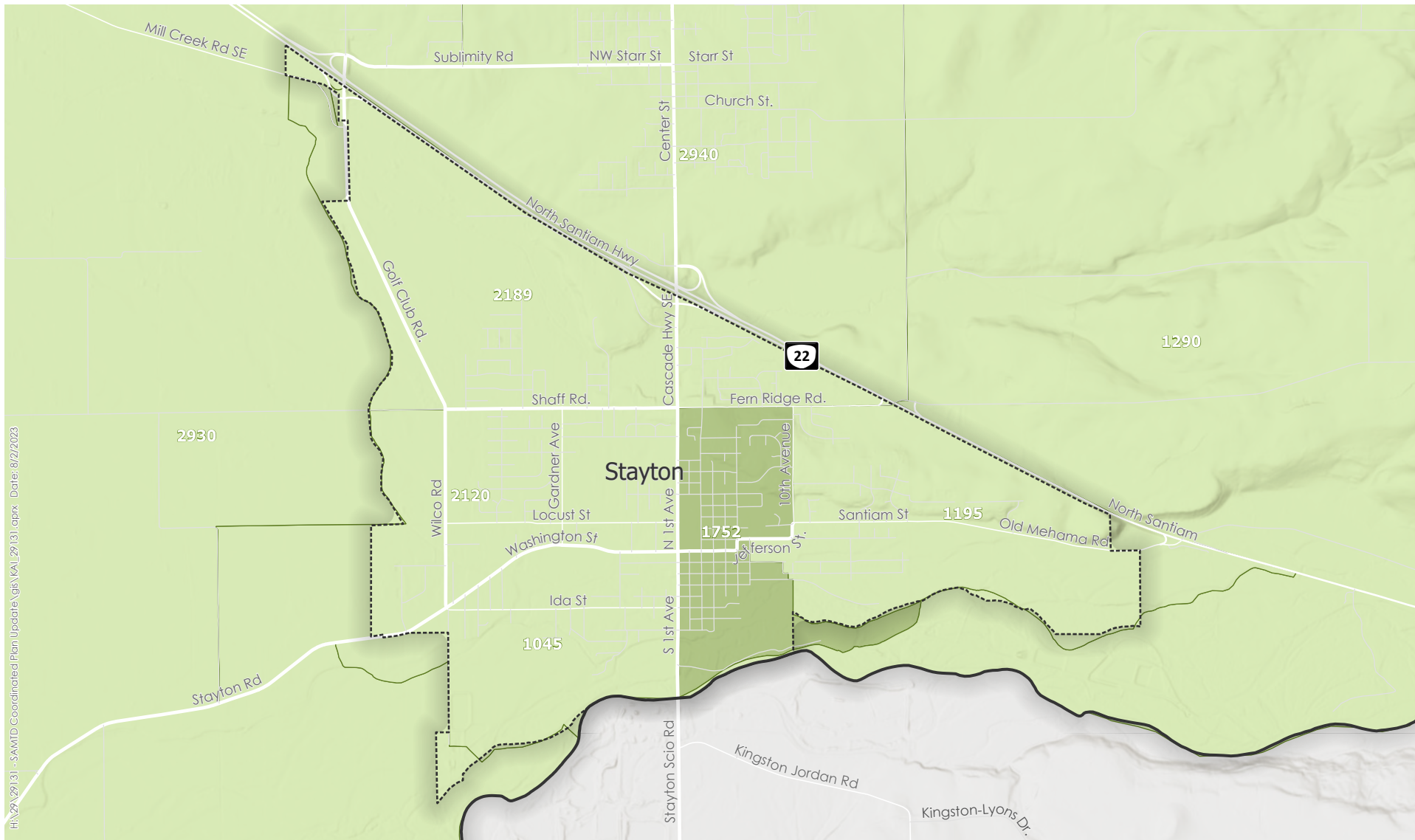
-  County Boundary
-  UGB







Figure 1

**Population Density  
Salem/Keizer, OR**



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**People per Square Mile by Block Group**

-  2 - 2,194
-  2,195 - 5,116
-  5,117 - 8,763
-  8,764 - 18,139



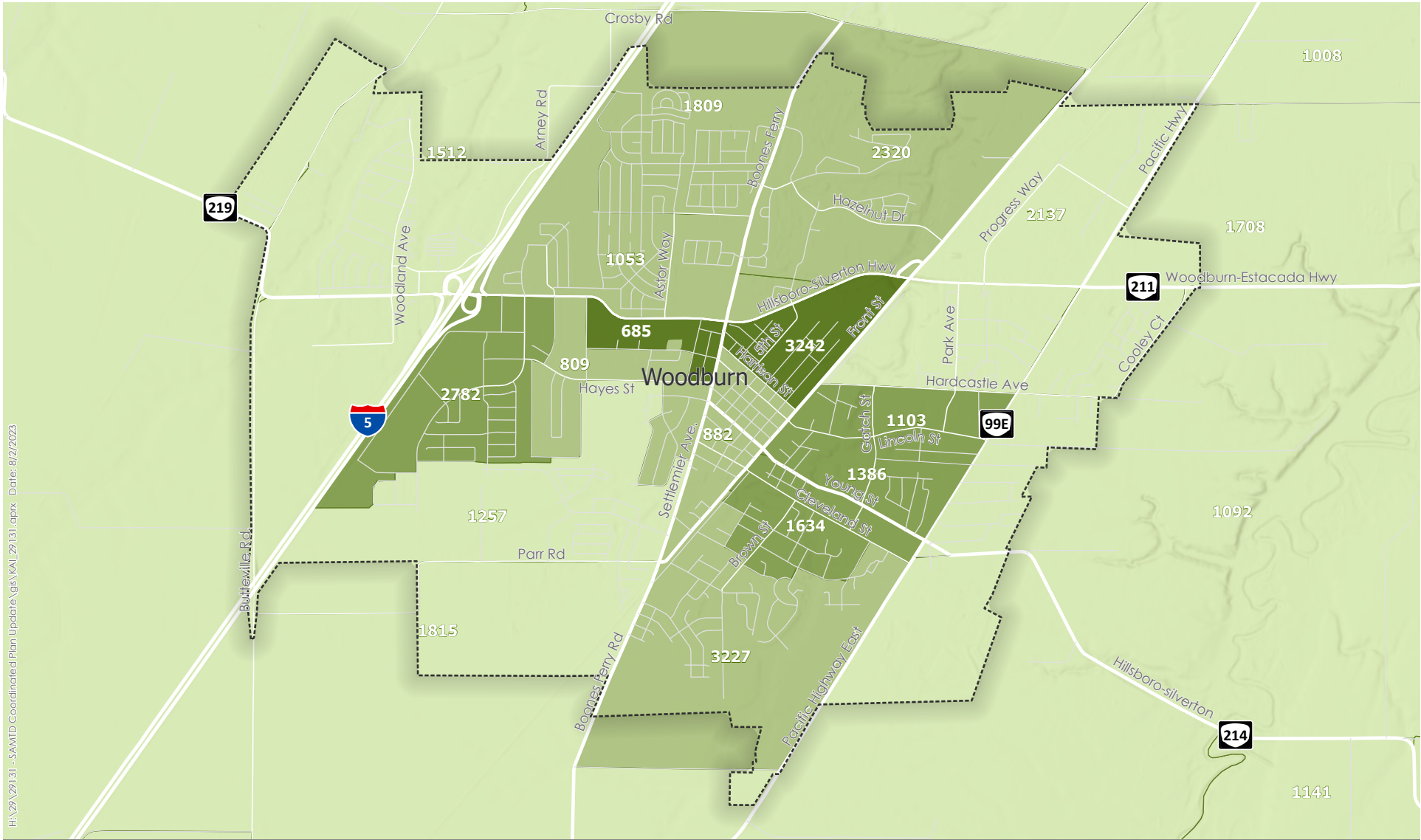
-  County Boundary
-  UGB







Figure 1

**Population Density  
Stayton, OR**



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**People per Square Mile by Block Group**

-  2 - 2,194
-  2,195 - 5,116
-  5,117 - 8,763
-  8,764 - 18,139



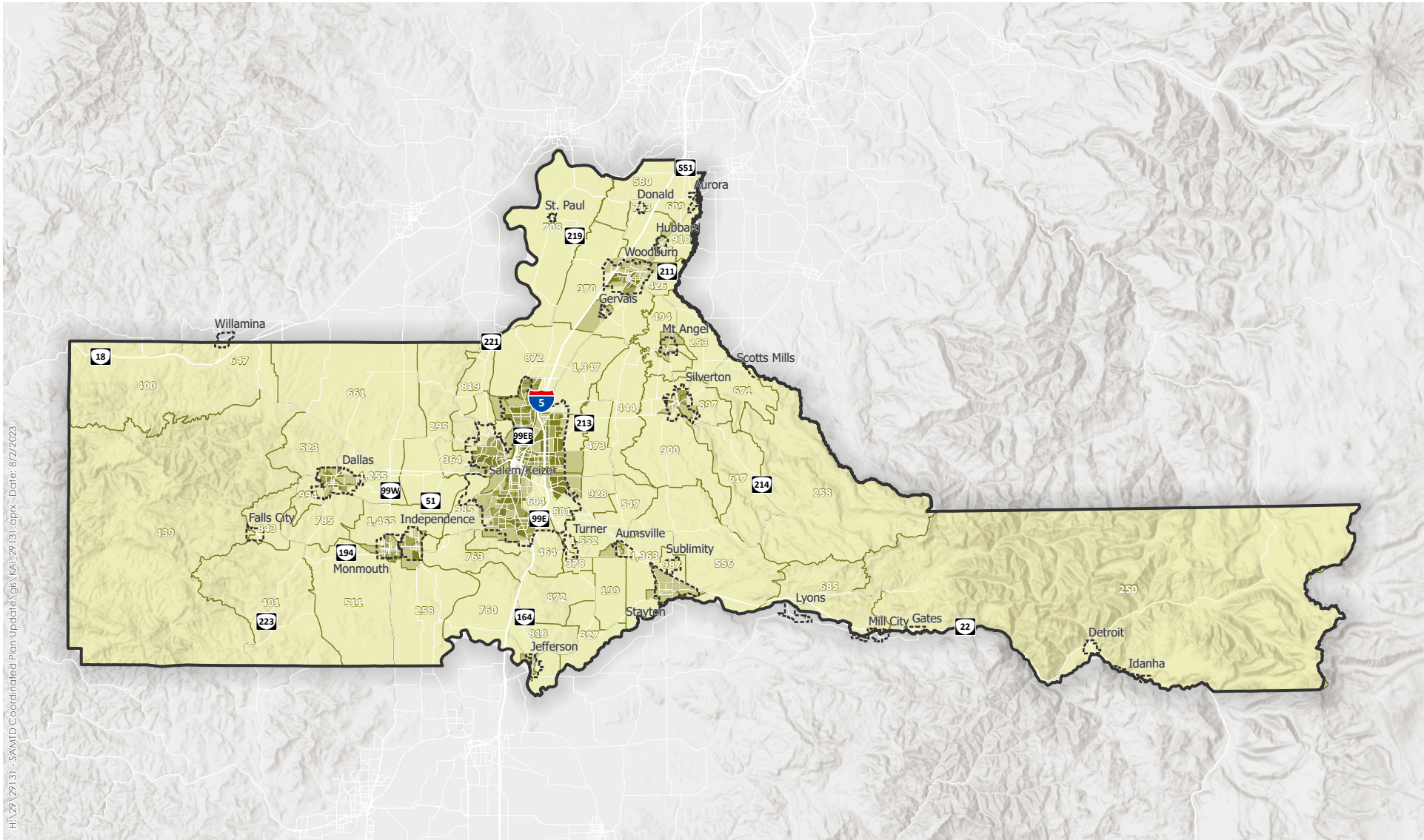
-  County Boundary
-  UGB







Figure 1

**Population Density  
Woodburn, OR**



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**Employed Population per Square Mile by Block Group**

-  1 - 295
-  296 - 1,374
-  1,375 - 2,772
-  2,773 - 11,381



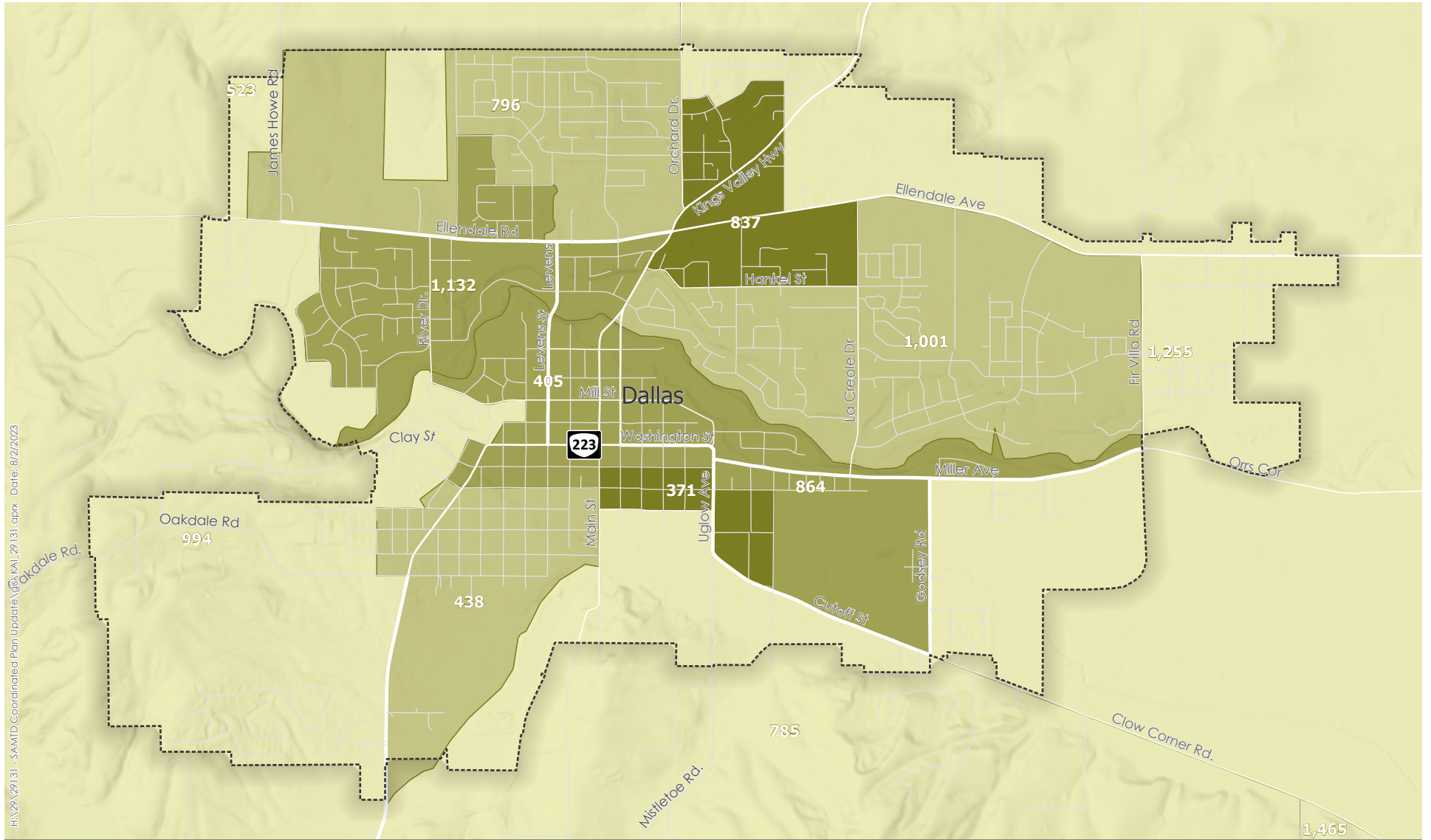
-  County Boundary
-  UGB



Figure 2

**Employment Density  
Marion and Polk Counties, OR**





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**Employed Population per Square Mile by Block Group**

- 1 - 295
- 296 - 1,374
- 1,375 - 2,772
- 2,773 - 11,381

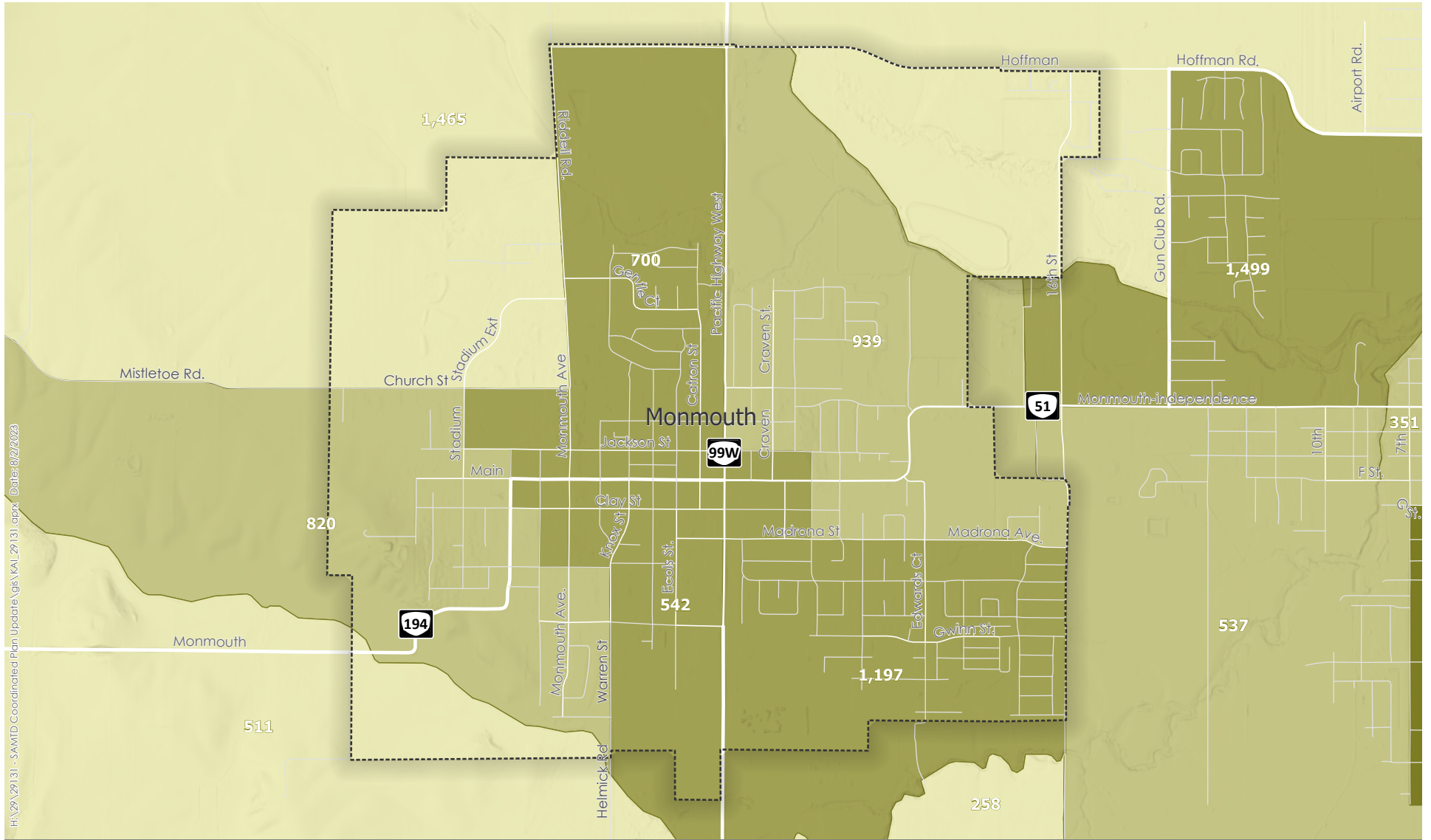
- County Boundary
- UGB

0  0.9 Miles



Figure 2

**Employment Density  
Dallas, OR**



**Employed Population per Square Mile by Block Group**

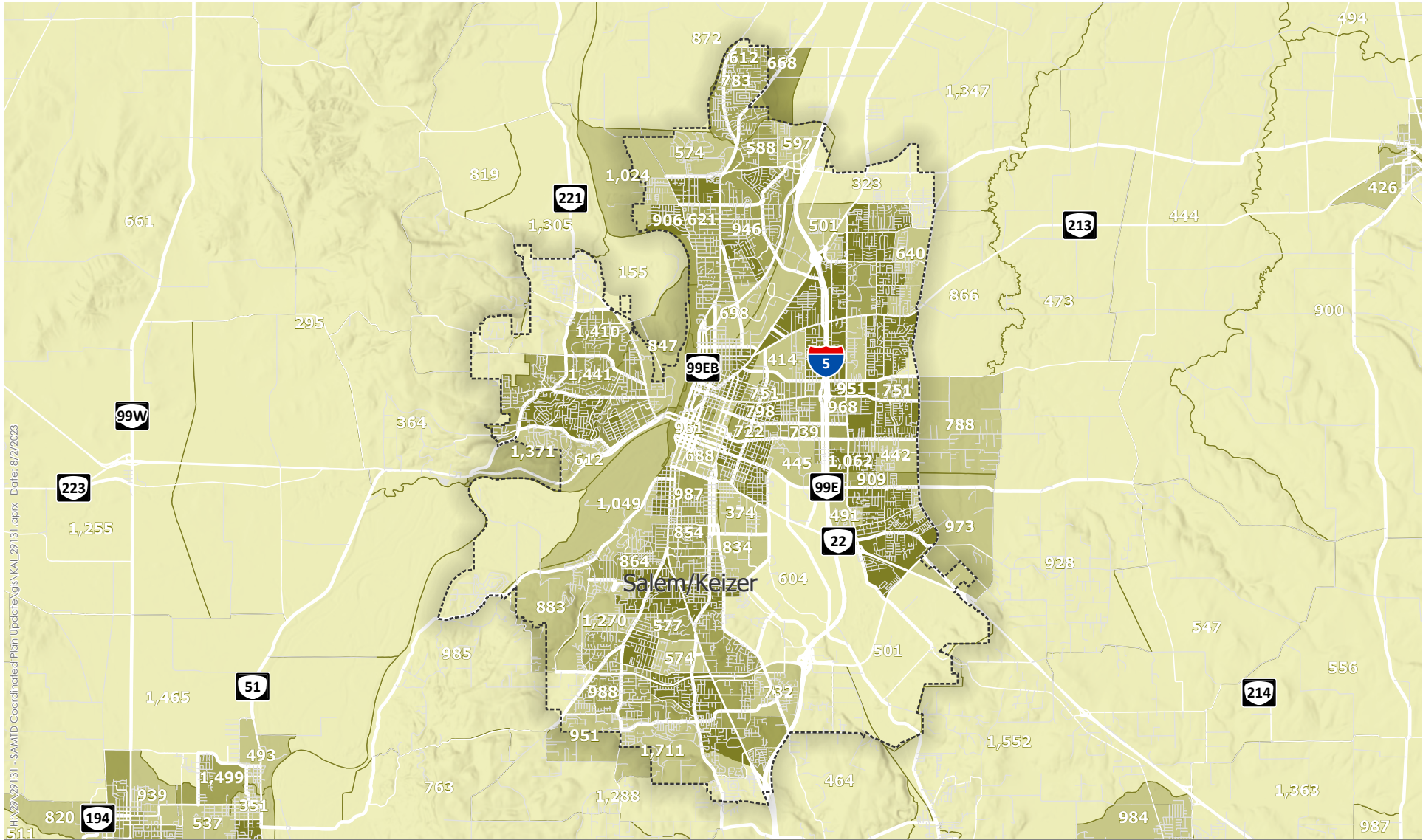
- 1 - 295
- 296 - 1,374
- 1,375 - 2,772
- 2,773 - 11,381

- County Boundary
- UGB







Figure 2

**Employment Density  
Monmouth, OR**



**Employed Population per Square Mile by Block Group**

-  1 - 295
-  296 - 1,374
-  1,375 - 2,772
-  2,773 - 11,381



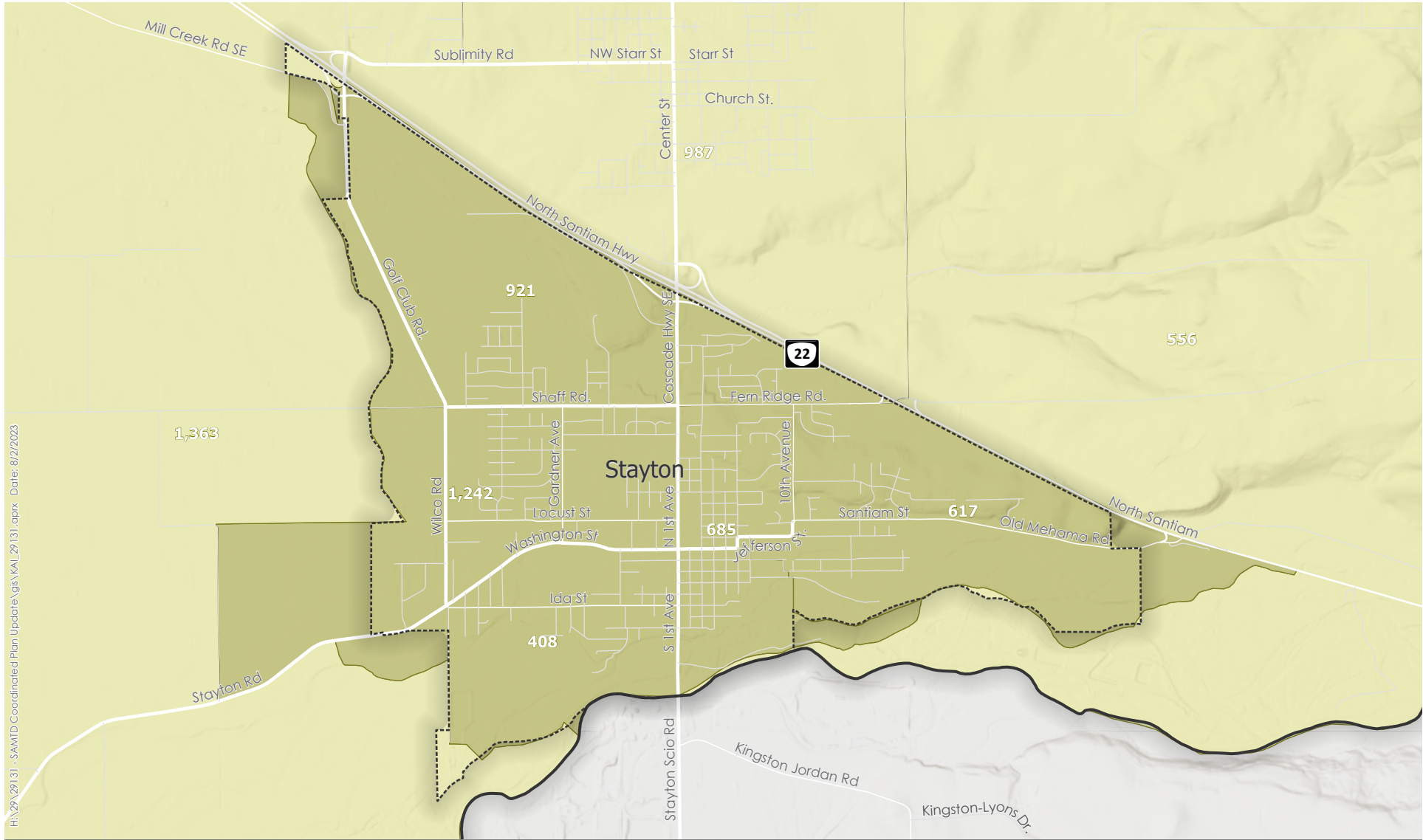
-  County Boundary
-  UGB



Figure 2

**Employment Density  
Salem/Keizer, OR**



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**Employed Population per Square Mile by Block Group**

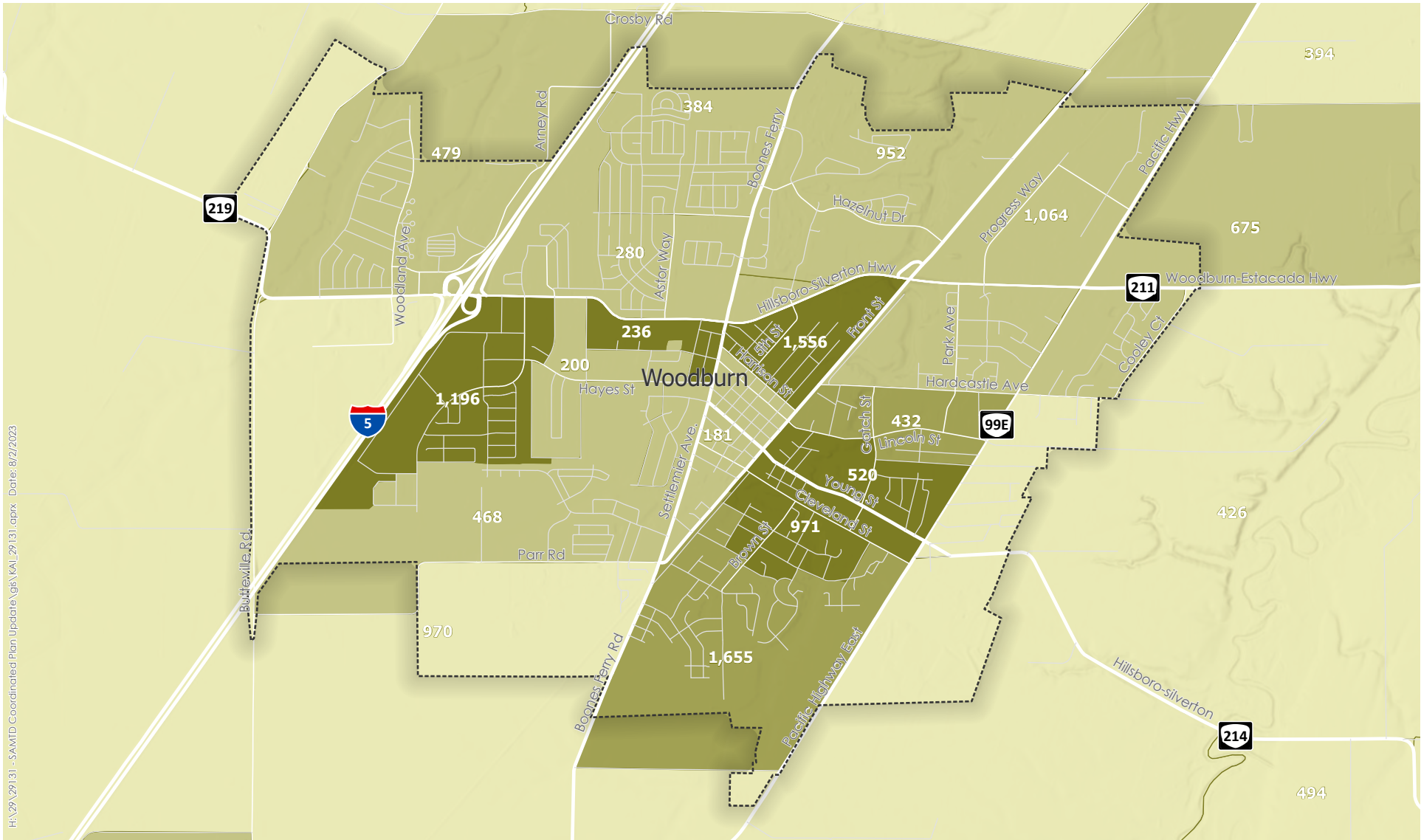
- 1 - 295
- 296 - 1,374
- 1,375 - 2,772
- 2,773 - 11,381

- County Boundary
- UGB



Figure 2

**Employment Density  
Stayton, OR**



H:\29\29131 - SAMTD Coordinated Plan Update\gis\KAL\_29131.aprx Date: 8/2/2023

**Employed Population per Square Mile by Block Group**

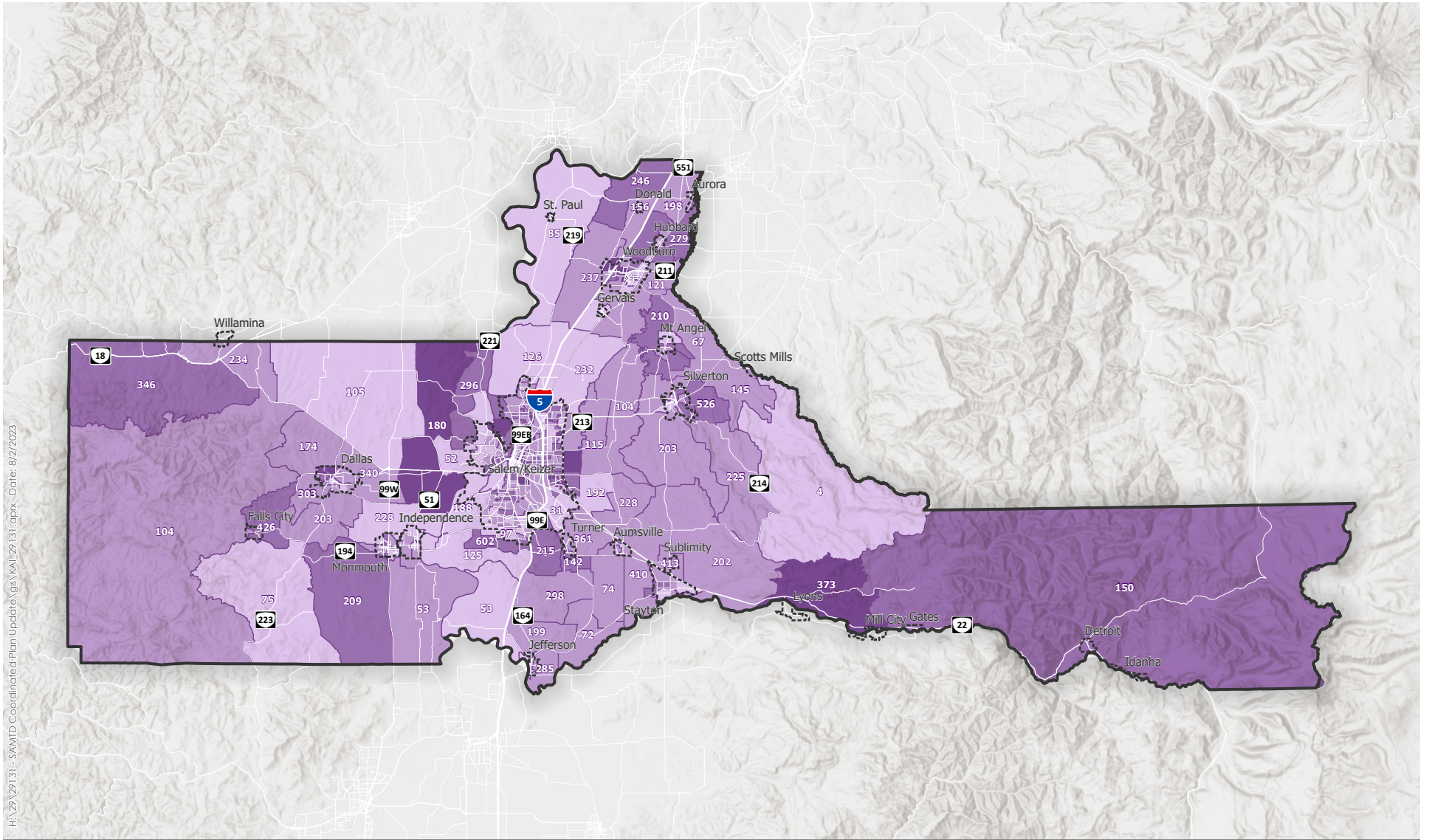
- 1 - 295
- 296 - 1,374
- 1,375 - 2,772
- 2,773 - 11,381

- County Boundary
- UGB



Figure 2

**Employment Density  
Woodburn, OR**



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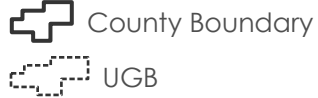
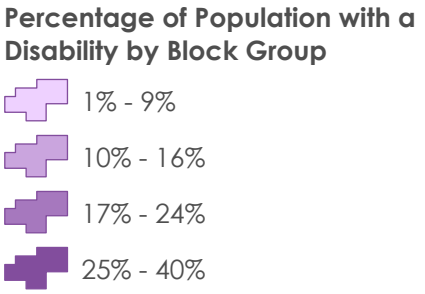
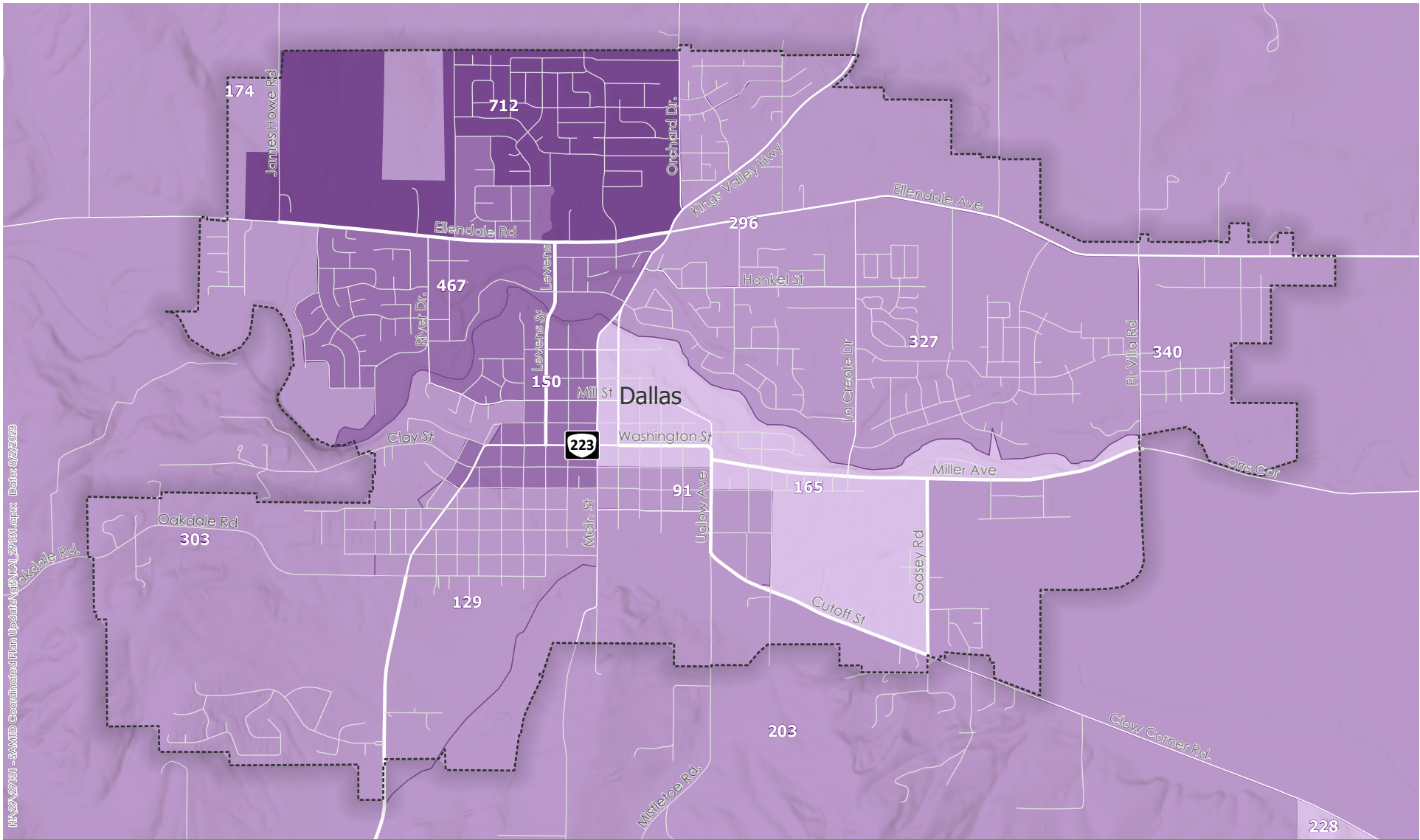


Figure 3

**Population with Disabilities  
Marion and Polk Counties, OR**



**Percentage of Population with a Disability by Block Group**

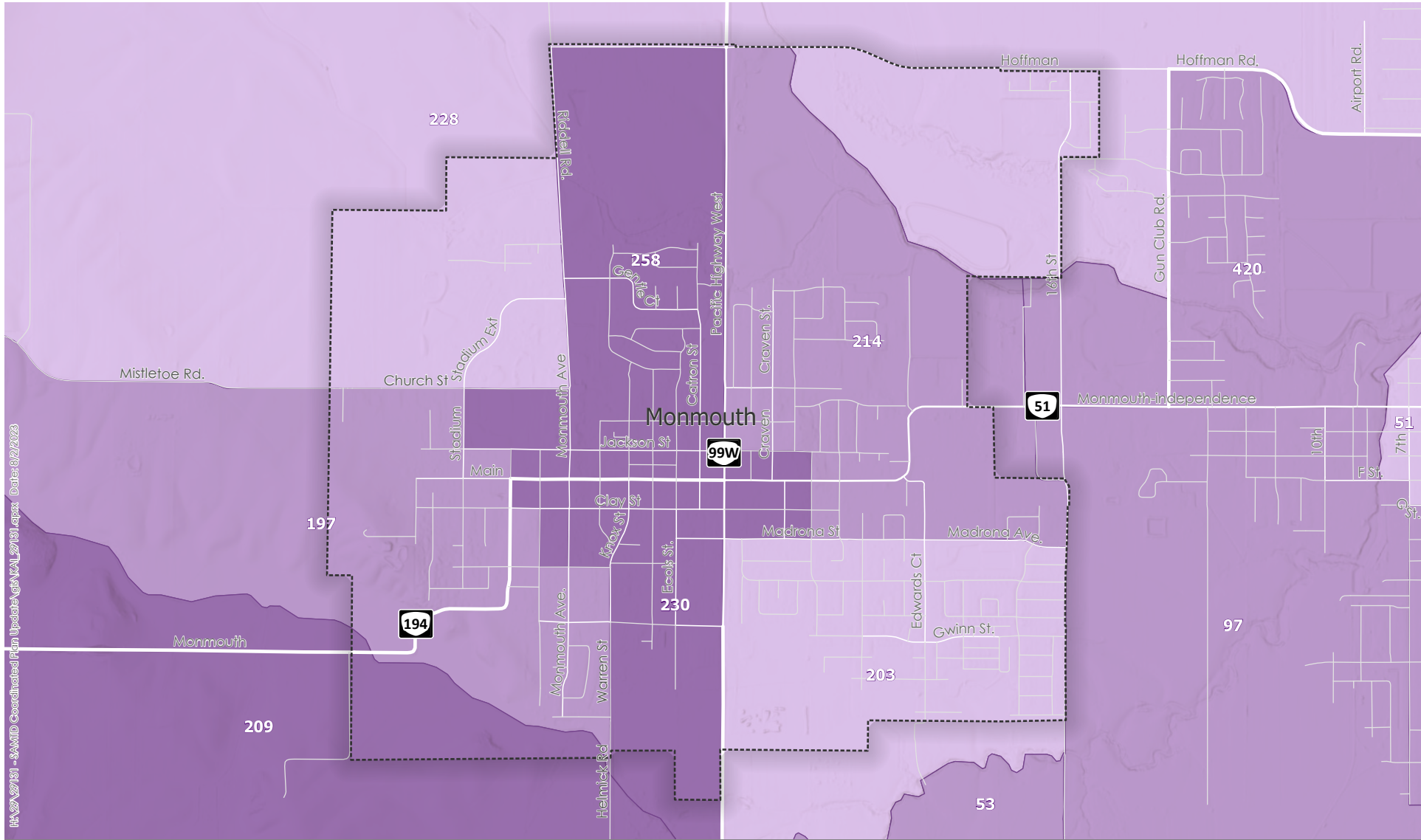
- 1% - 9%
- 10% - 16%
- 17% - 24%
- 25% - 40%

- County Boundary
- UGB







Figure 3

**Population with Disabilities  
Dallas, OR**



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**Percentage of Population with a Disability by Block Group**

-  1% - 9%
-  10% - 16%
-  17% - 24%
-  25% - 40%



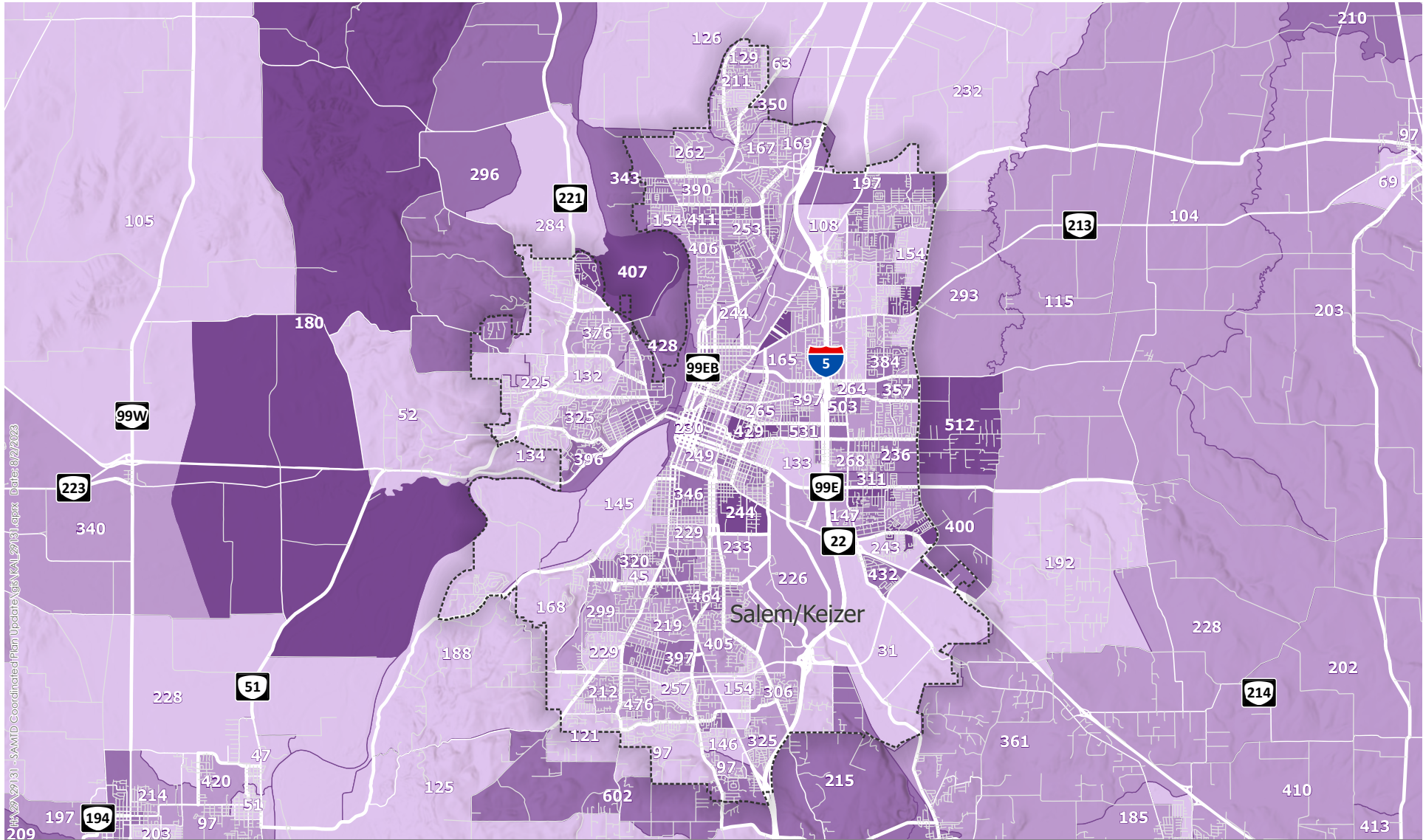
-  County Boundary
-  UGB



Figure 3

**Population with Disabilities  
Monmouth, OR**





**Percentage of Population with a Disability by Block Group**

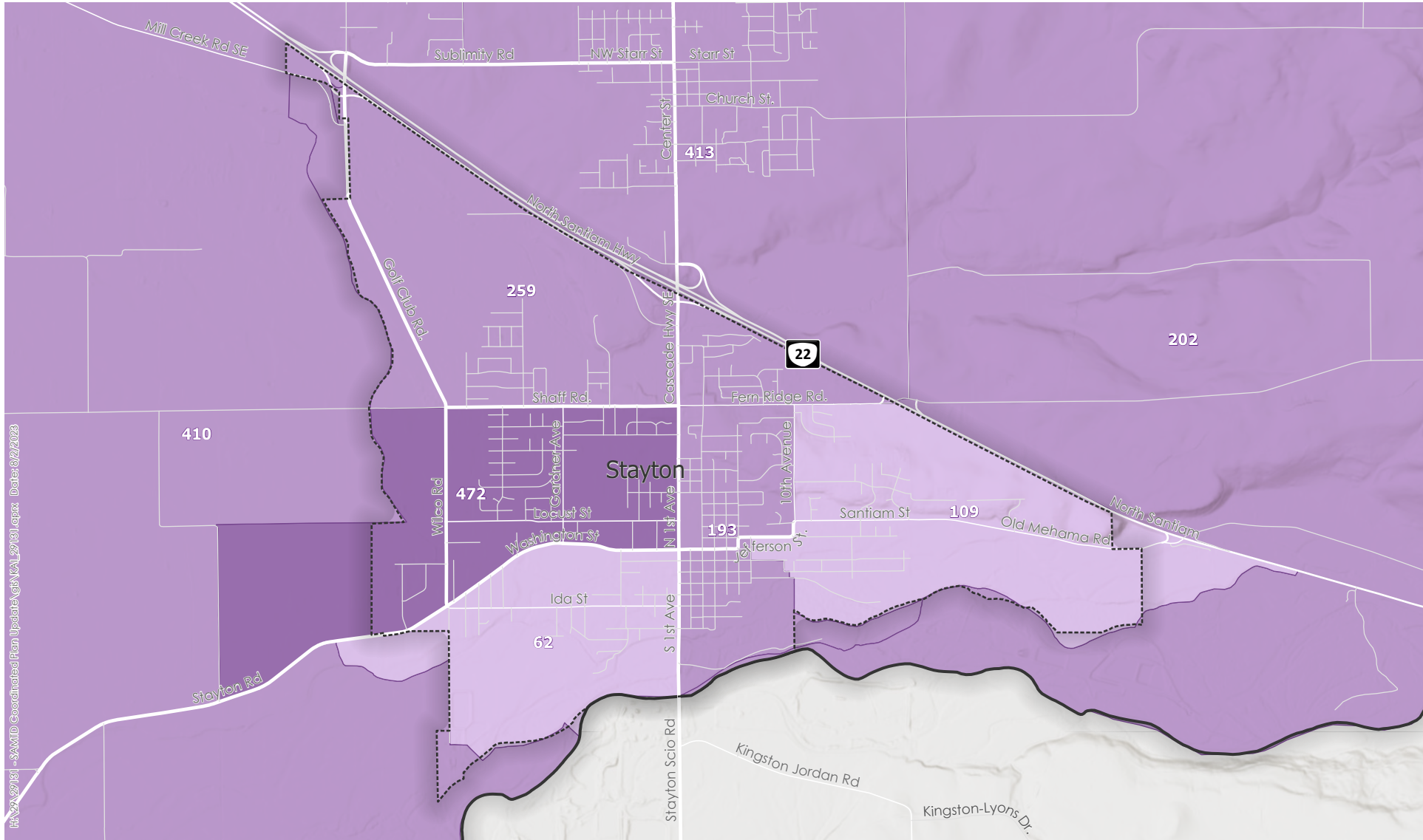
- 1% - 9%
- 10% - 16%
- 17% - 24%
- 25% - 40%

- County Boundary
- UGB



Figure 3

**Population with Disabilities  
Salem/Keizer, OR**



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**Percentage of Population with a Disability by Block Group**

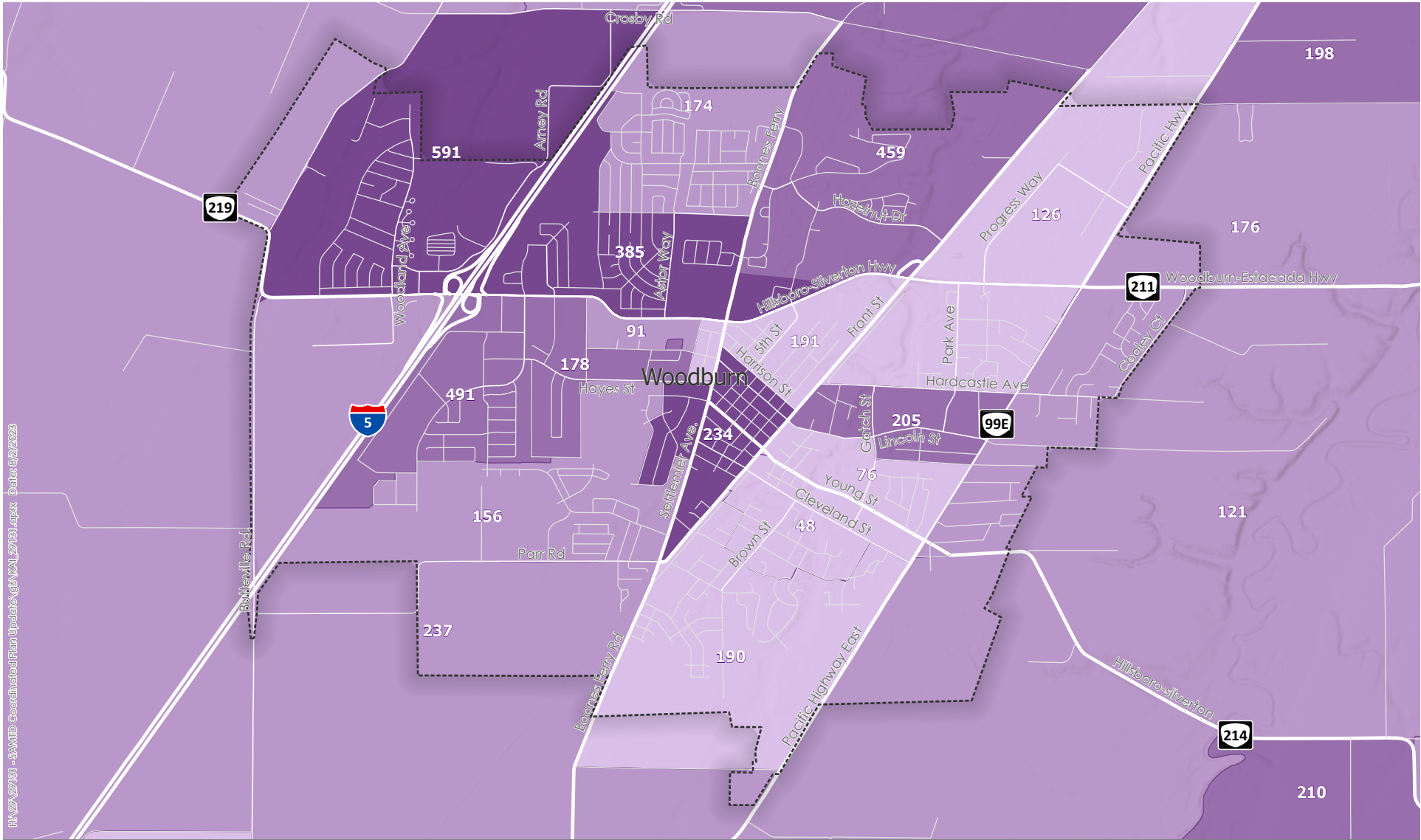
- 1% - 9%
- 10% - 16%
- 17% - 24%
- 25% - 40%

- County Boundary
- UGB



Figure 3

**Population with Disabilities  
Stayton, OR**



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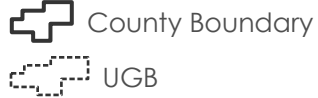
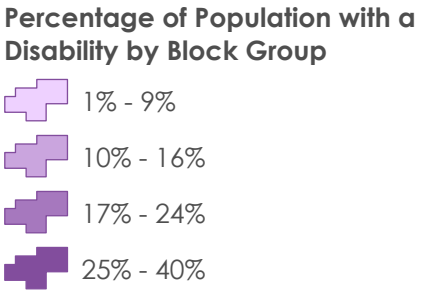
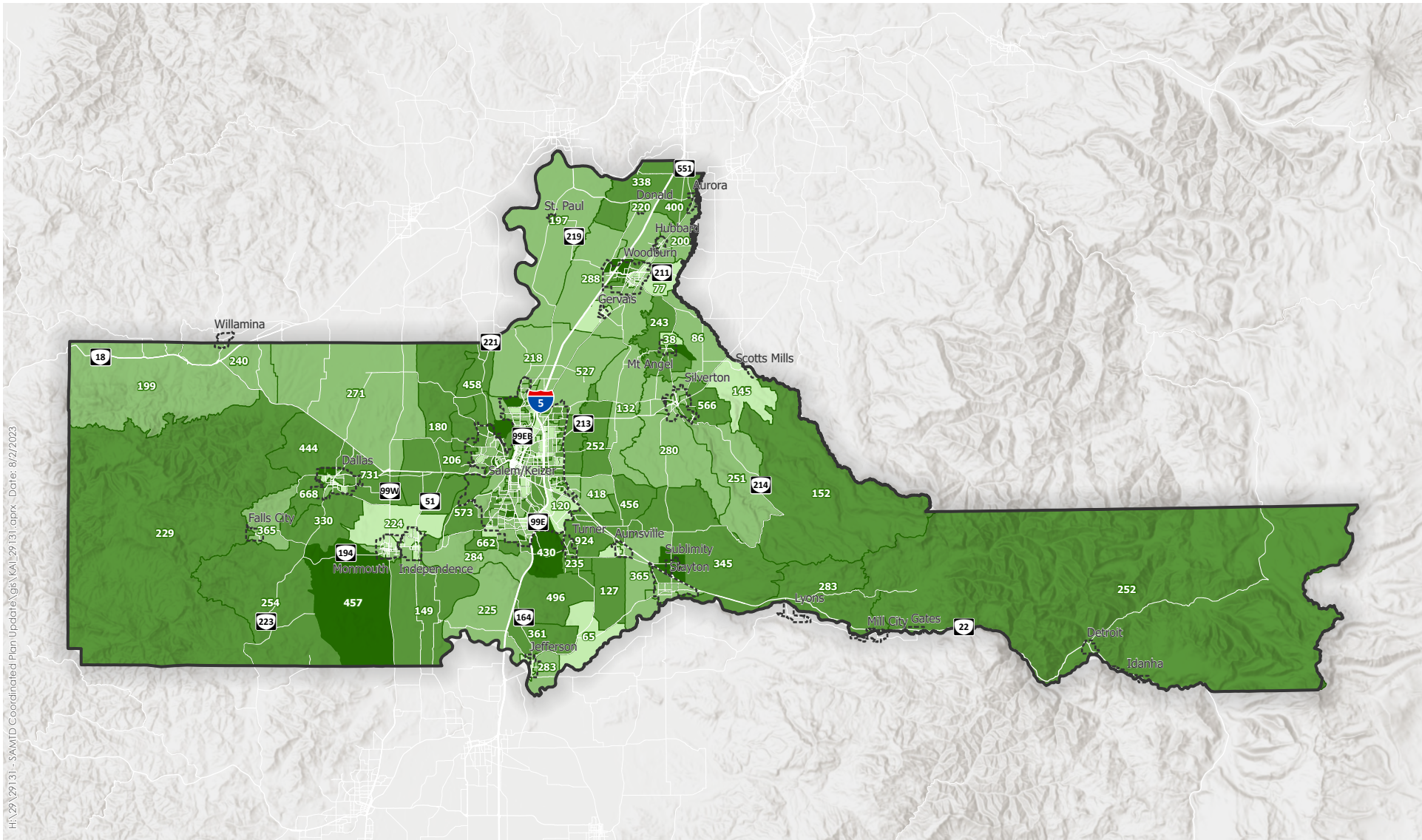


Figure 3

**Population with Disabilities  
Woodburn, OR**



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**Percentage of Population Age 65 and Over by Block Group**

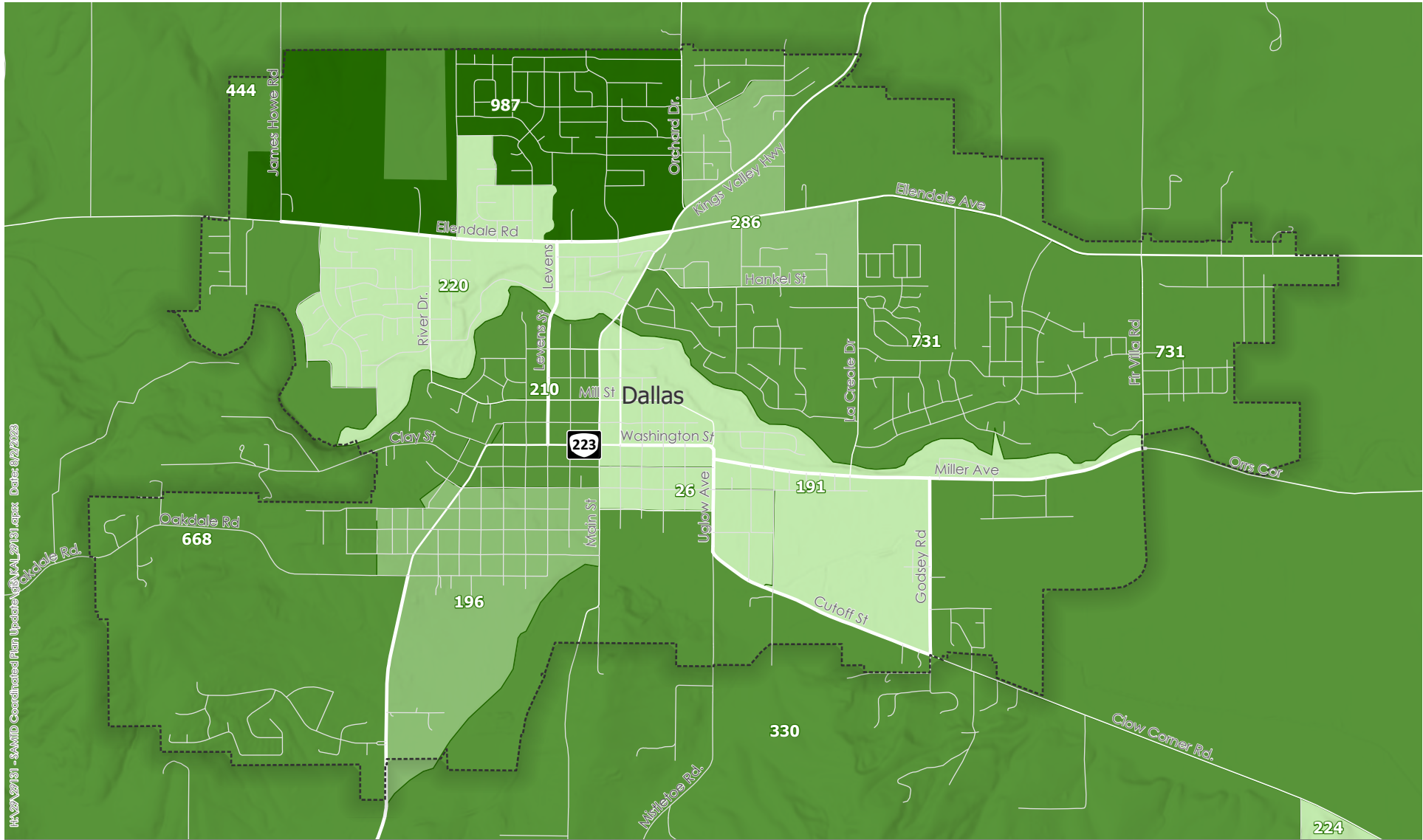
- 1% - 10%
- 11% - 20%
- 21% - 34%
- 35% - 76%

- County Boundary
- UGB



Figure 4

**Senior Population (Age 65 and Older)  
Marion and Polk Counties, OR**



**Percentage of Population Age 65 and Over by Block Group**

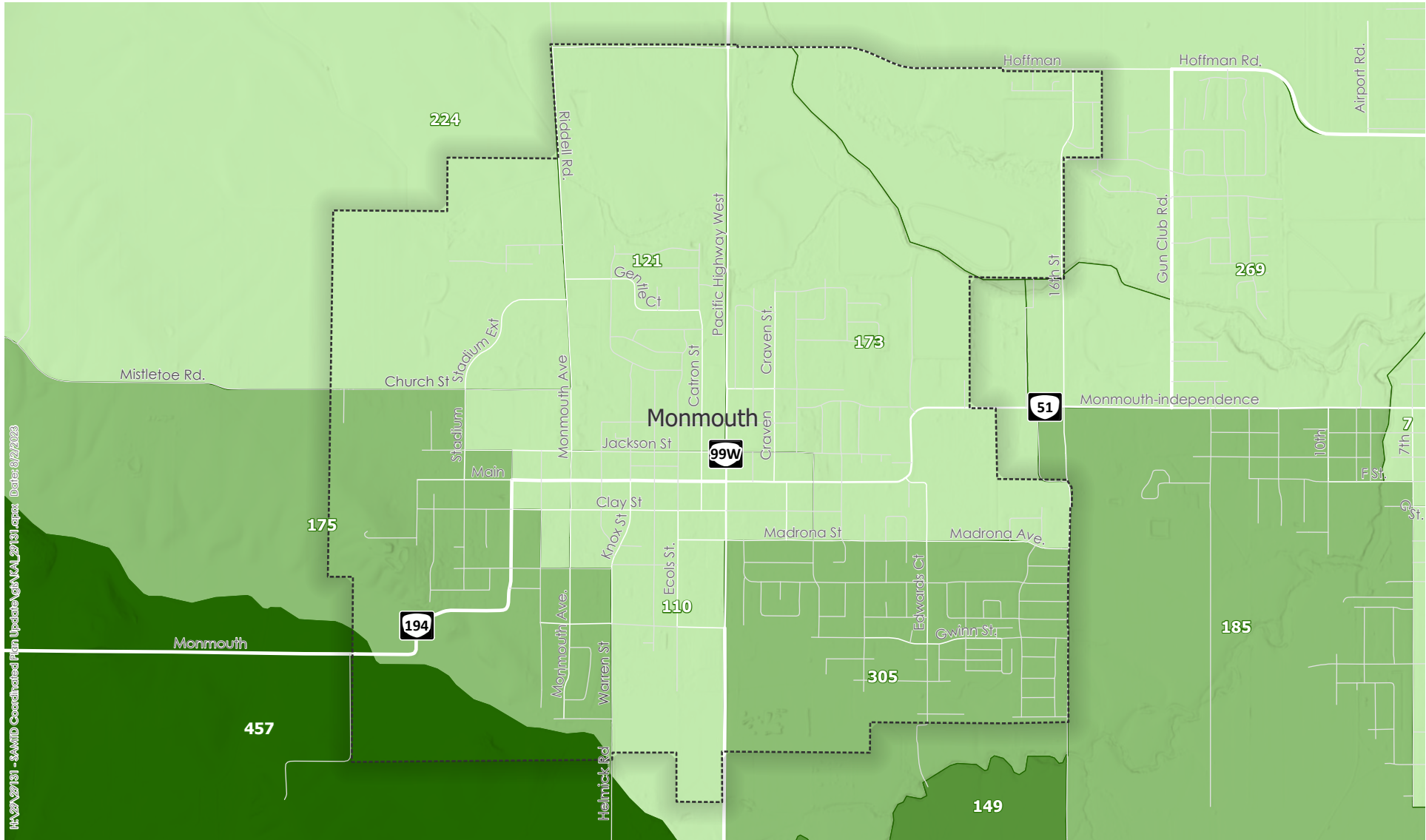
- 1% - 10%
- 11% - 20%
- 21% - 34%
- 35% - 76%

- County Boundary
- UGB



Figure 4

**Senior Population (Age 65 and Older)  
Dallas, OR**



**Percentage of Population Age 65 and Over by Block Group**

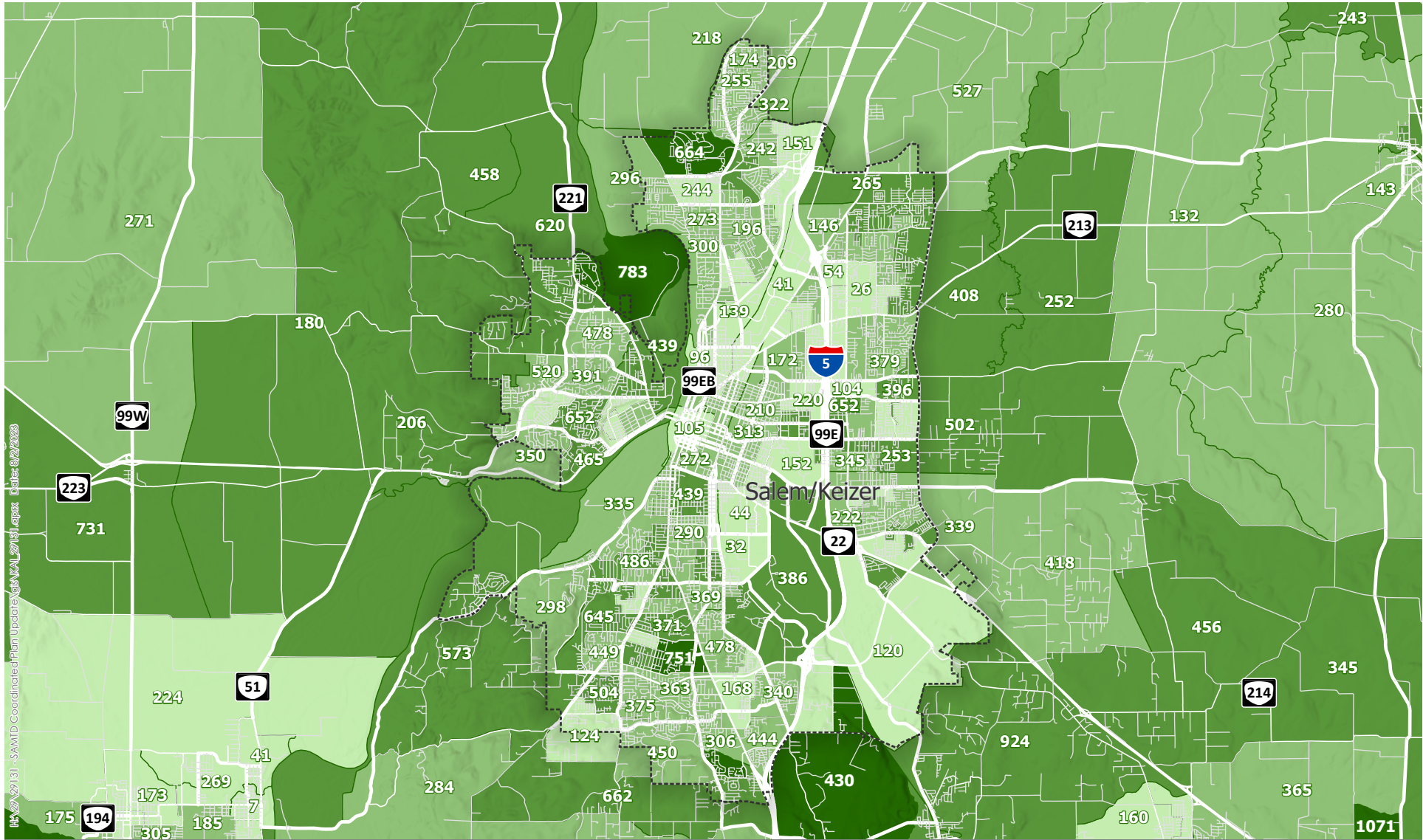
- 1% - 10%
- 11% - 20%
- 21% - 34%
- 35% - 76%

- County Boundary
- UGB



Figure 4

**Senior Population (Age 65 and Older)  
Monmouth, OR**



Percentage of Population Age 65 and Over by Block Group

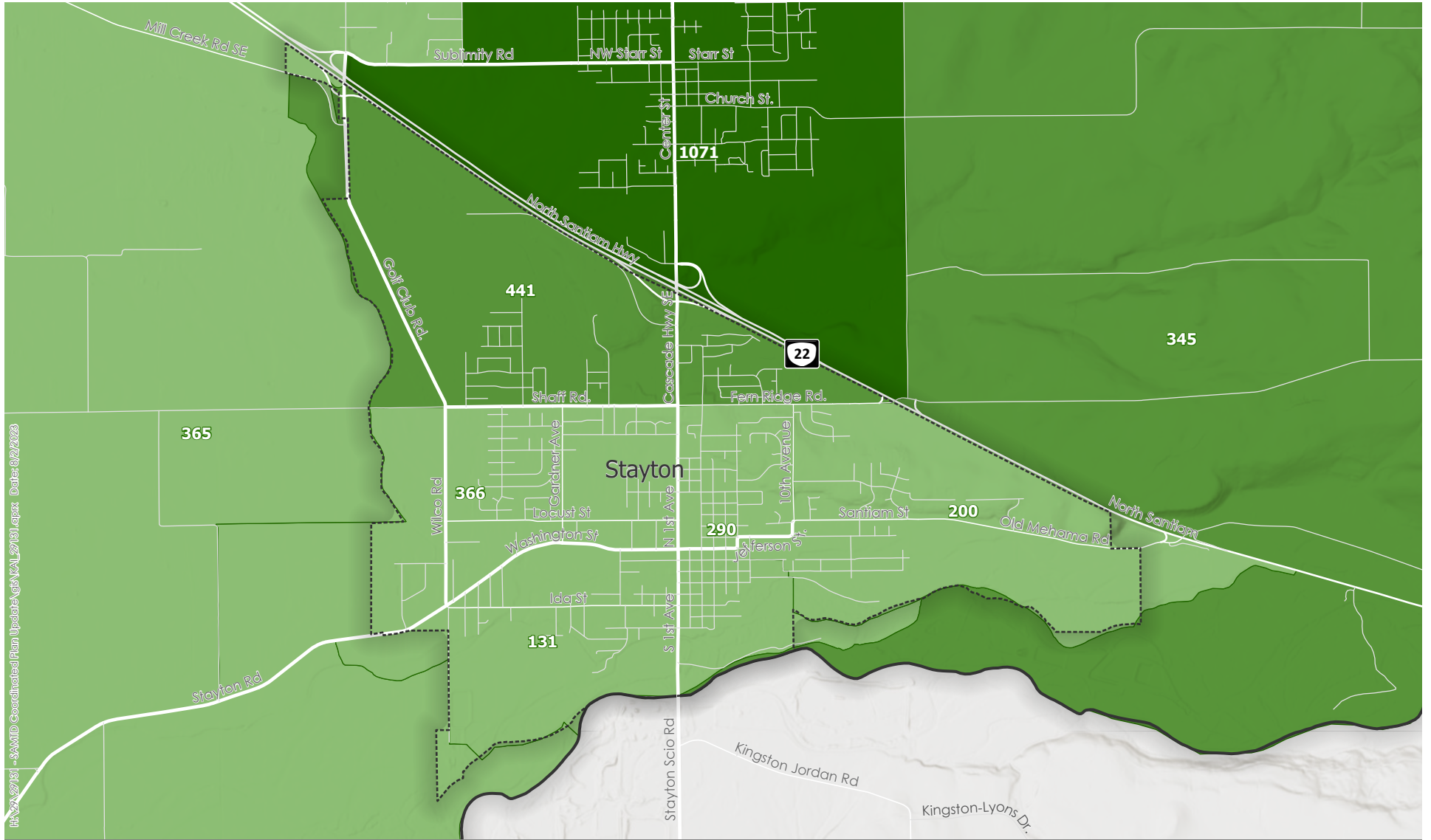
- 1% - 10%
- 11% - 20%
- 21% - 34%
- 35% - 76%

- County Boundary
- UGB



Figure 4

Senior Population (Age 65 and Older)  
Salem/Keizer, OR



**Percentage of Population Age 65 and Over by Block Group**

- 1% - 10%
- 11% - 20%
- 21% - 34%
- 35% - 76%

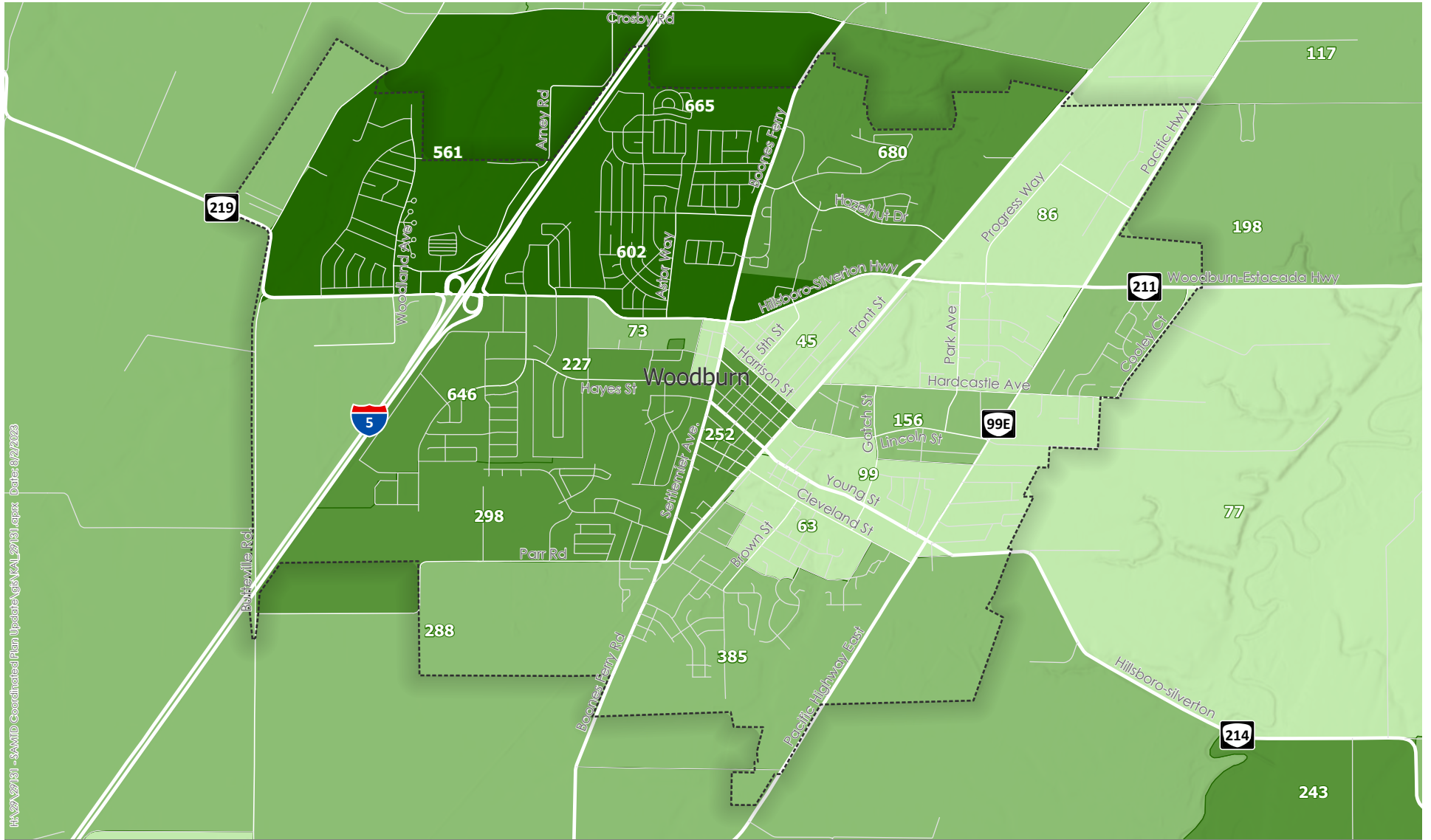
- County Boundary
- UGB



Figure 4

**Senior Population (Age 65 and Older)  
Stayton, OR**





H:\22\27181 - SAMID Coordinated Plan Update\GIS\Map\_27181.aprx Date: 8/2/2023

**Percentage of Population Age 65 and Over by Block Group**

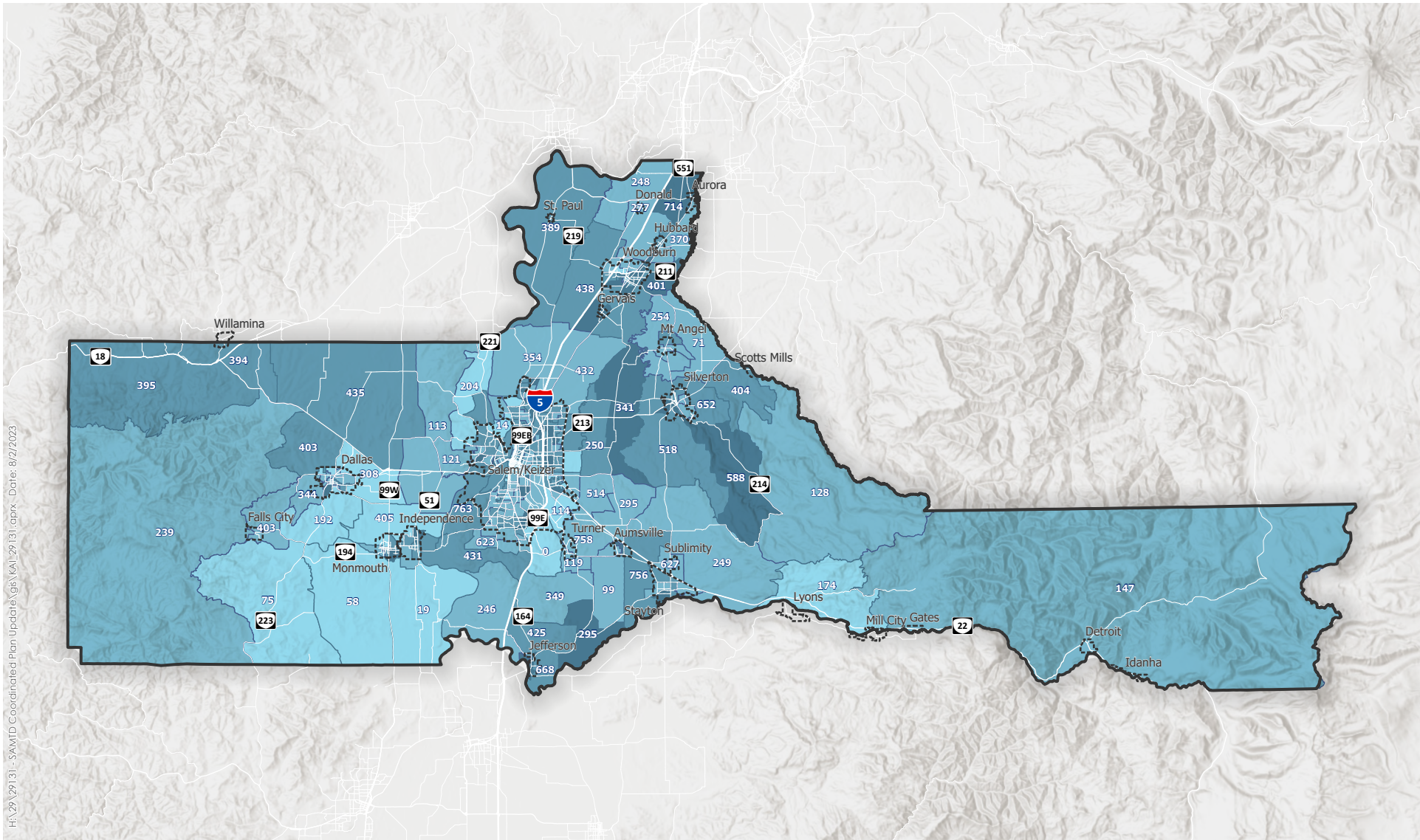
- 1% - 10%
- 11% - 20%
- 21% - 34%
- 35% - 76%

- County Boundary
- UGB



Figure 4

**Senior Population (Age 65 and Older)  
Woodburn, OR**



H:\29\29131 - SAMTD Coordinated Plan Update\GIS\KAL\29131.aprx Date: 8/12/2023

**Percentage of Youth (Age 17 and Under) by Block Group**

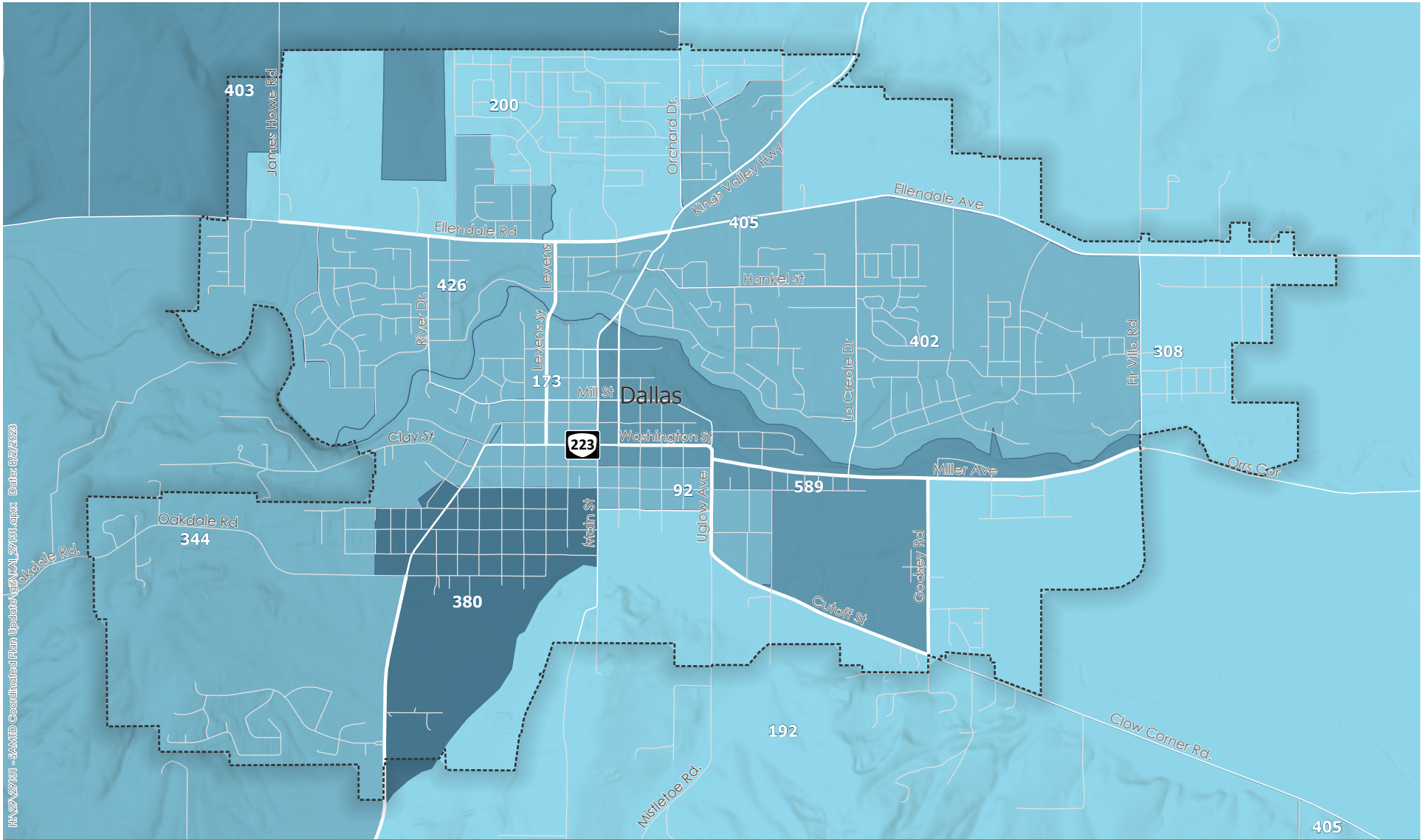
- 0% - 13%
- 14% - 23%
- 24% - 32%
- 33% - 44%

- County Boundary
- UGB



Figure 5

**Youth Population  
Marion and Polk Counties, OR**



**Percentage of Youth (Age 17 and Under) by Block Group**

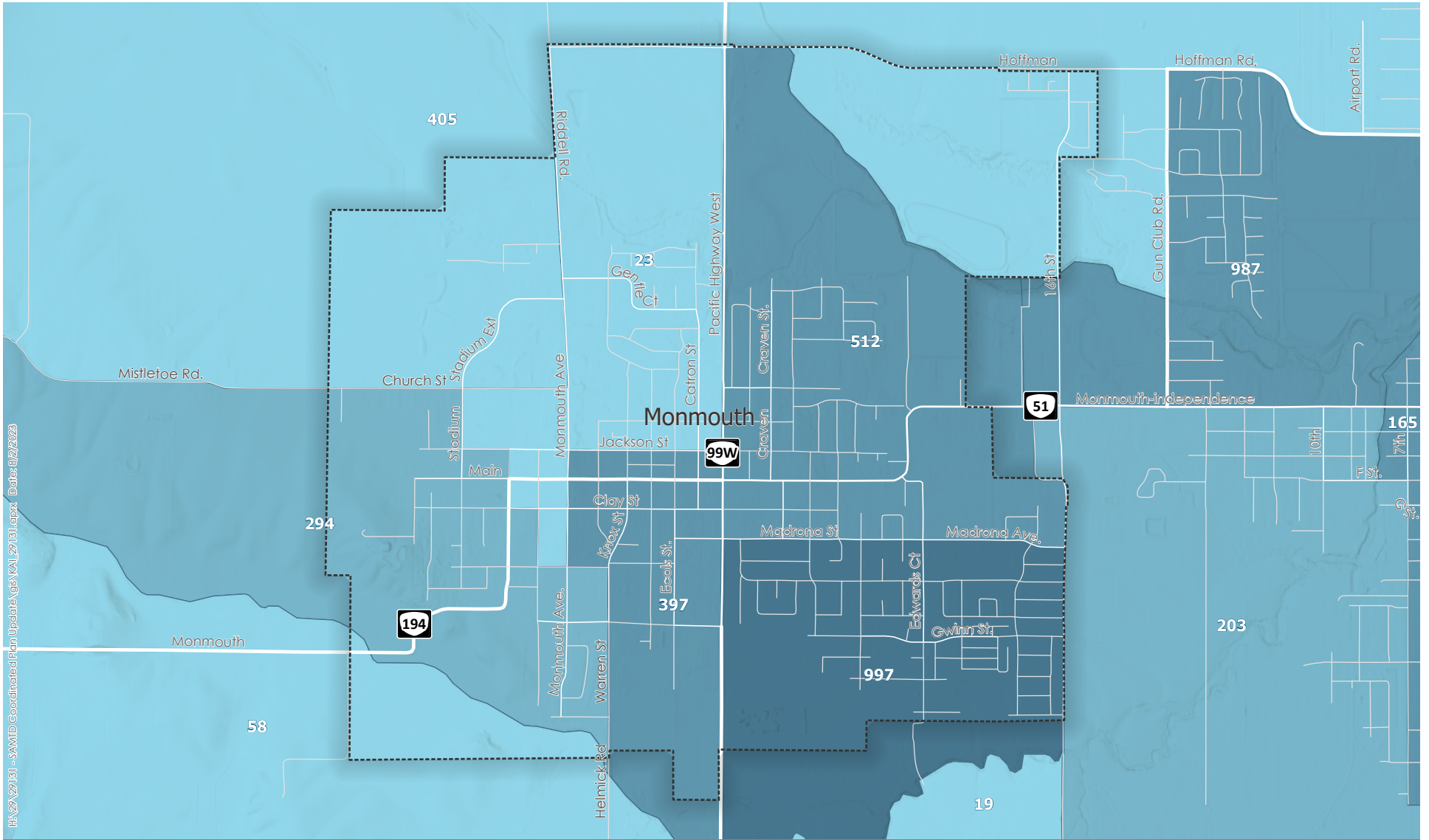
- 0% - 13%
- 14% - 23%
- 24% - 32%
- 33% - 44%

- County Boundary
- UGB



Figure 5

**Youth Population  
Dallas, OR**



**Percentage of Youth (Age 17 and Under) by Block Group**

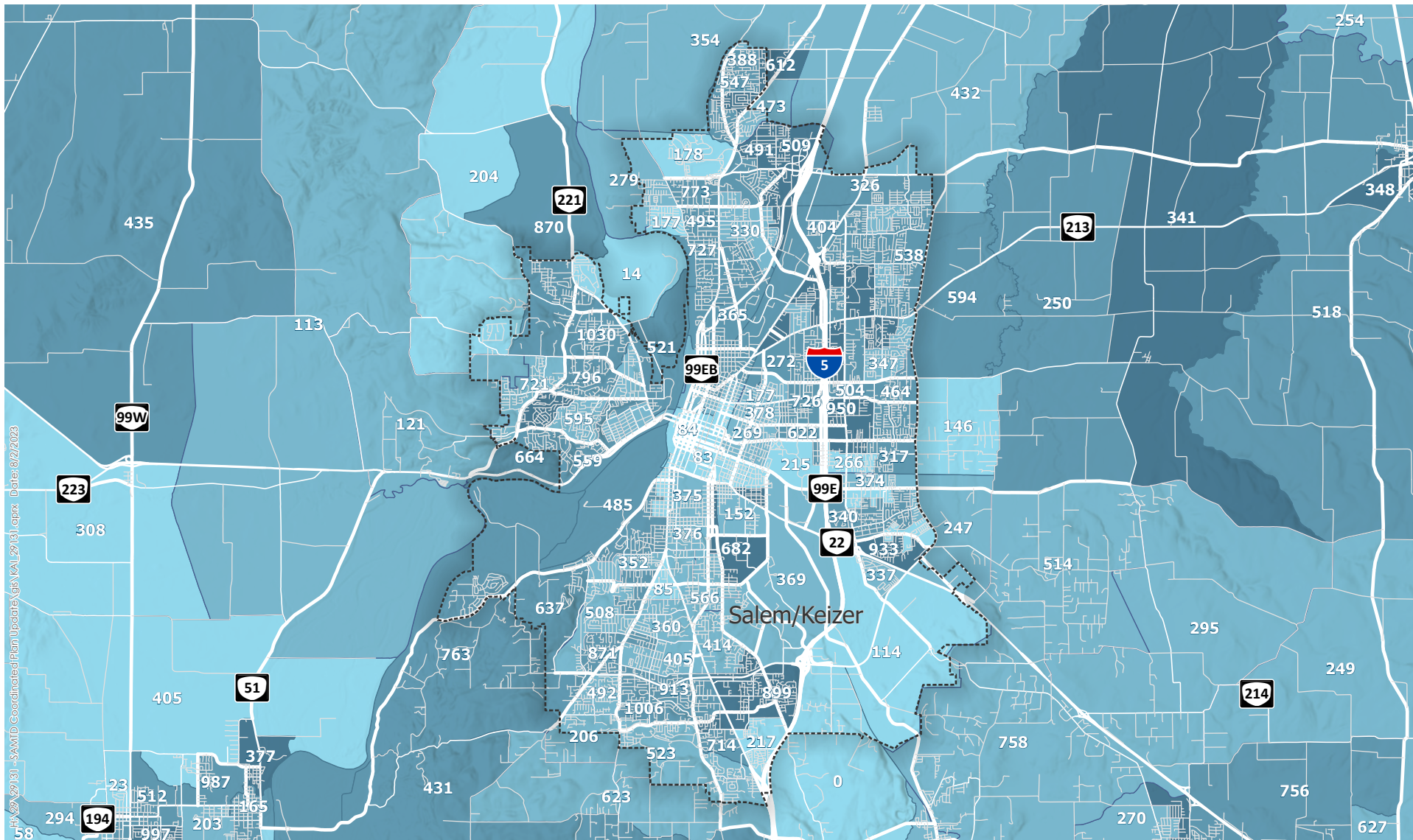
- 0% - 13%
- 14% - 23%
- 24% - 32%
- 33% - 44%

- County Boundary
- UGB



Figure 5

**Youth Population  
Monmouth, OR**



**Percentage of Youth (Age 17 and Under) by Block Group**

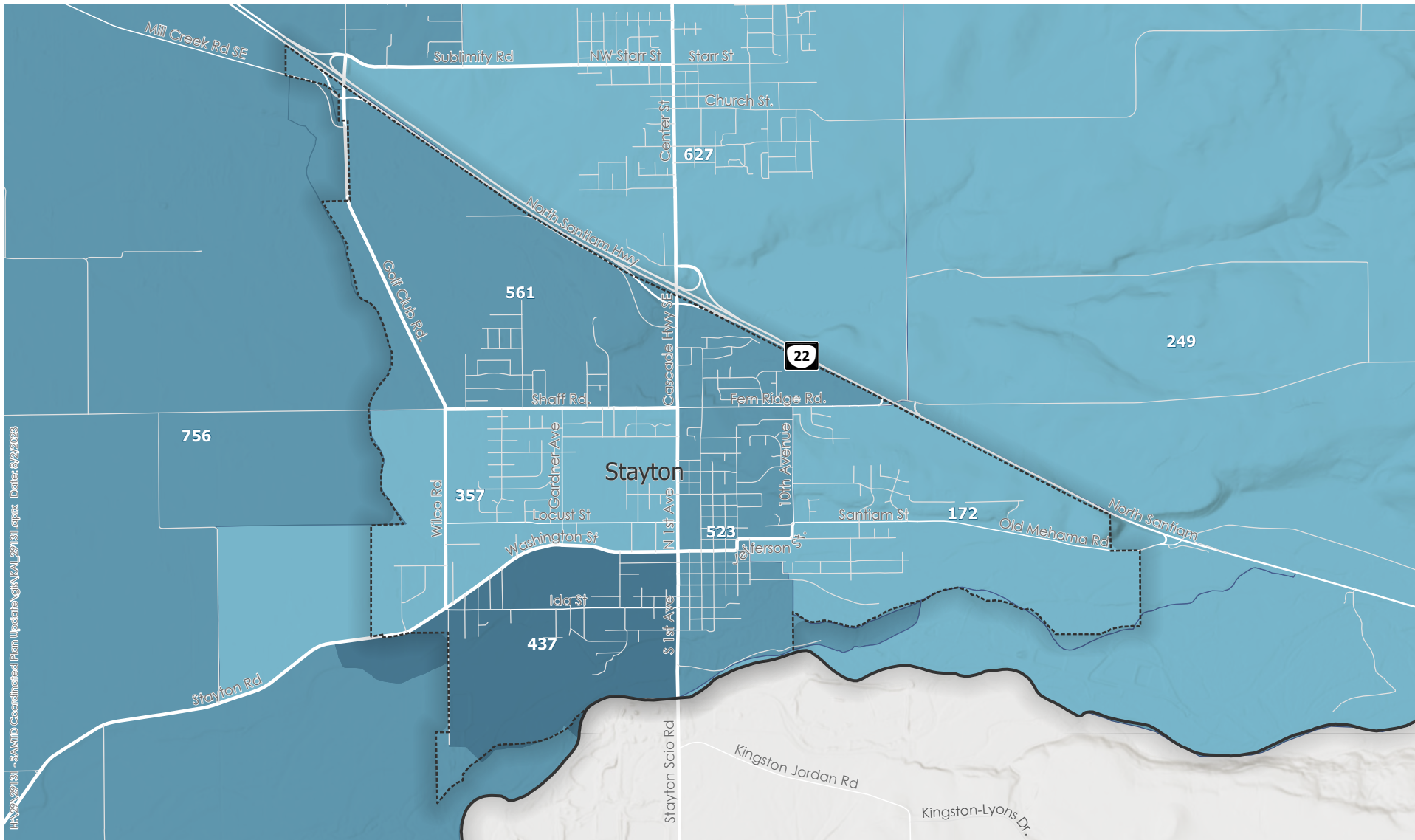
- 0% - 13%
- 14% - 23%
- 24% - 32%
- 33% - 44%

- County Boundary
- UGB



Figure 5

**Youth Population  
Salem/Keizer, OR**



**Percentage of Youth (Age 17 and Under) by Block Group**

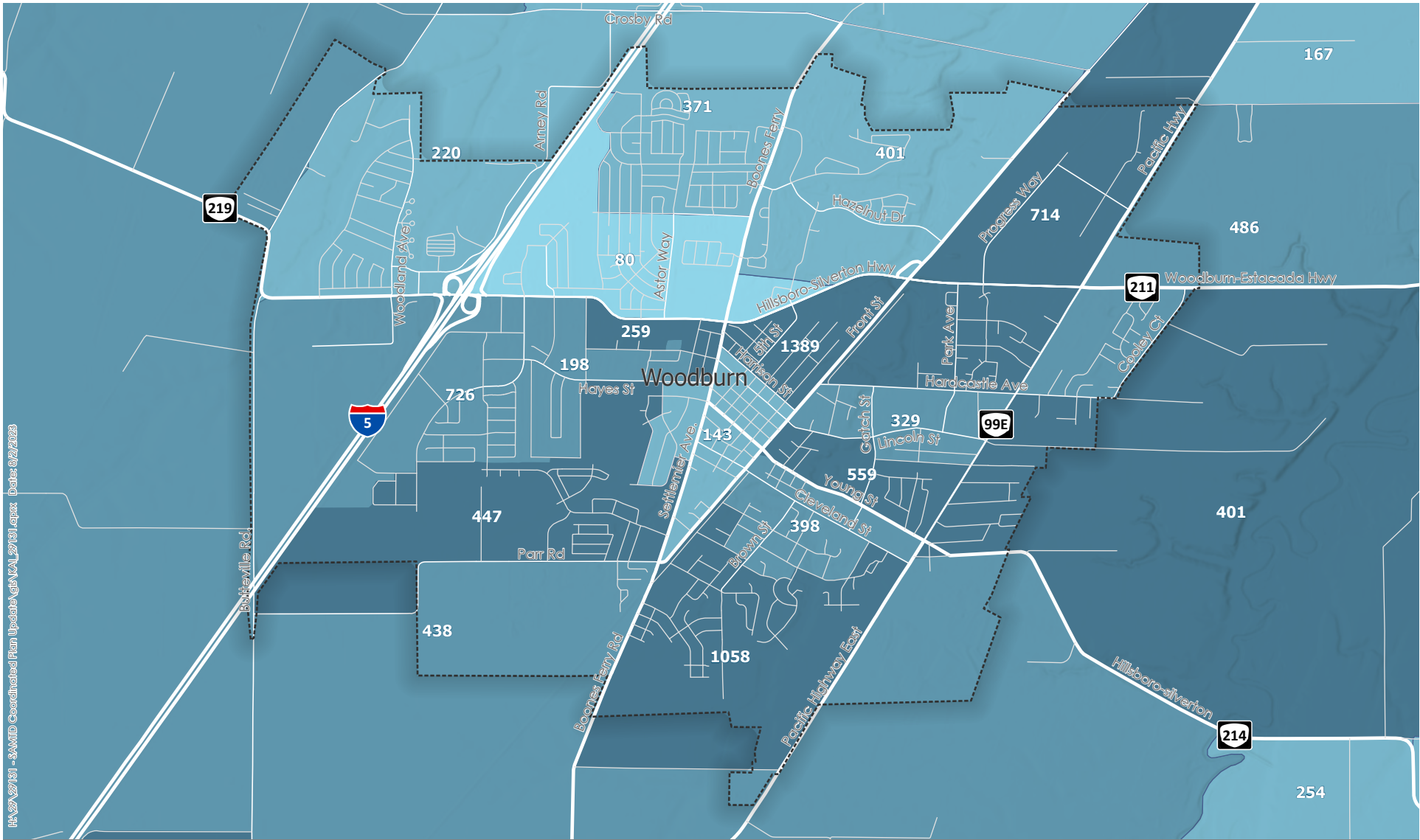
- 0% - 13%
- 14% - 23%
- 24% - 32%
- 33% - 44%

- County Boundary
- UGB



Figure 5

**Youth Population  
Stayton, OR**



H:\2024\_2028 - SAMID Coordinated Plan Update\GIS\Map\_2024\_2028.aprx Date: 8/2/2023

**Percentage of Youth (Age 17 and Under) by Block Group**

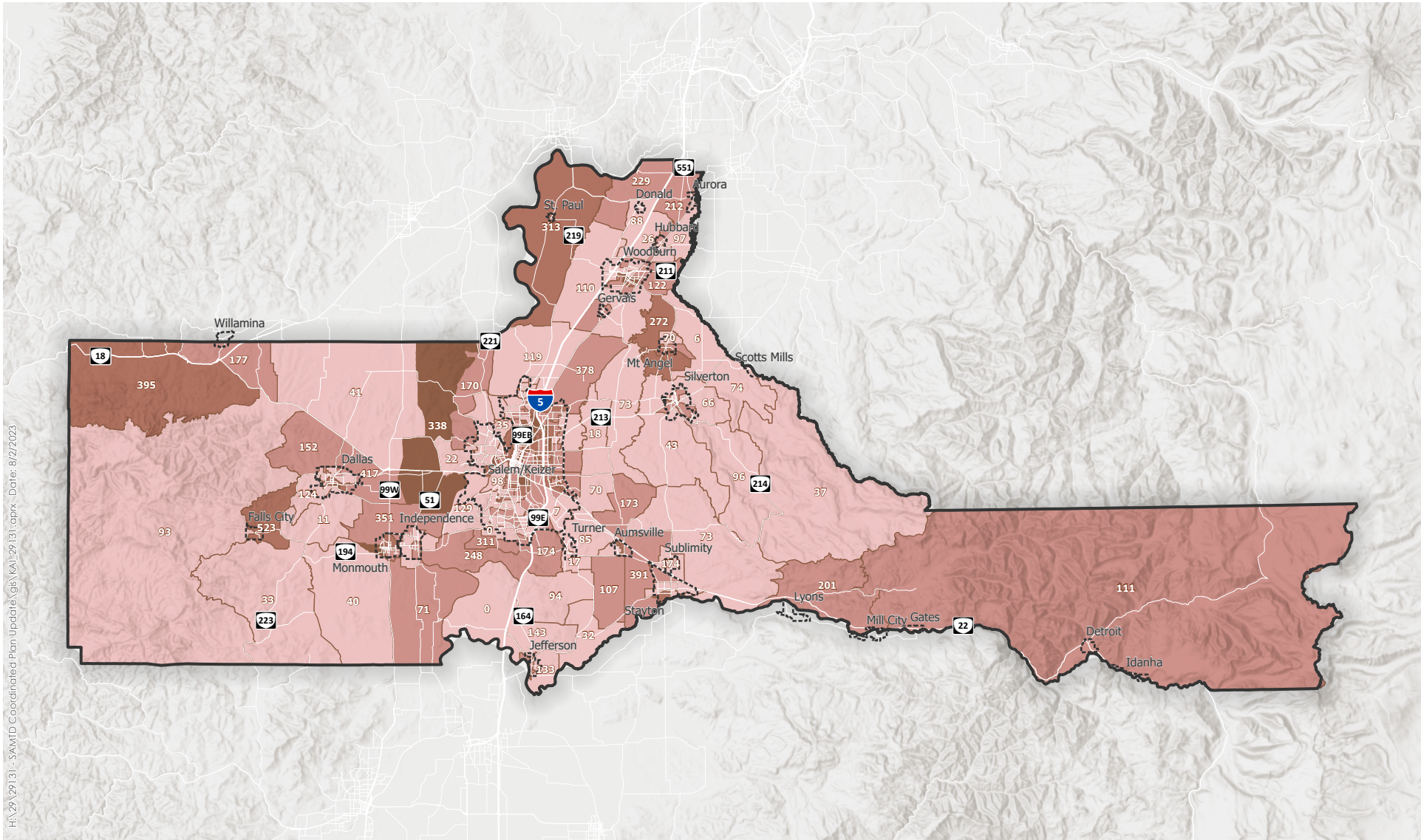
- 0% - 13%
- 14% - 23%
- 24% - 32%
- 33% - 44%

- County Boundary
- UGB







Figure 5

**Youth Population  
Woodburn, OR**



**Percentage of Population below 100% FPL by Block Group**

-  0% - 9%
-  9% - 20%
-  21% - 35%
-  35% - 63%



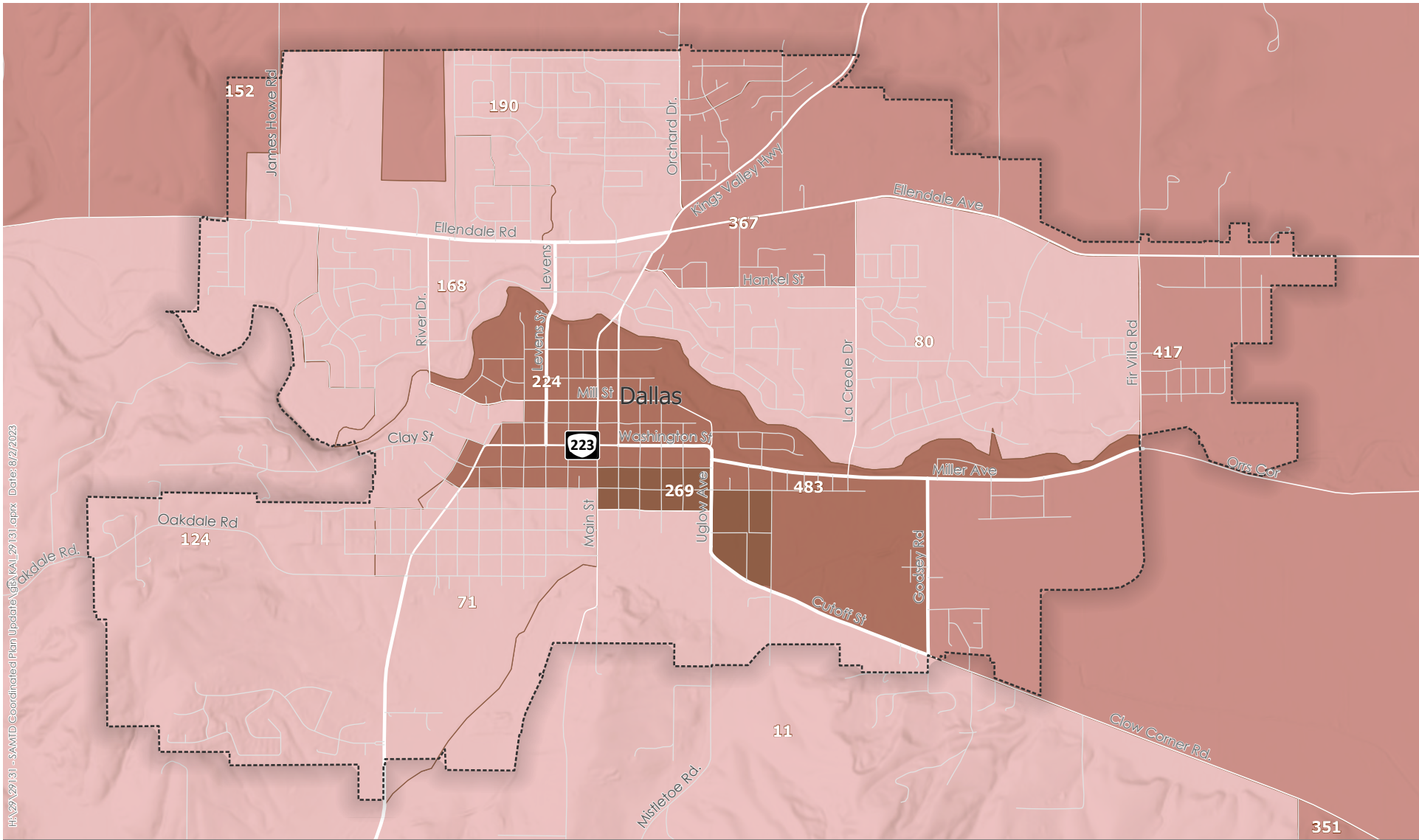
-  County Boundary
-  UGB



Figure 7

**Population Below 100% Poverty  
Marion and Polk Counties, OR**





**Percentage of Population below 100% FPL by Block Group**

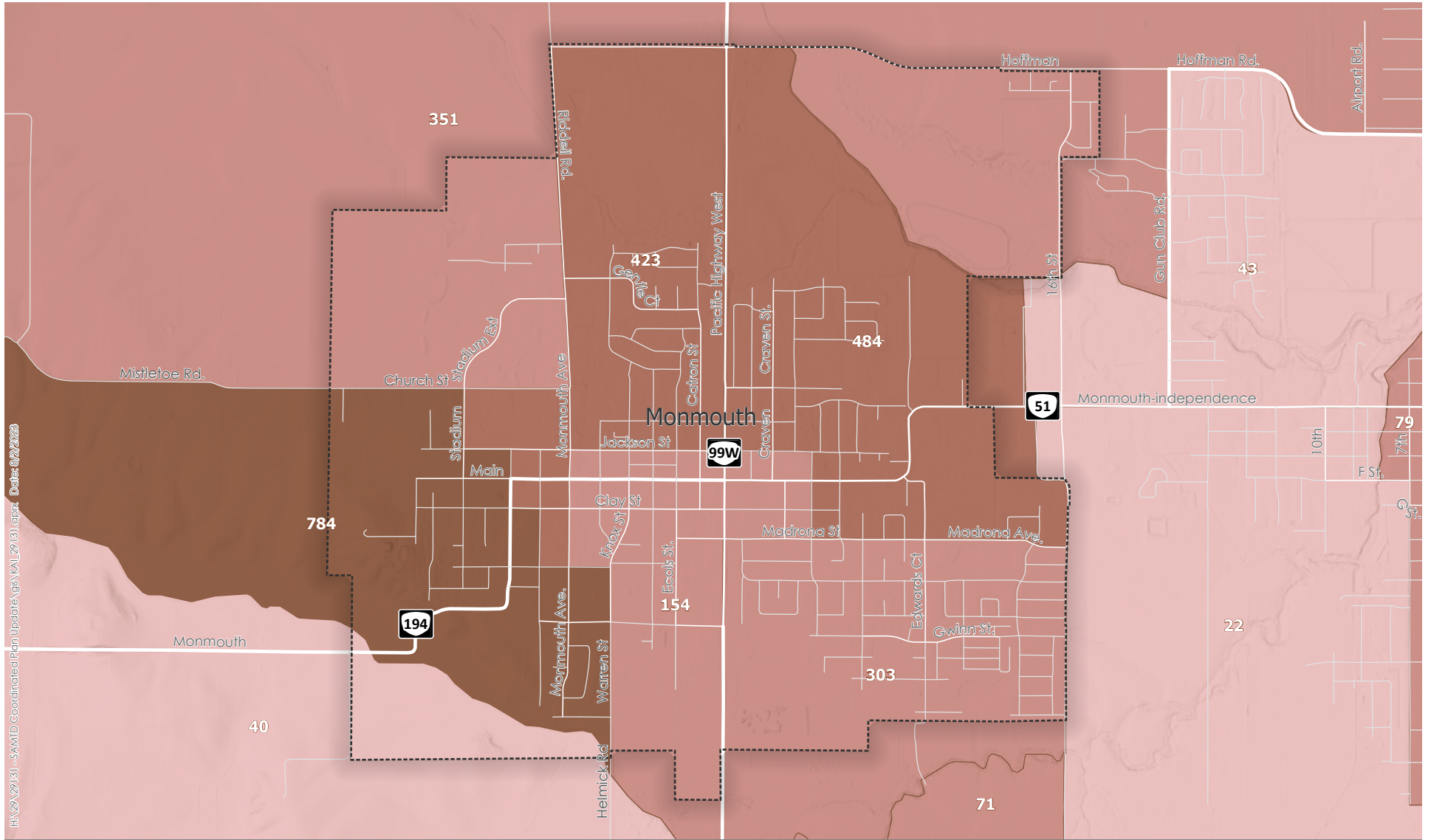
- 0% - 9%
- 9% - 20%
- 21% - 35%
- 35% - 63%

- County Boundary
- UGB



Figure 7

**Population Below 100% Poverty  
Dallas, OR**



H:\29\29131 - SAMTD Coordinated Plan Update\GIS\KAL\_29131.aprx Date: 8/2/2023

**Percentage of Population below 100% FPL by Block Group**

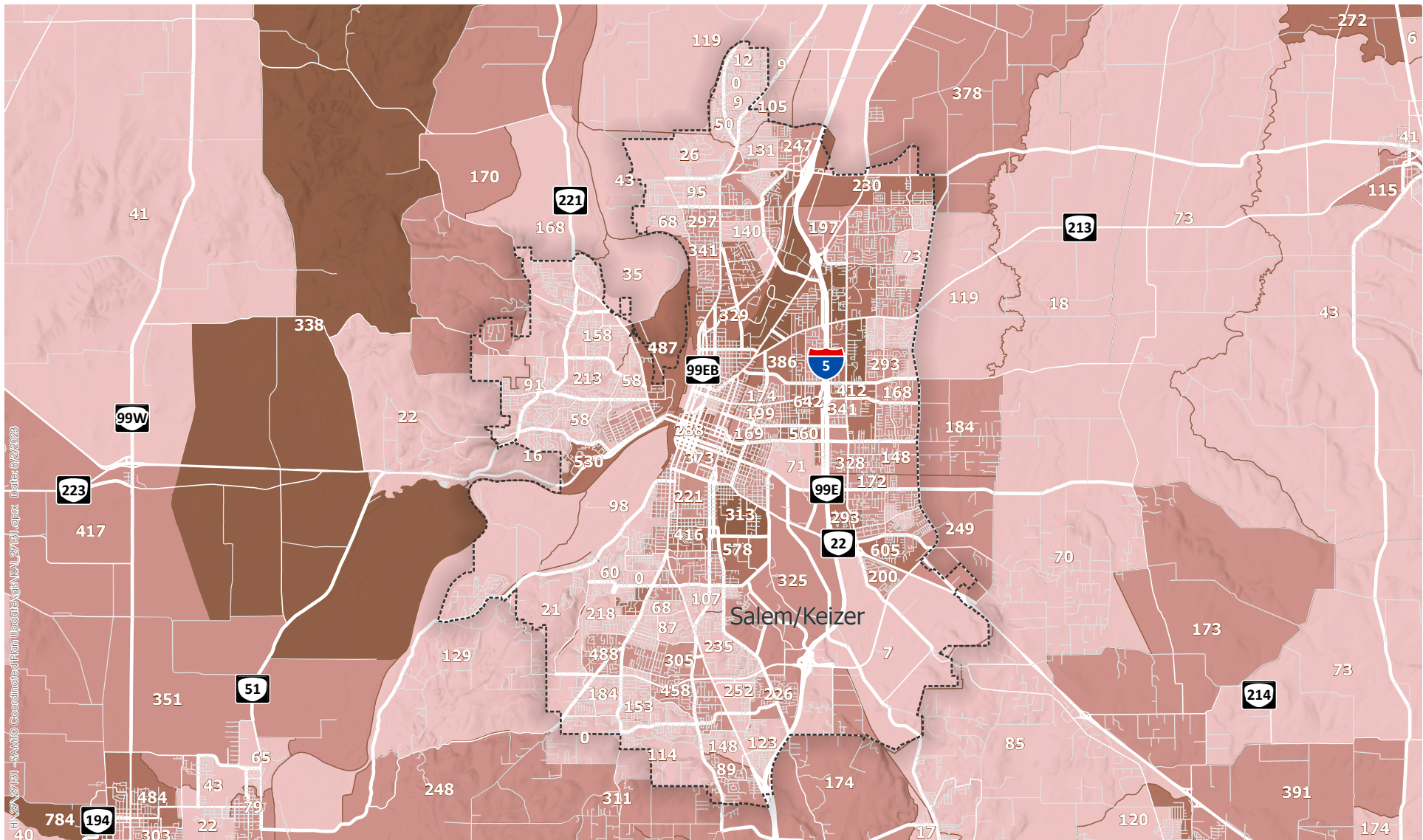
- 0% - 9%
- 9% - 20%
- 21% - 35%
- 35% - 63%

- County Boundary
- UGB



Figure 7

**Population Below 100% Poverty  
Monmouth, OR**



**Percentage of Population below 100% FPL by Block Group**

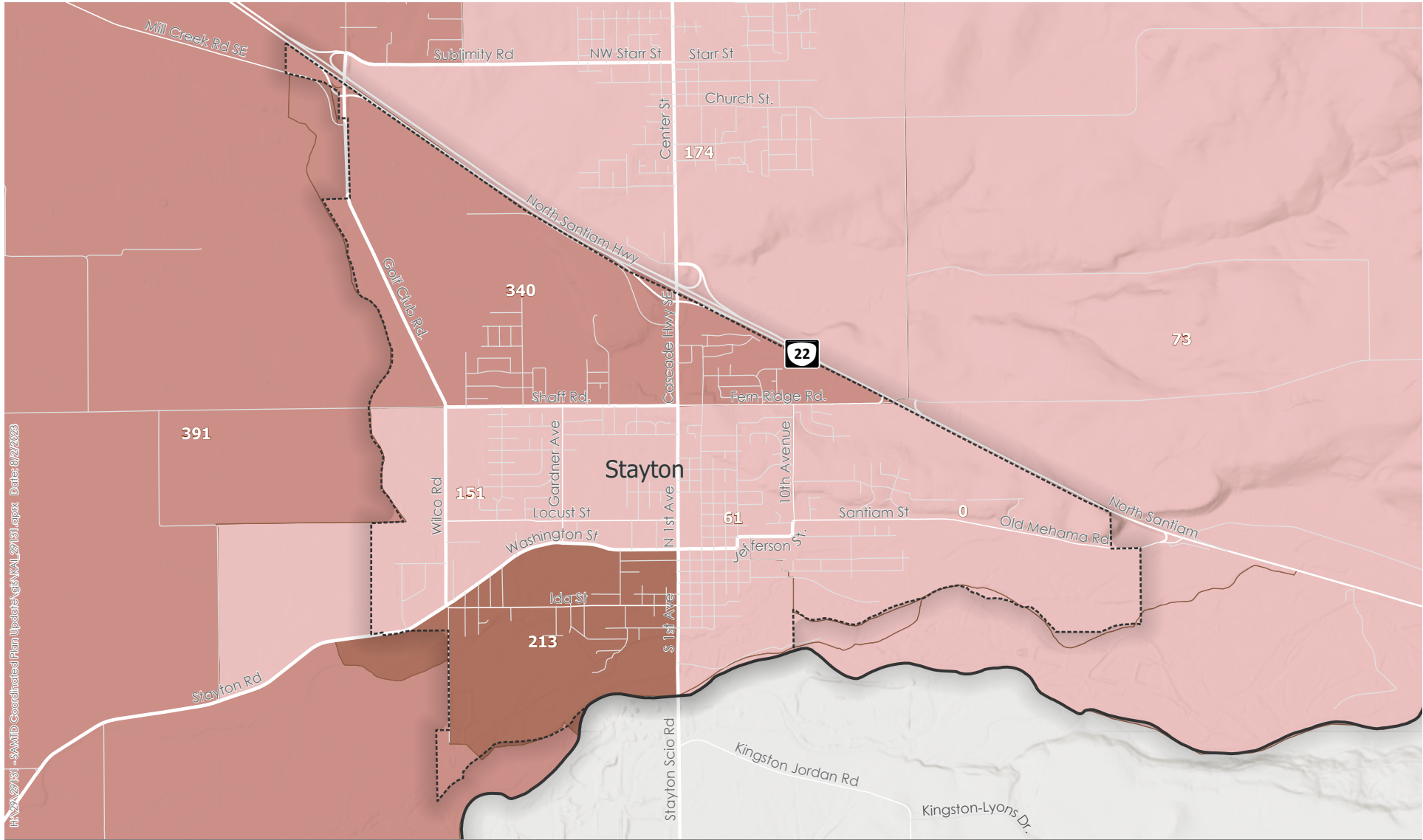
- 0% - 9%
- 9% - 20%
- 21% - 35%
- 35% - 63%

- County Boundary
- UGB



Figure 7

**Population Below 100% Poverty Salem/Keizer, OR**



**Percentage of Population below 100% FPL by Block Group**

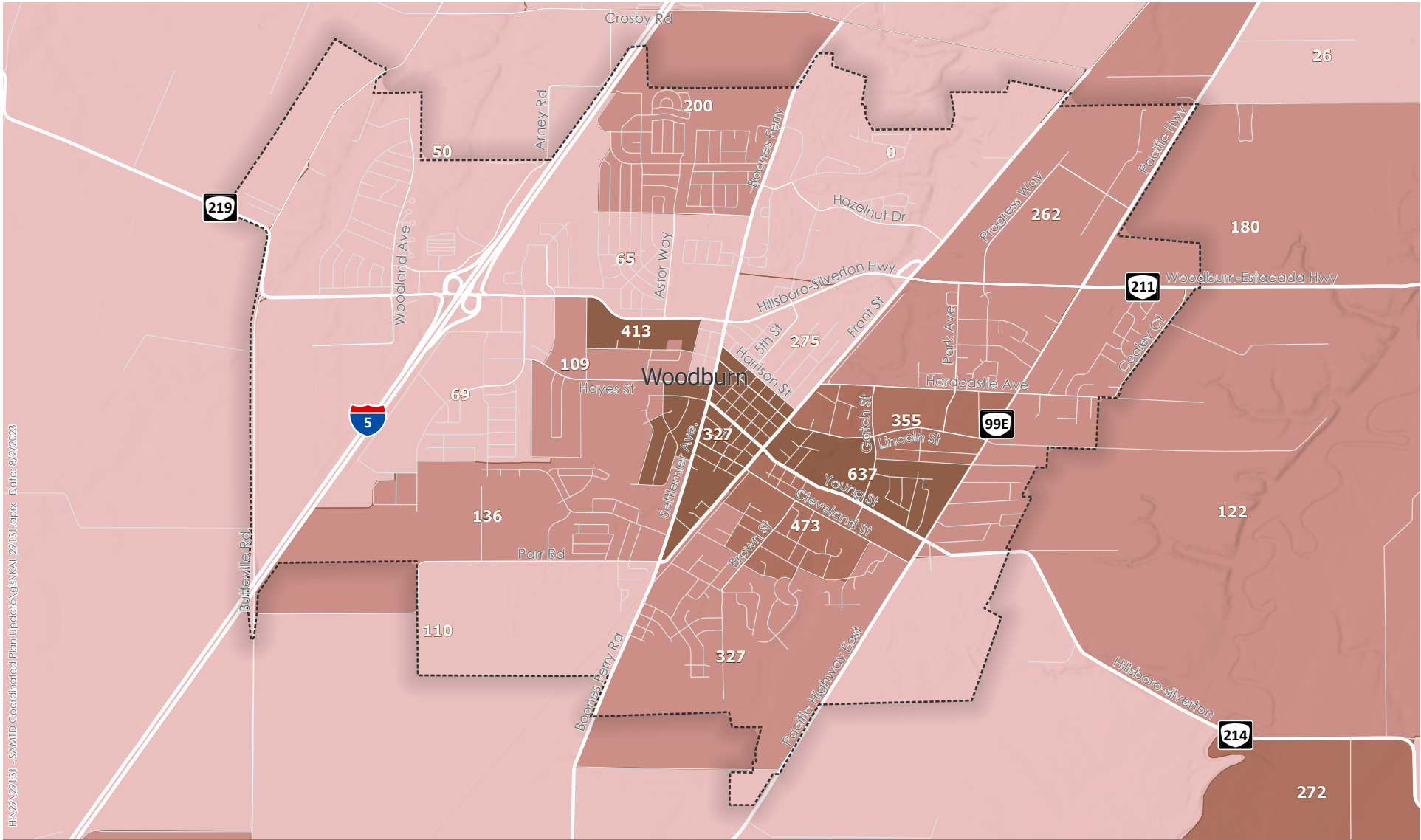
- 0% - 9%
- 9% - 20%
- 21% - 35%
- 35% - 63%

- County Boundary
- UGB







Figure 7

**Population Below 100% Poverty Stayton, OR**



**Percentage of Population below 100% FPL by Block Group**

-  0% - 9%
-  9% - 20%
-  21% - 35%
-  35% - 63%



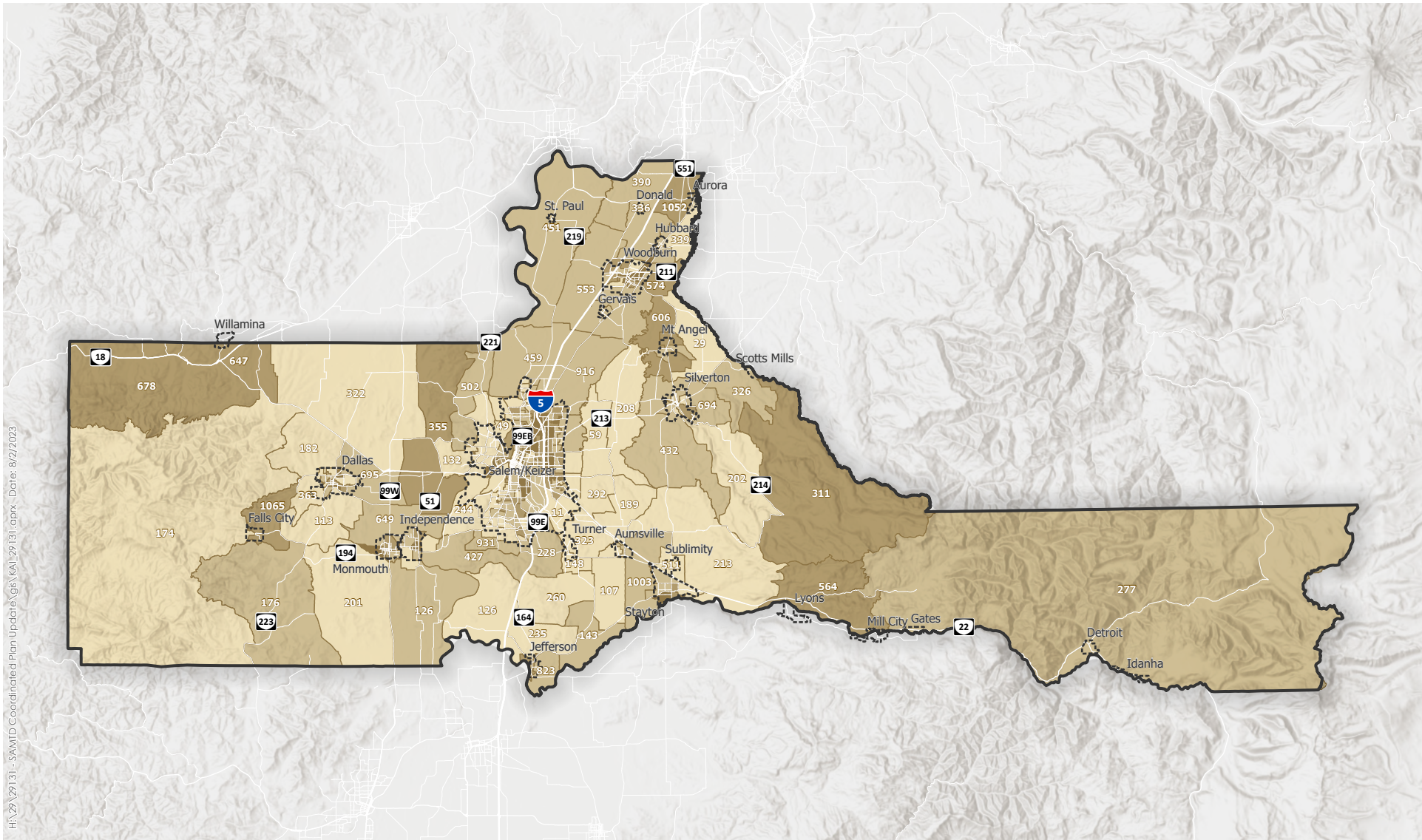
-  County Boundary
-  UGB







Figure 7

**Population Below 100% Poverty  
Woodburn, OR**



H:\29\29131 - SAMTD Coordinated Plan Update\GIS\KAL\_29131.aprx Date: 8/12/2023

**Percentage of Population Below 200% FPL by Block Group**

-  0% - 21%
-  21% - 37%
-  37% - 55%
-  55% - 78%



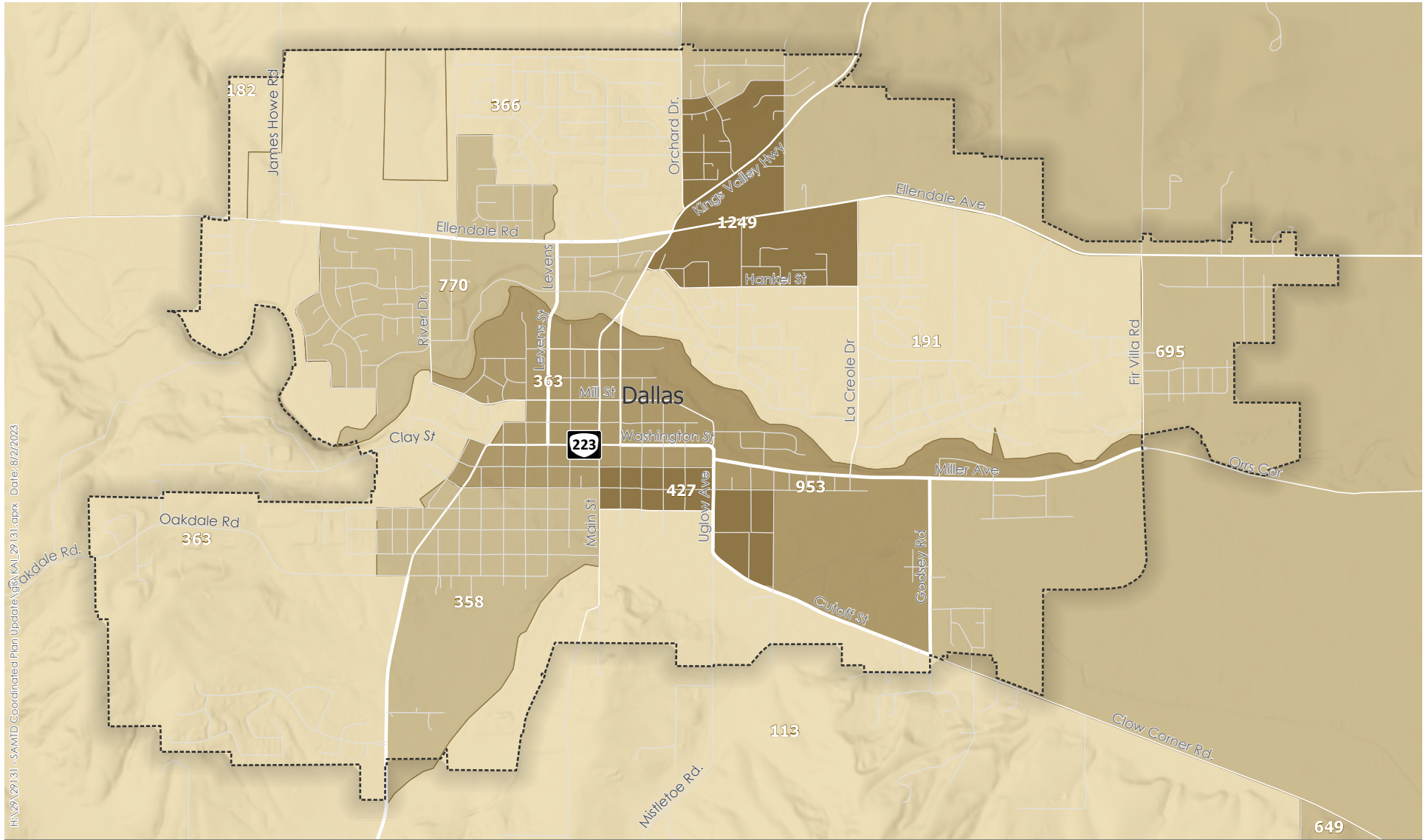
-  County Boundary
-  UGB







Figure 6

**Population Below 200% Poverty Marion and Polk Counties, OR**



**Percentage of Population Below 200% FPL by Block Group**

-  0% - 21%
-  21% - 37%
-  37% - 55%
-  55% - 78%



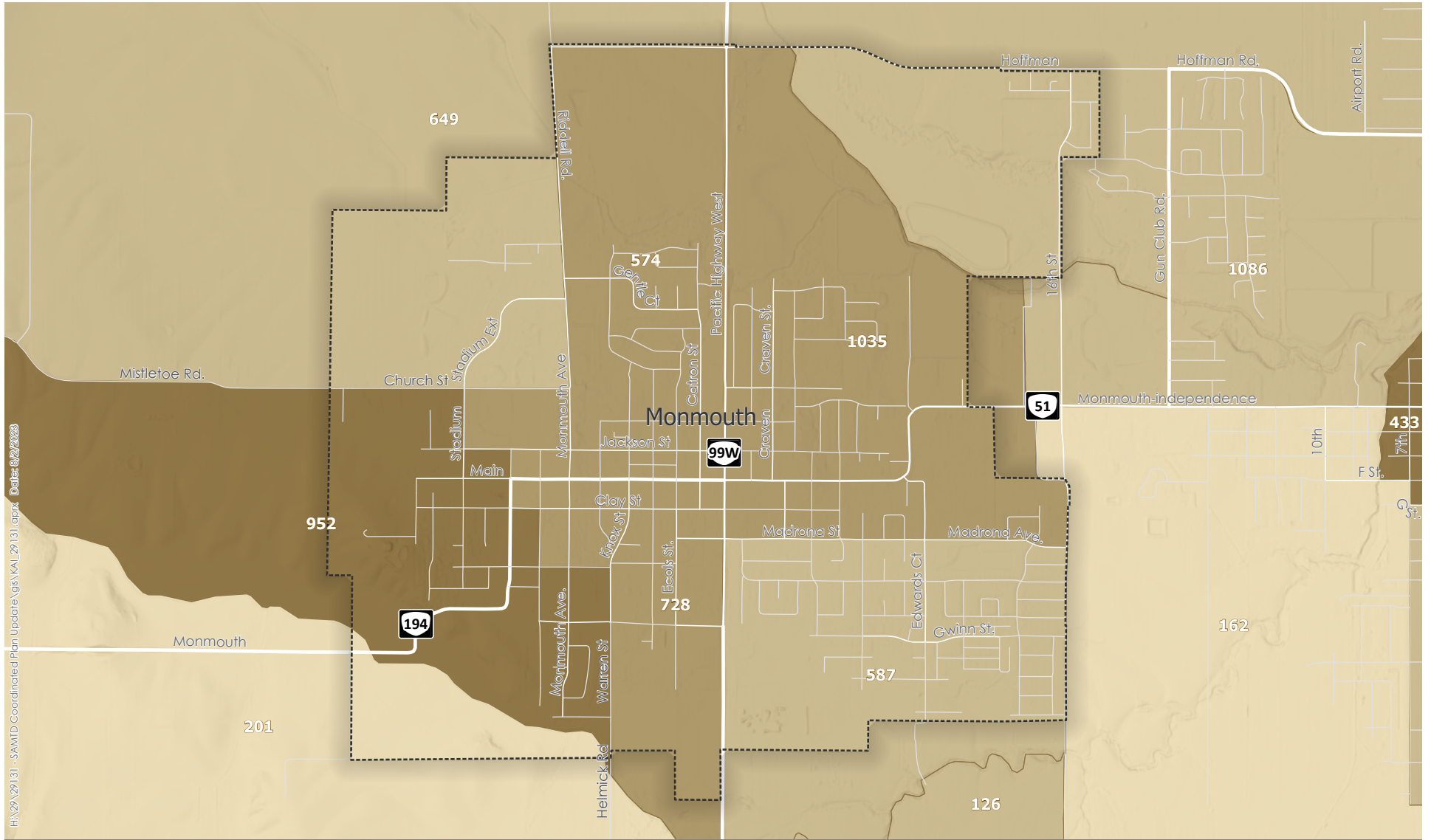
-  County Boundary
-  UGB







Figure 6

**Population Below 200% Poverty  
Dallas, OR**



**Percentage of Population Below 200% FPL by Block Group**

-  0% - 21%
-  21% - 37%
-  37% - 55%
-  55% - 78%



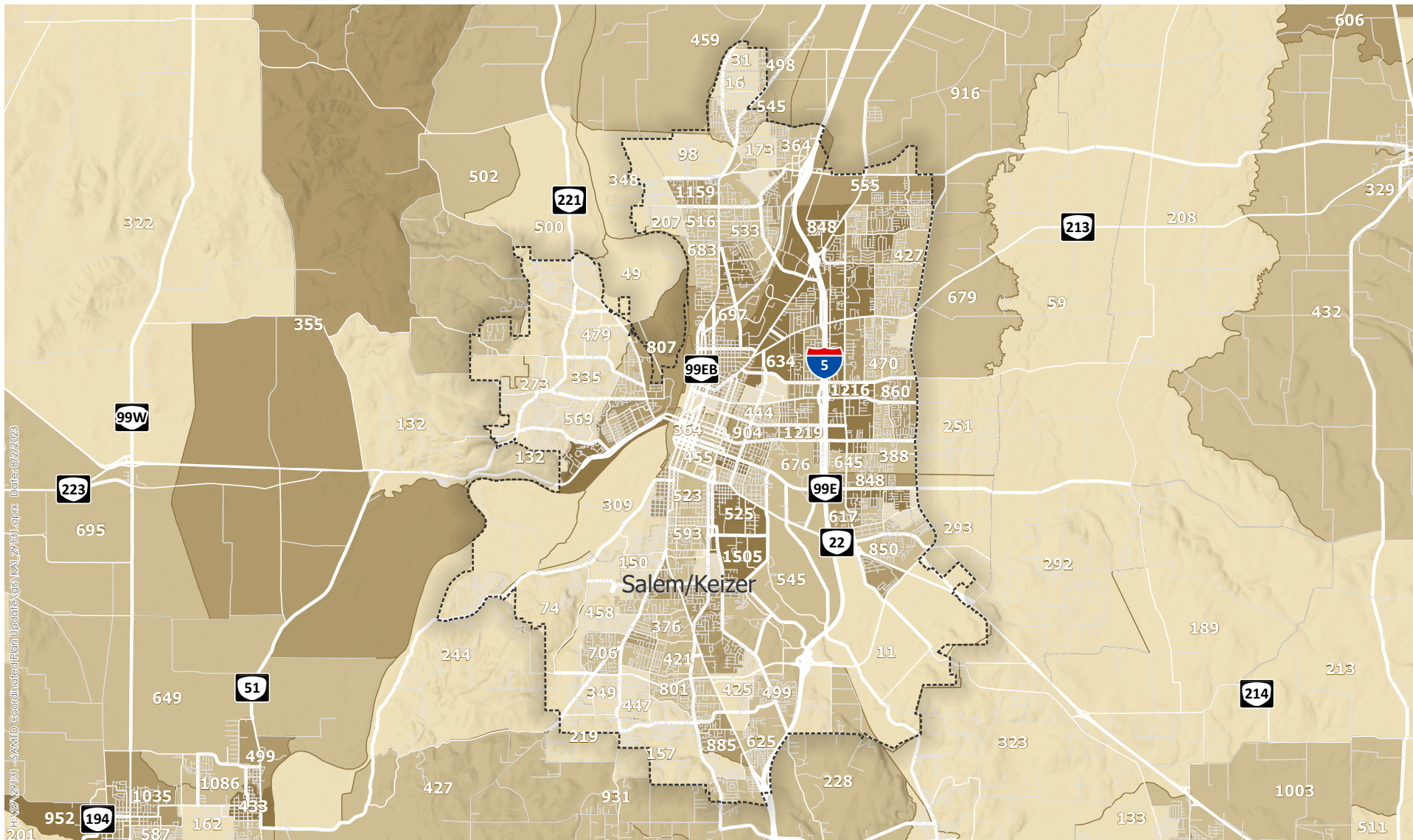
-  County Boundary
-  UGB







Figure 6

**Population Below 200% Poverty  
Monmouth, OR**





Percentage of Population Below 200% FPL by Block Group

-  0% - 21%
-  21% - 37%
-  37% - 55%
-  55% - 78%



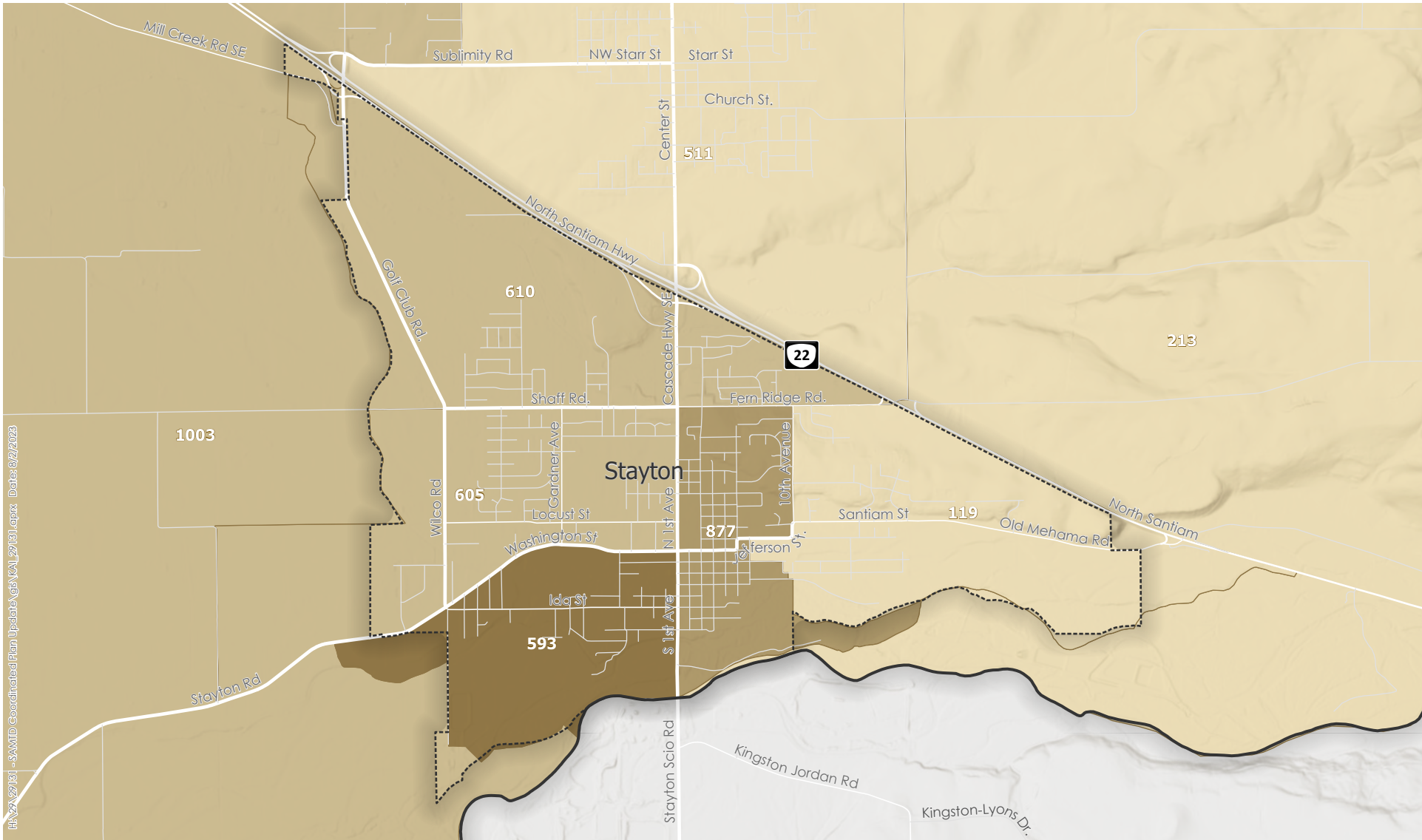
-  County Boundary
-  UGB



Figure 6

Population Below 200% Poverty  
Salem/Keizer, OR



**Percentage of Population Below 200% FPL by Block Group**

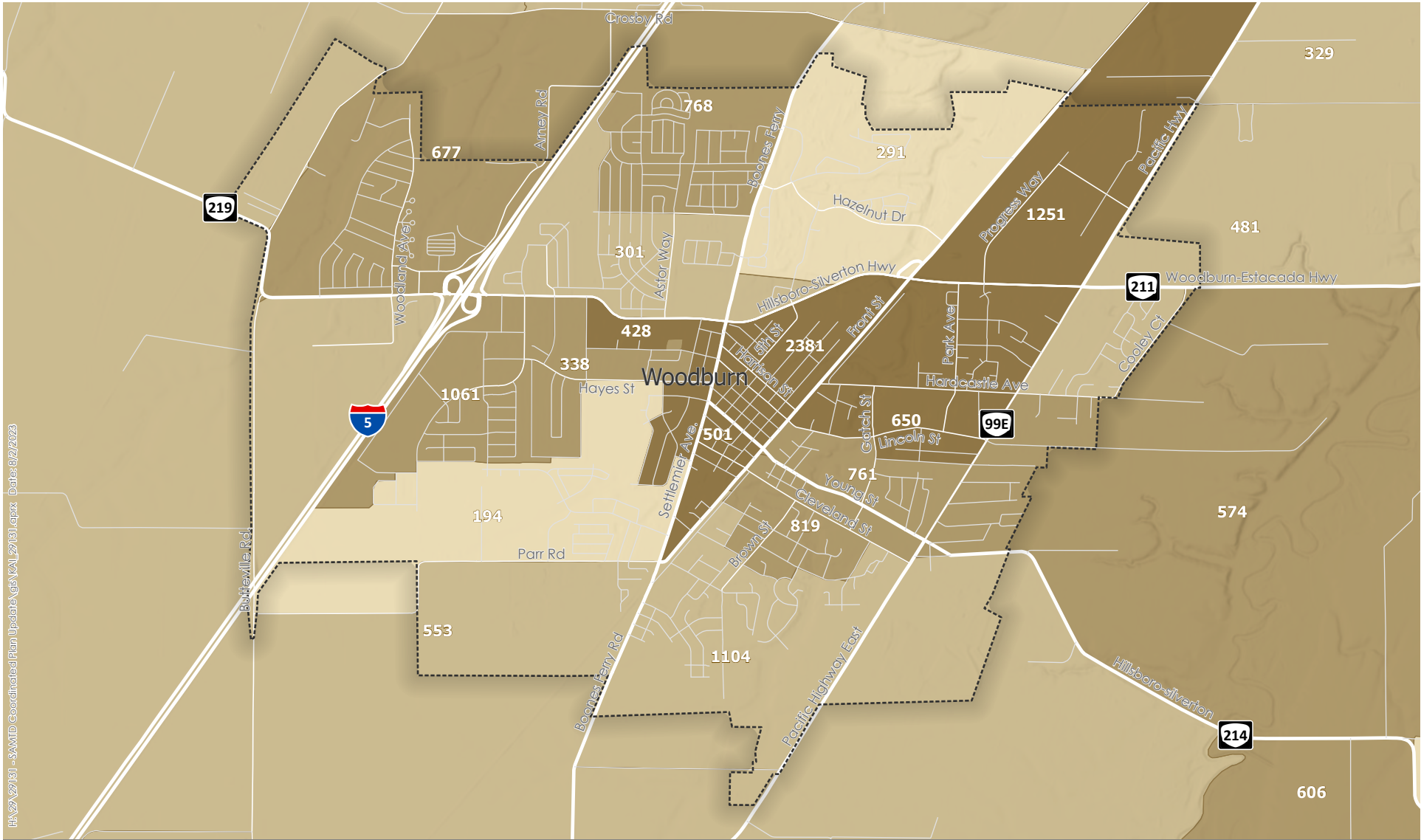
- 0% - 21%
- 21% - 37%
- 37% - 55%
- 55% - 78%

- County Boundary
- UGB







Figure 6

**Population Below 200% Poverty Stayton, OR**



**Percentage of Population Below 200% FPL by Block Group**

-  0% - 21%
-  21% - 37%
-  37% - 55%
-  55% - 78%



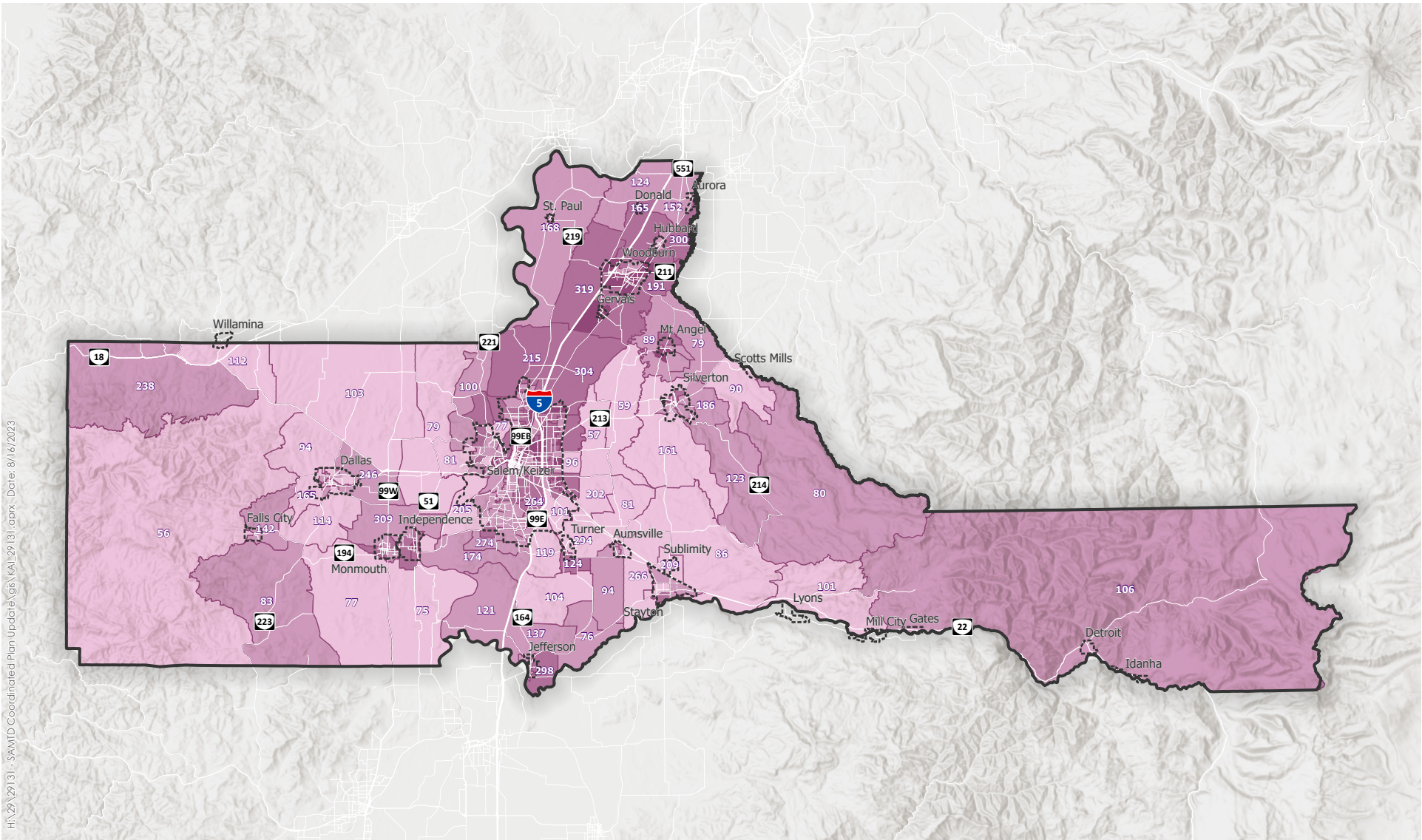
-  County Boundary
-  UGB







Figure 6

**Population Below 200% Poverty  
Woodburn, OR**



H:\29\29131 - SXM\TD Coordinated Plan Update\GIS\KAL 29131.aprx, Date: 8/16/2023

**Percentage of Population that is Non-White or Hispanic by Block Group**

-  3% - 9%
-  10% - 12%
-  13% - 16%
-  17% - 24%



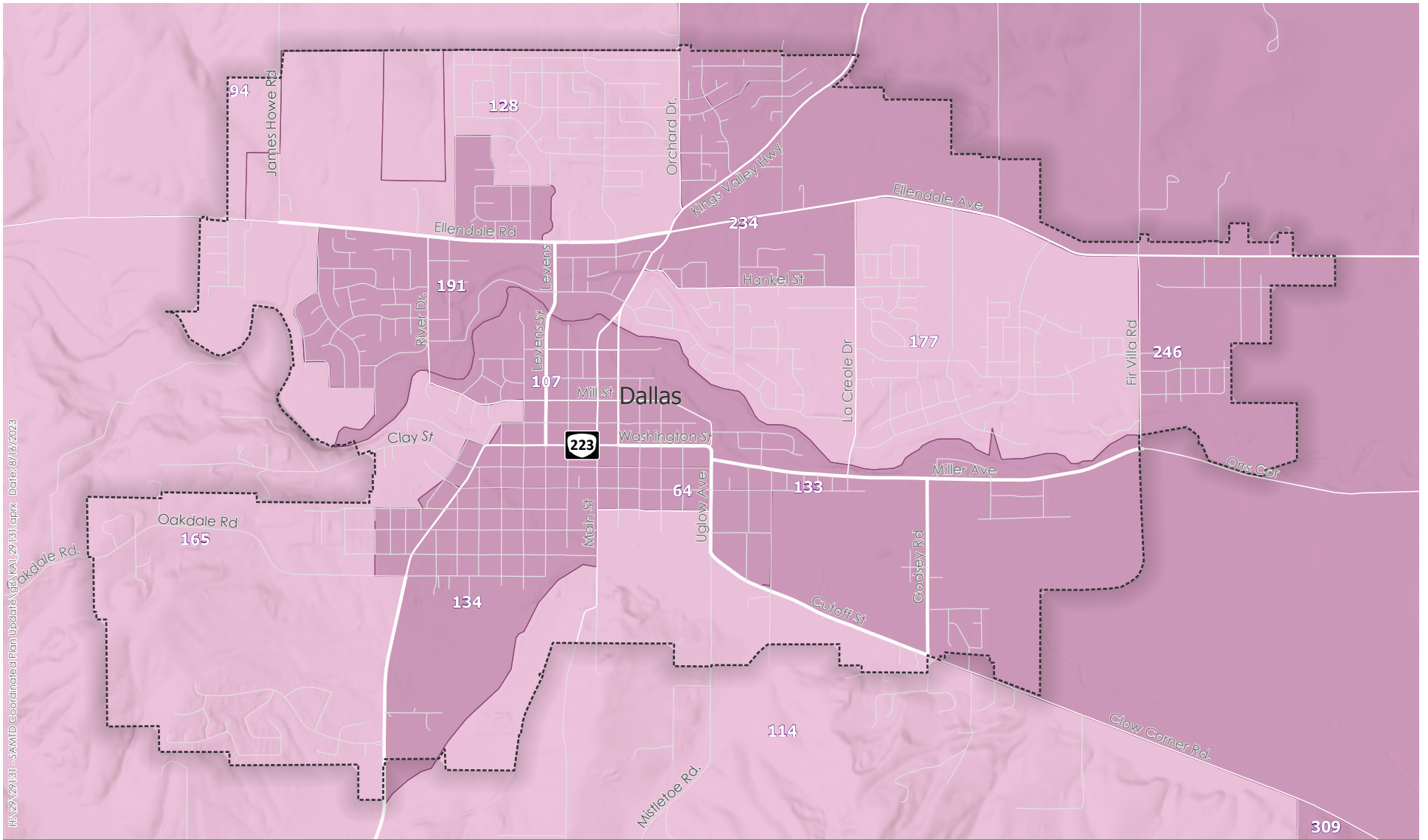
-  County Boundary
-  UGB



Figure 8

**Non-White Population  
Marion and Polk Counties, OR**



H:\23\29131 - SAMTD Coordinated Plan Update\GIS\KAL 29131.aprx Date: 8/16/2023

**Percentage of Population that is Non-White or Hispanic by Block Group**

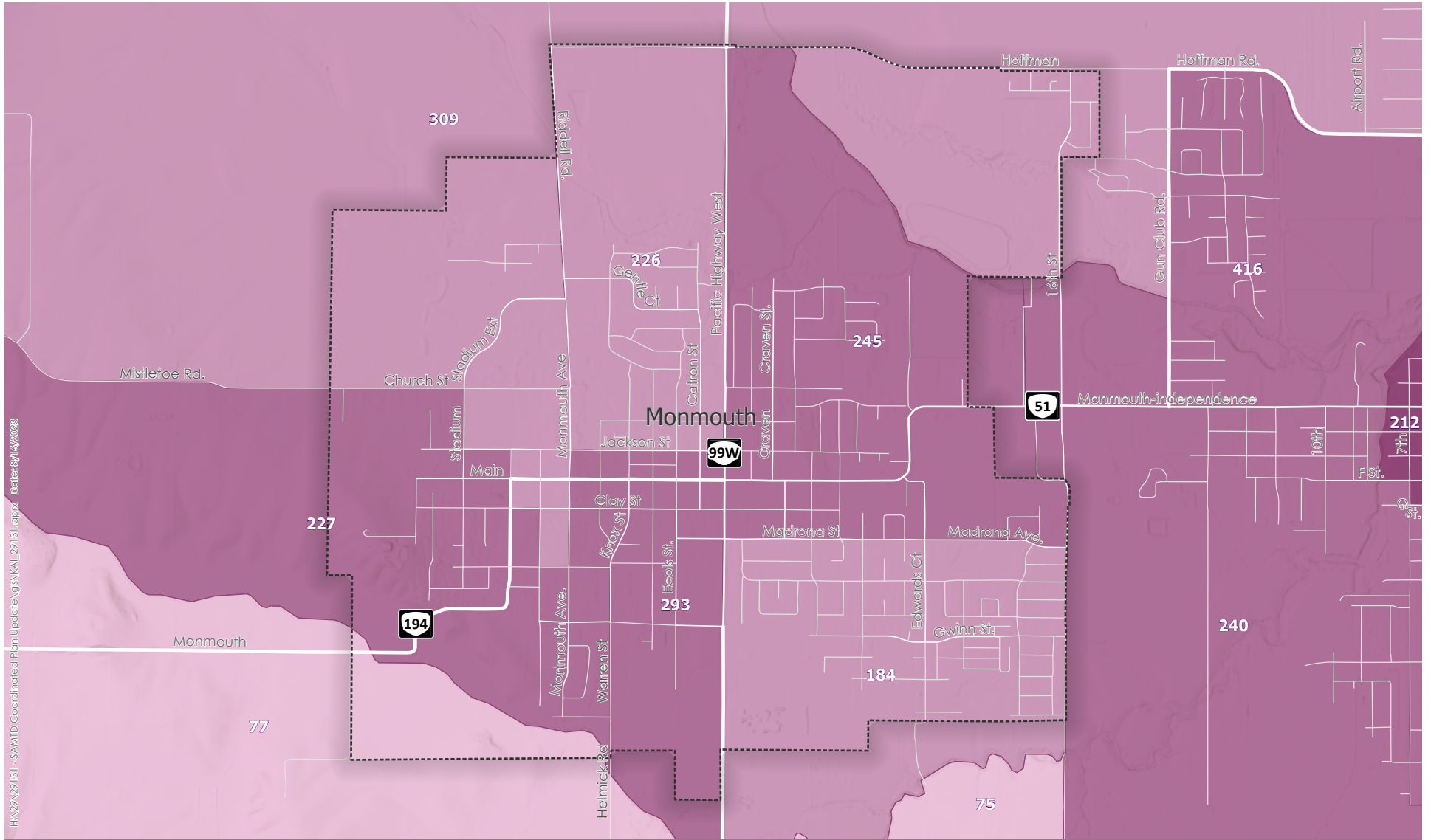
- 3% - 9%
- 10% - 12%
- 13% - 16%
- 17% - 24%

- County Boundary
- UGB



Figure 8

**Non-White Population  
Dallas, OR**



**Percentage of Population that is Non-White or Hispanic by Block Group**

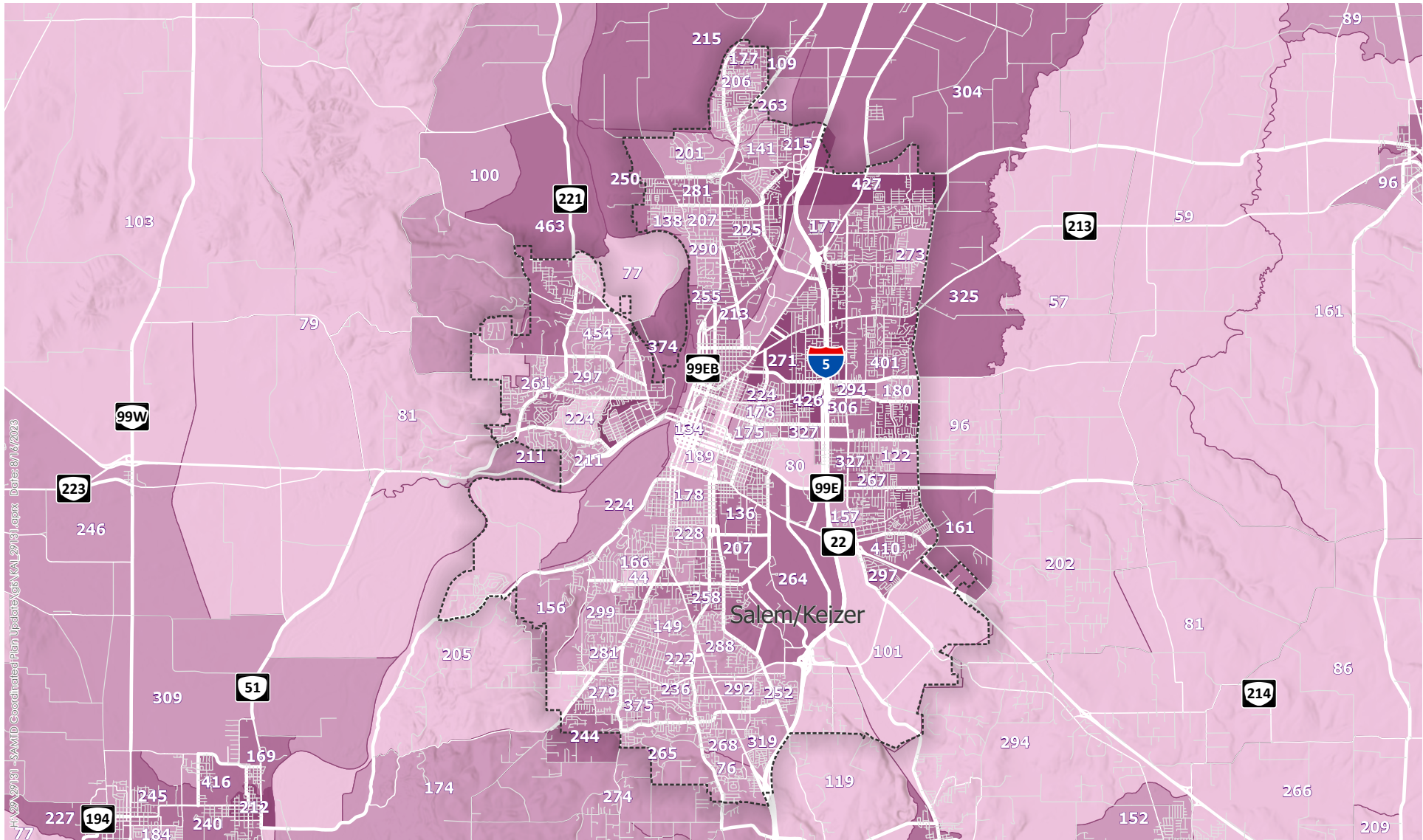
- 3% - 9%
- 10% - 12%
- 13% - 16%
- 17% - 24%

- County Boundary
- UGB



Figure 8

**Non-White Population  
Monmouth, OR**



Percentage of Population that is Non-White or Hispanic by Block Group

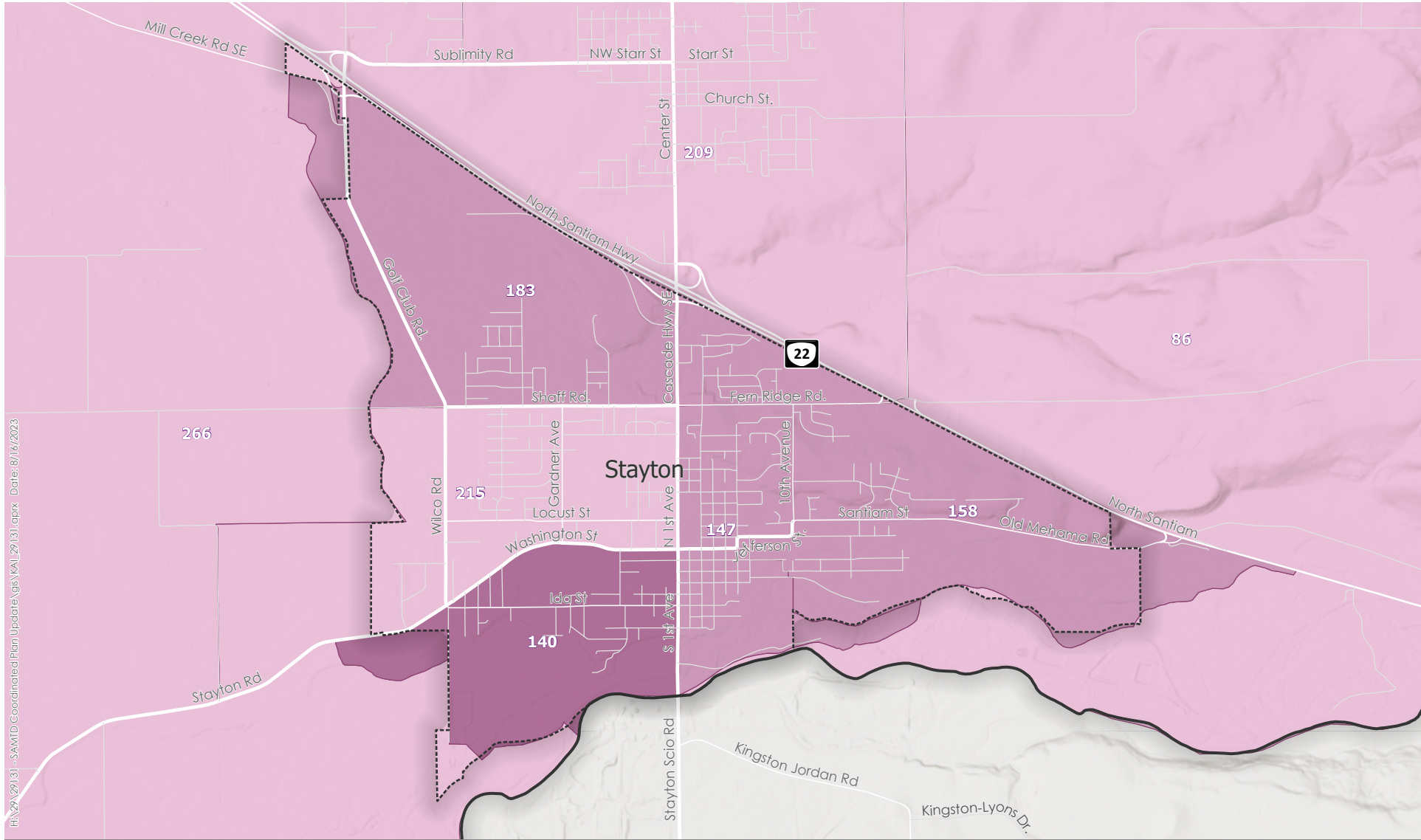
- 3% - 9%
- 10% - 12%
- 13% - 16%
- 17% - 24%

- County Boundary
- UGB



Figure 8

**Non-White Population  
Salem/Keizer, OR**



**Percentage of Population that is Non-White or Hispanic by Block Group**

- 3% - 9%
- 10% - 12%
- 13% - 16%
- 17% - 24%

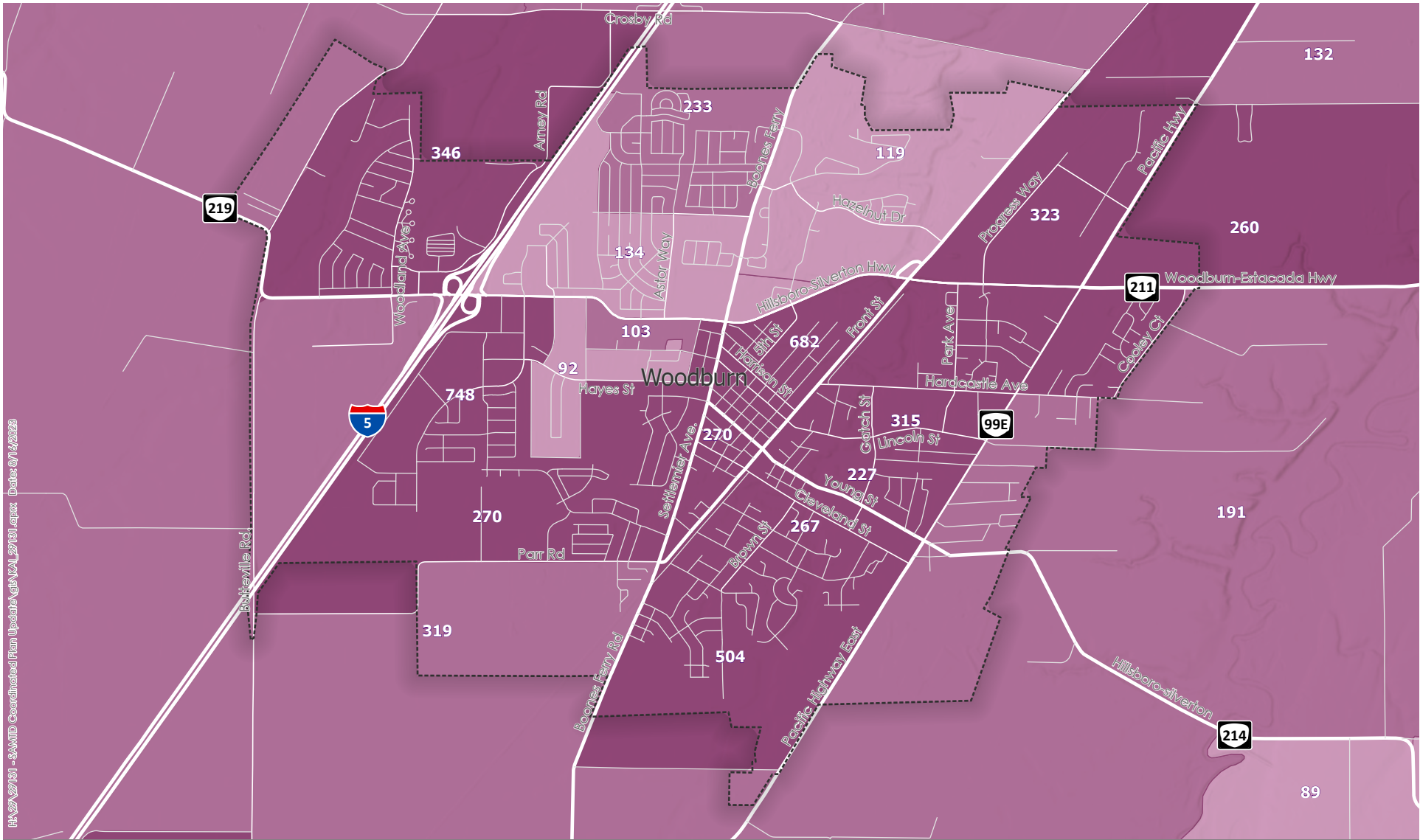
- County Boundary
- UGB



Figure 8





**Non-White Population Stayton, OR**





H:\2021\2021 - SAMID Coordinated Plan Update\GIS\Map\_2021.aprx Date: 8/14/2023

**Percentage of Population that is Non-White or Hispanic by Block Group**

-  3% - 9%
-  10% - 12%
-  13% - 16%
-  17% - 24%



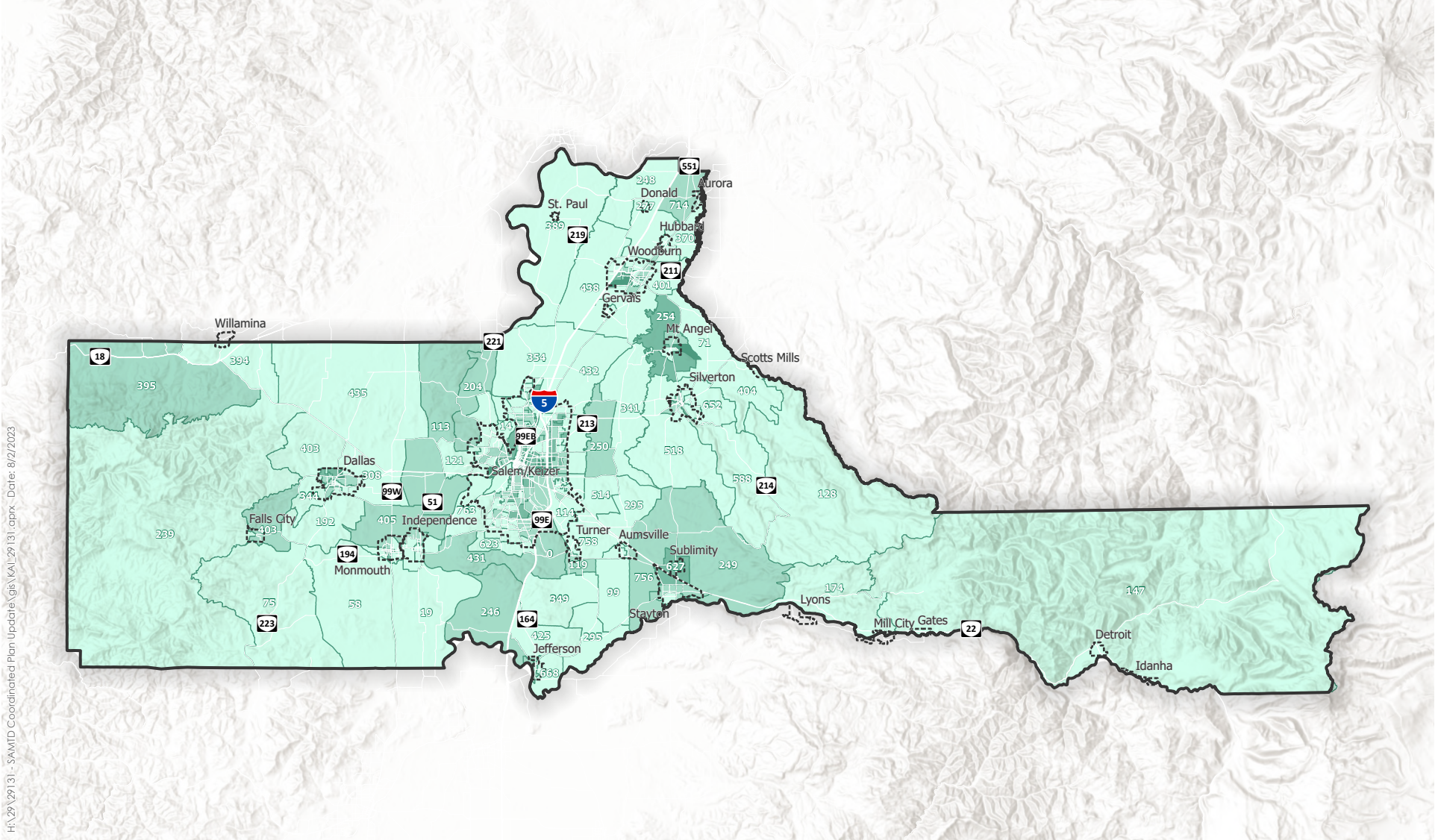
-  County Boundary
-  UGB



Figure 8

**Non-White Population  
Woodburn, OR**



H:\29\29131 - SAMTD Coordinated Plan Update\GIS\KAL\29131.aprx Date: 8/12/2023

**Percentage of Households without a Vehicle**

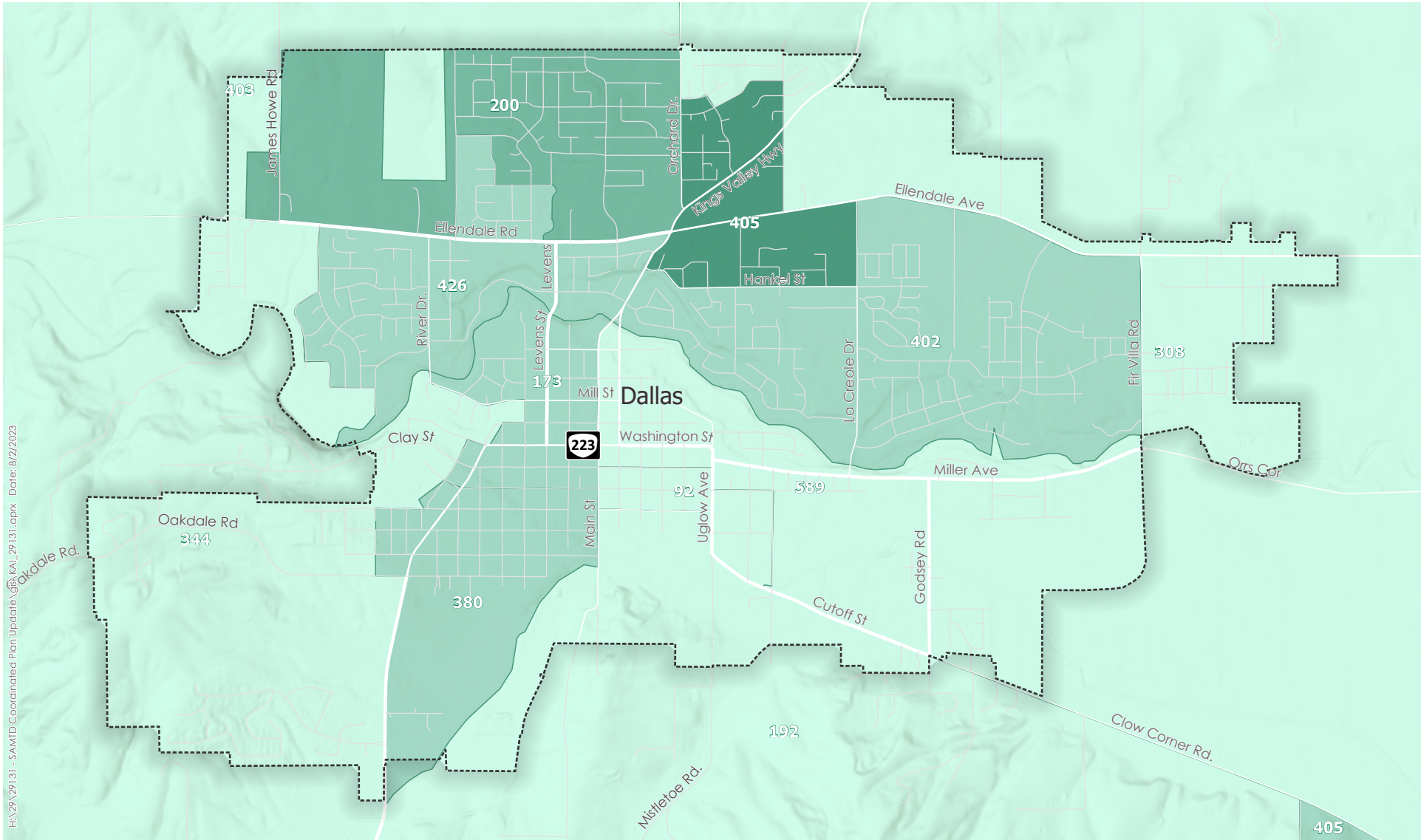
- 0% - 3%
- 4% - 10%
- 11% - 20%
- 21% - 38%

- County Boundary
- UGB



Figure 9

**Zero Vehicle Households  
Marion and Polk Counties, OR**



**Percentage of Households without a Vehicle**

- 0% - 3%
- 4% - 10%
- 11% - 20%
- 21% - 38%

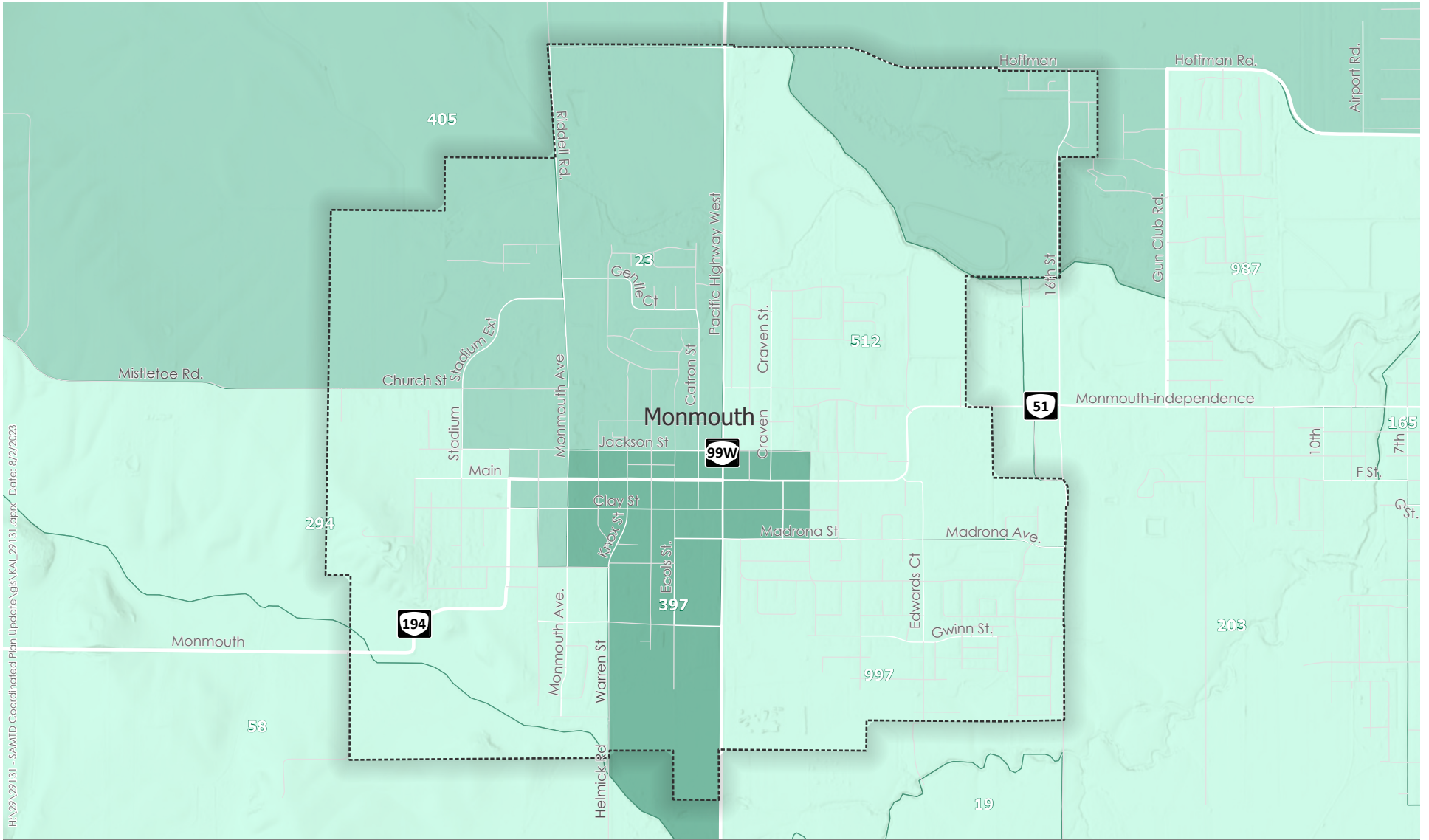
- County Boundary
- UGB

0 0.9 Miles



Figure 9

**Zero Vehicle Households  
Dallas, OR**



**Percentage of Households without a Vehicle**

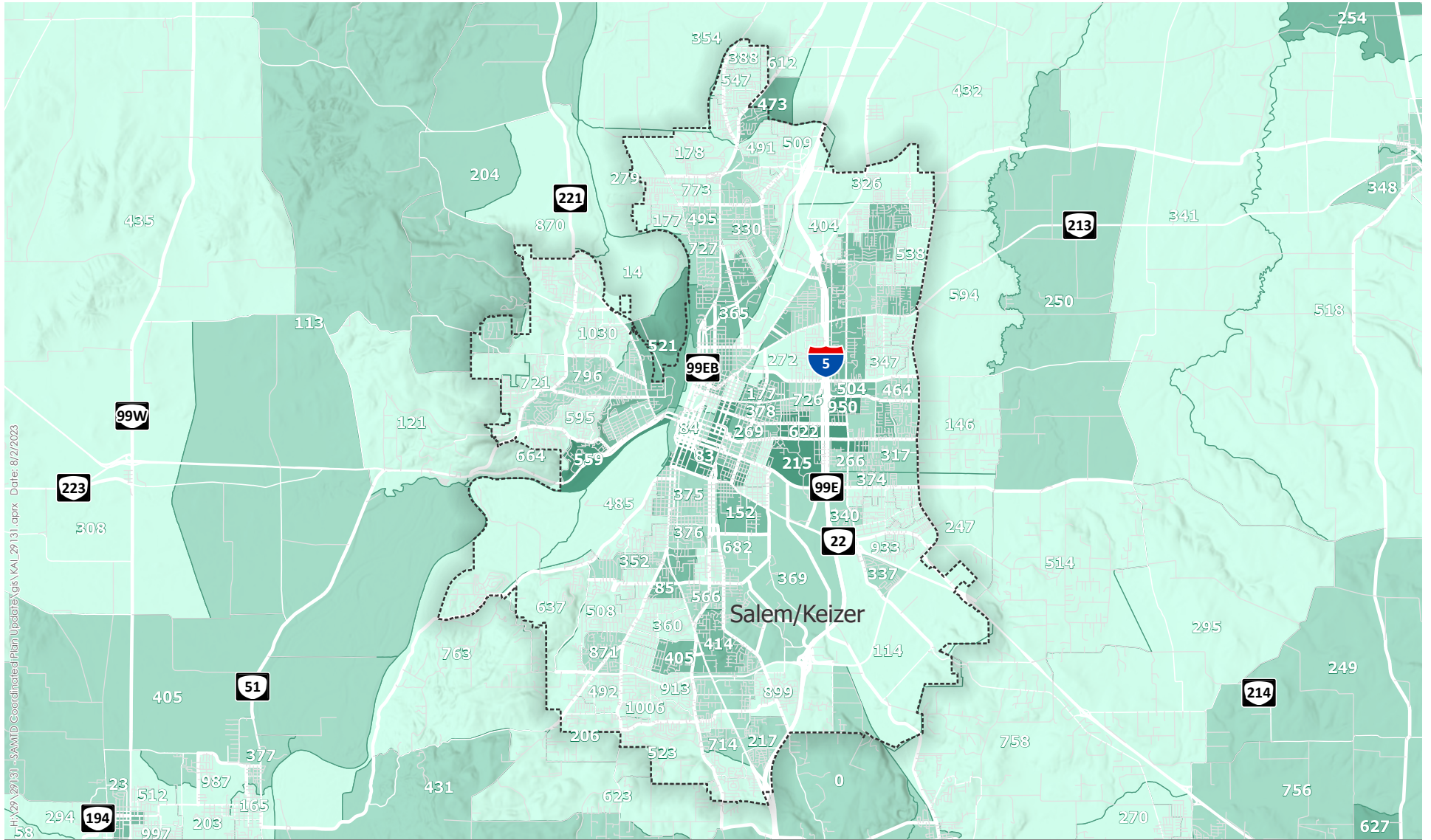
- 0% - 3%
- 4% - 10%
- 11% - 20%
- 21% - 38%

- County Boundary
- UGB



Figure 9

**Zero Vehicle Households  
Monmouth, OR**



**Percentage of Households without a Vehicle**

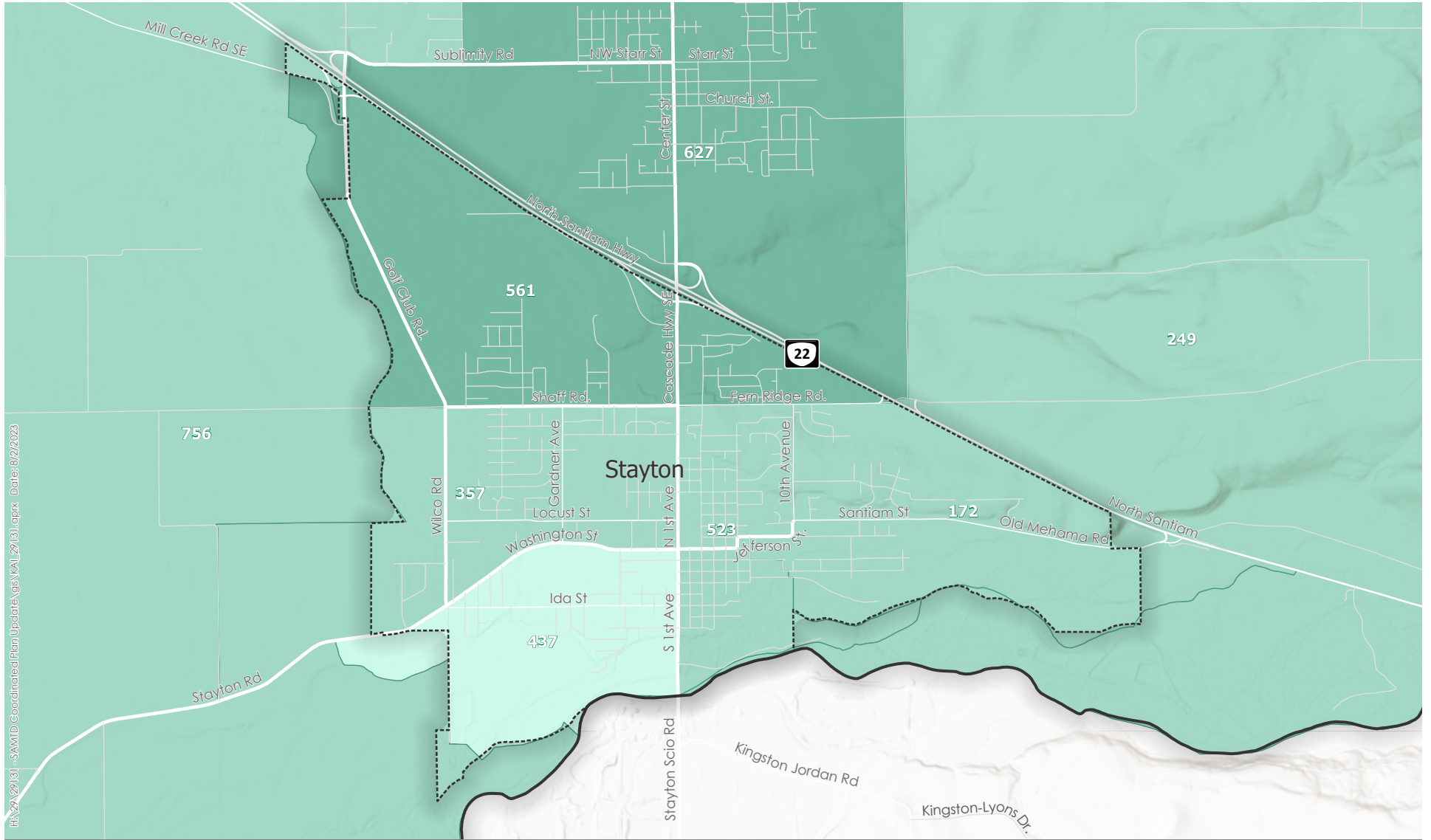
- 0% - 3%
- 4% - 10%
- 11% - 20%
- 21% - 38%

- County Boundary
- UGB



Figure 9

**Zero Vehicle Households  
Salem/Keizer, OR**



H:\22\27131 - SAMTD Coordinated Plan Update\GIS\KAL\_27131.aprx Date: 8/2/2023

**Percentage of Households without a Vehicle**

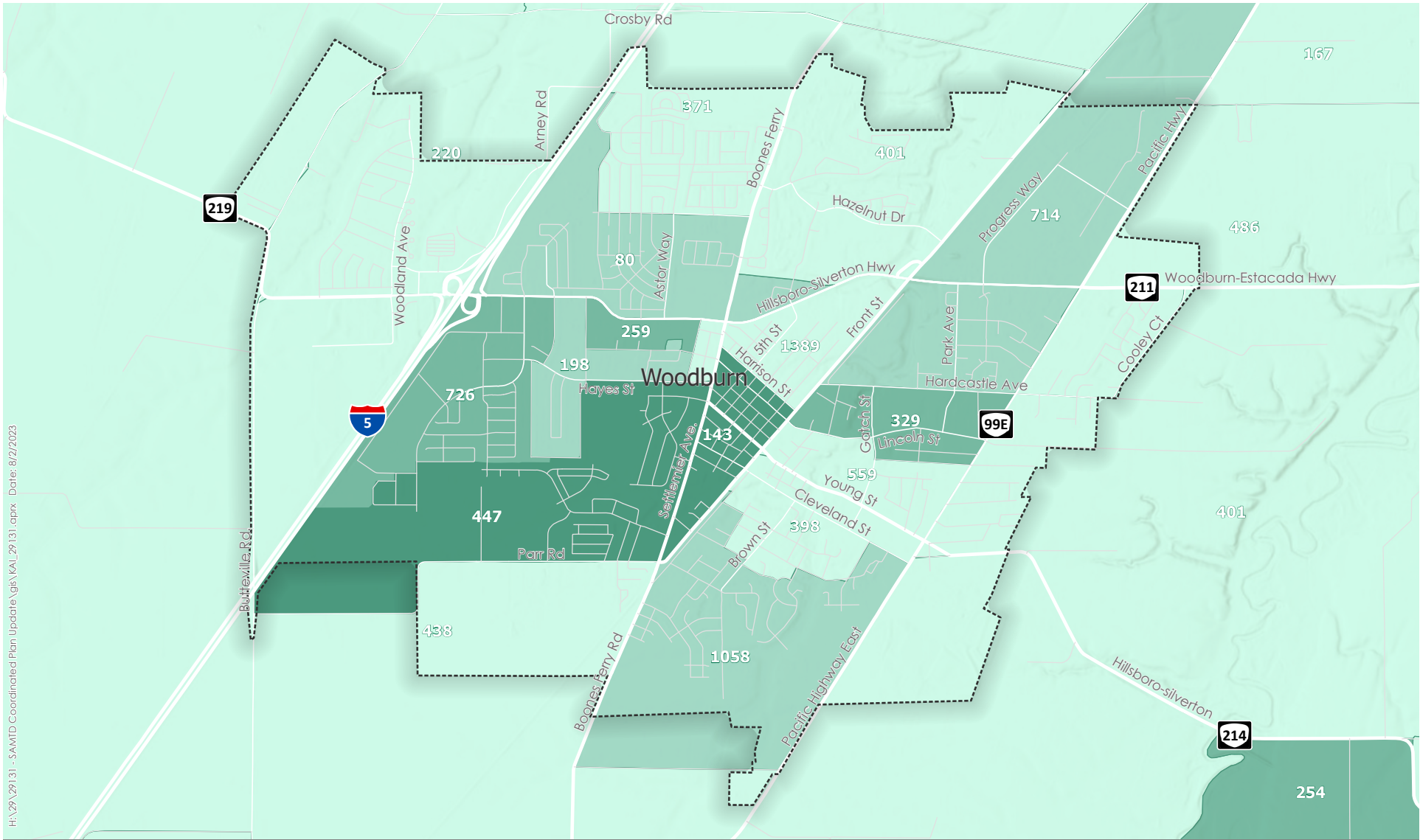
- 0% - 3%
- 4% - 10%
- 11% - 20%
- 21% - 38%

- County Boundary
- UGB



Figure 9

**Zero Vehicle Households  
Stayton, OR**



H:\29\29131 - SAMTD Coordinated Plan Update\GIS\KAL\_29131.aprx Date: 8/2/2023

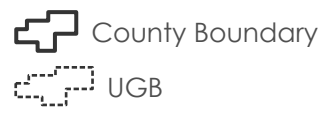
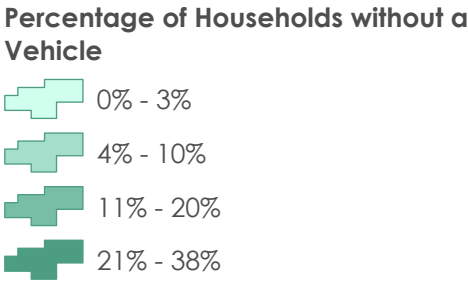
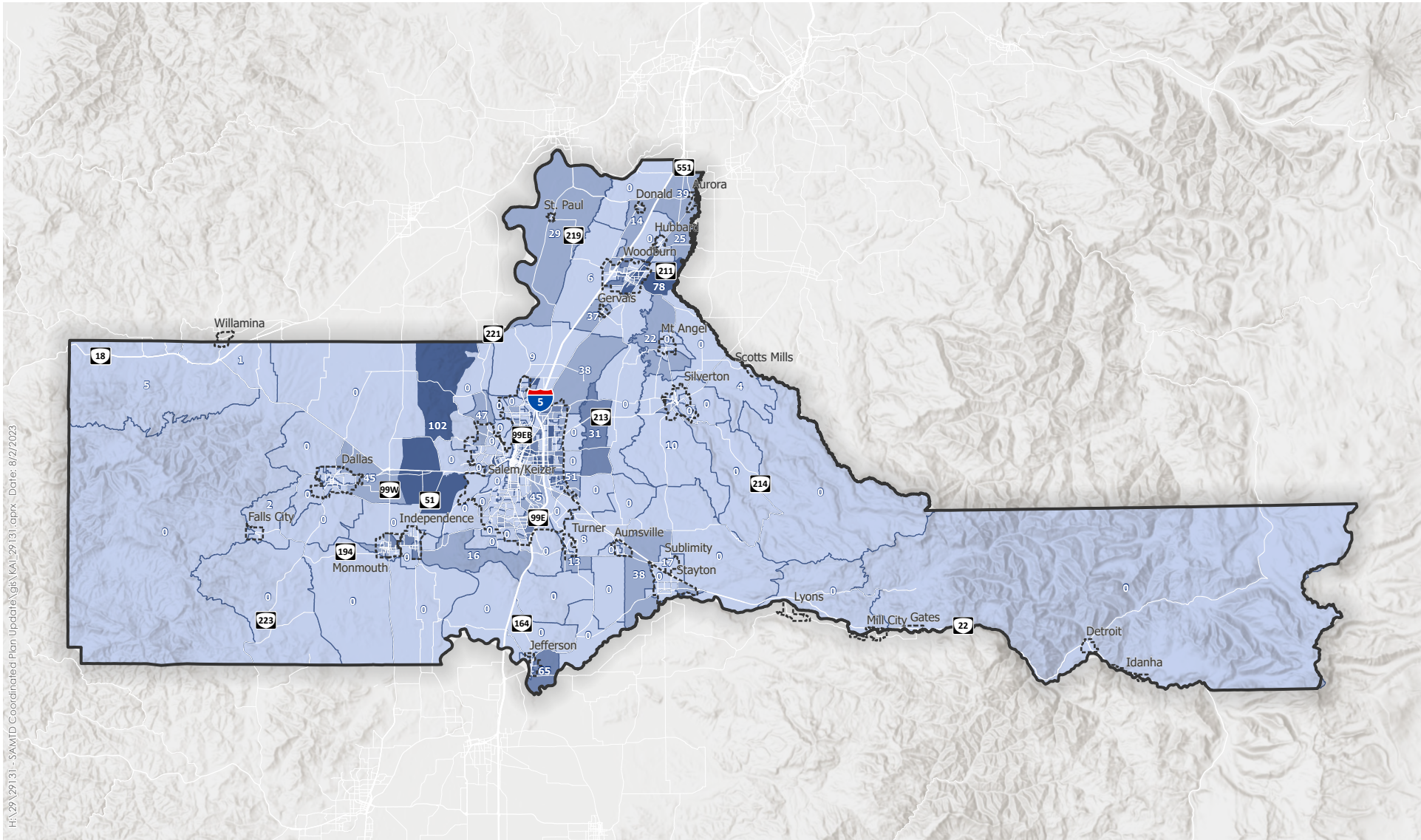


Figure 9

**Zero Vehicle Households  
Woodburn, OR**



**Percentage of Households with Limited English Proficiency (LEP) by Block Group**

- 0% - 2%
- 3% - 7%
- 8% - 19%
- 20% - 54%

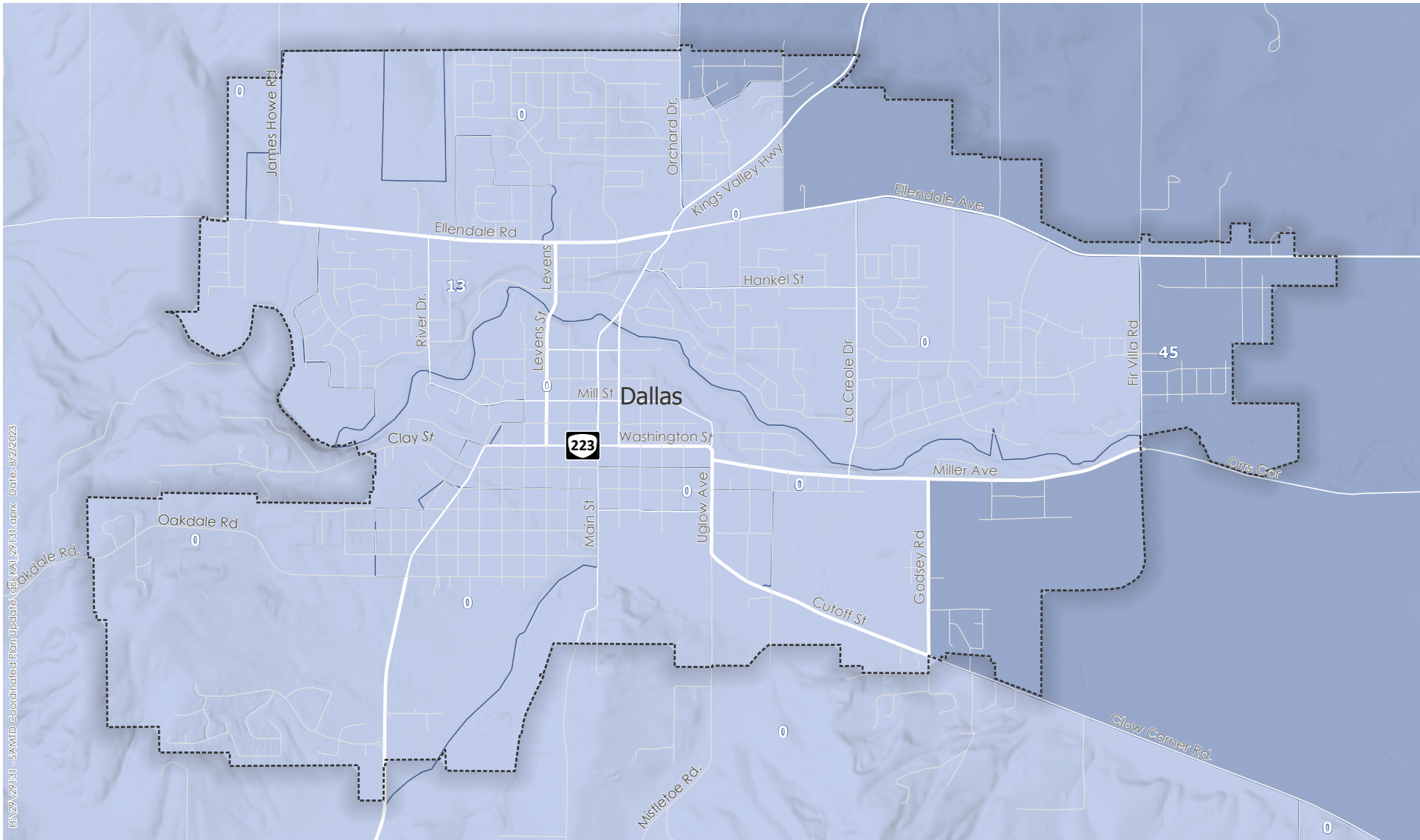
- County Boundary
- UGB



Figure 10

**Households with Limited English Proficiency (LEP)  
Marion and Polk Counties, OR**





**Percentage of Households with Limited English Proficiency (LEP) by Block Group**

- 0% - 2%
- 3% - 7%
- 8% - 19%
- 20% - 54%

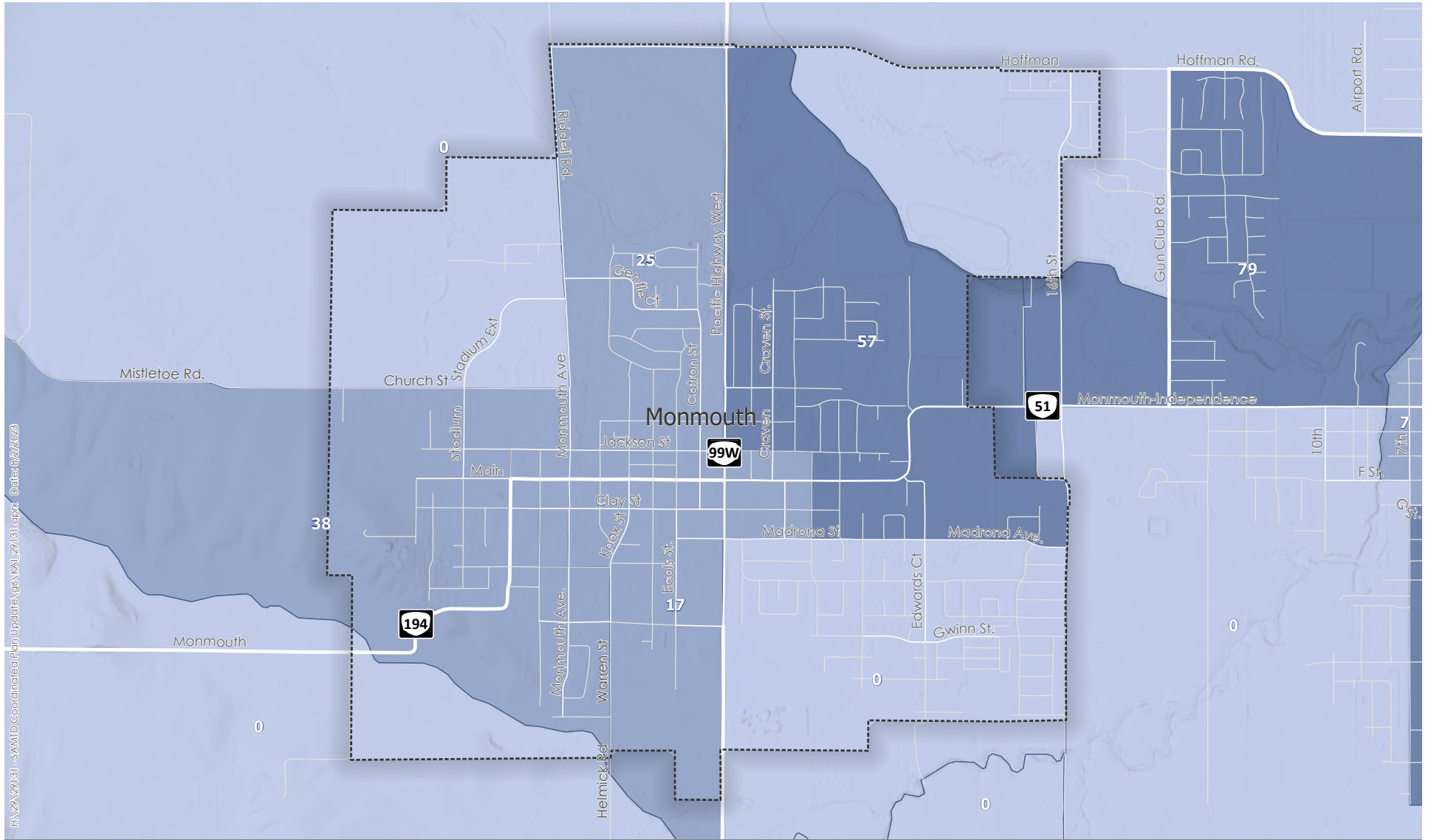
- County Boundary
- UGB

0 0.9 Miles



Figure 10

**Households with Limited English Proficiency (LEP)  
Dallas, OR**



**Percentage of Households with Limited English Proficiency (LEP) by Block Group**

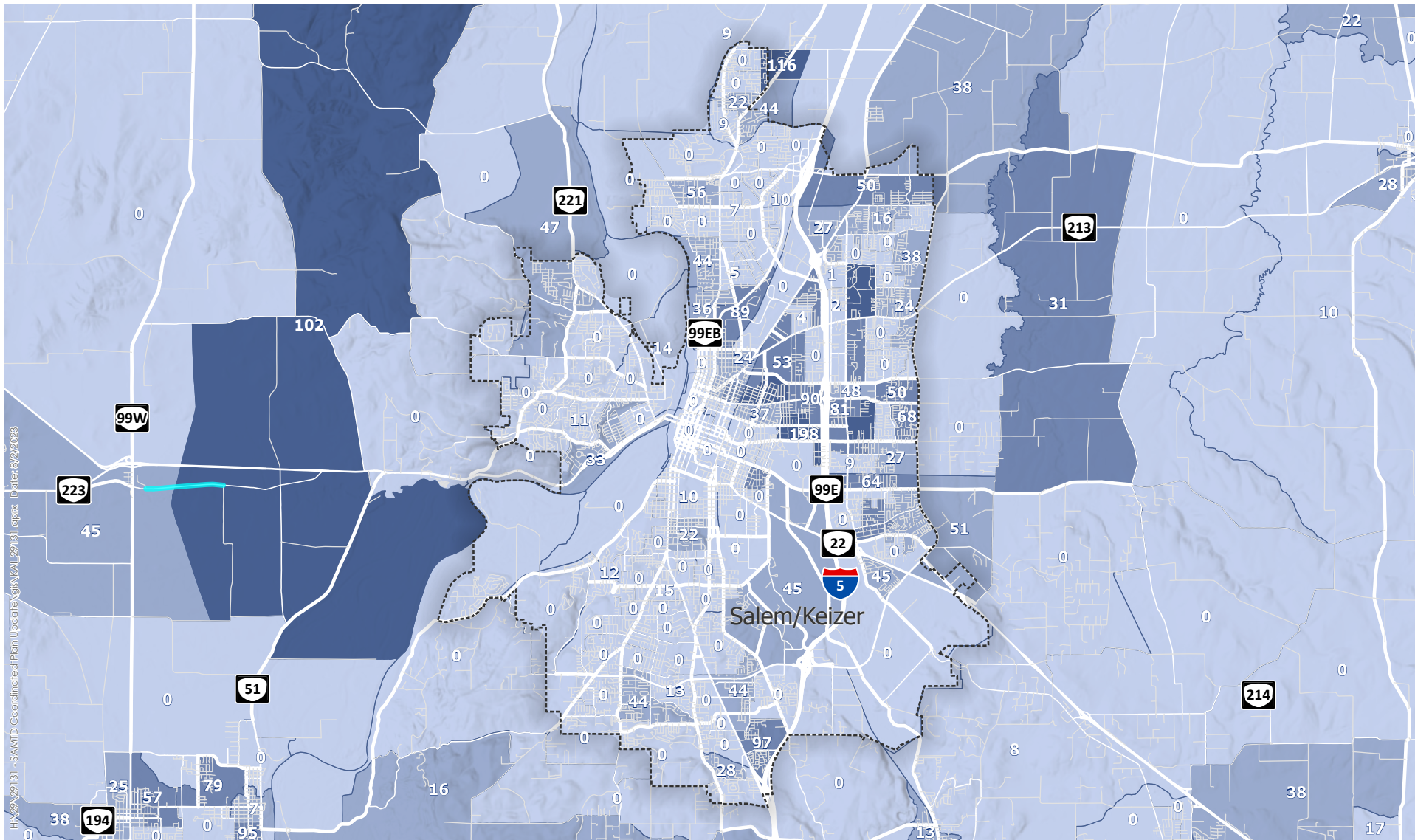
- 0% - 2%
- 3% - 7%
- 8% - 19%
- 20% - 54%

- County Boundary
- UGB



Figure 10

**Households with Limited English Proficiency (LEP)  
Monmouth, OR**



**Percentage of Households with Limited English Proficiency (LEP) by Block Group**

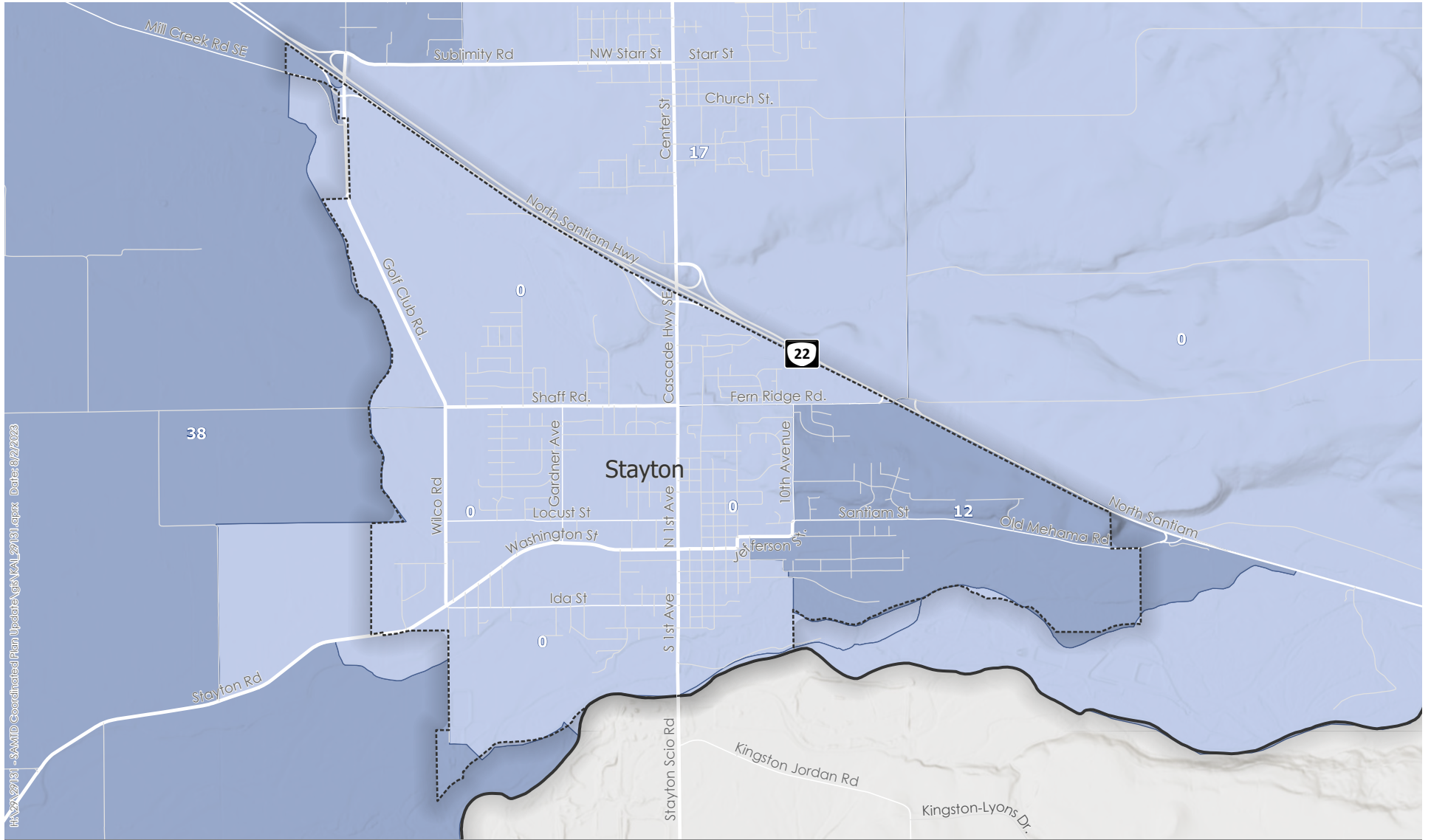
- 0% - 2%
- 3% - 7%
- 8% - 19%
- 20% - 54%

- County Boundary
- UGB



Figure 10

**Households with Limited English Proficiency (LEP)  
Salem/Keizer, OR**



**Percentage of Households with Limited English Proficiency (LEP) by Block Group**

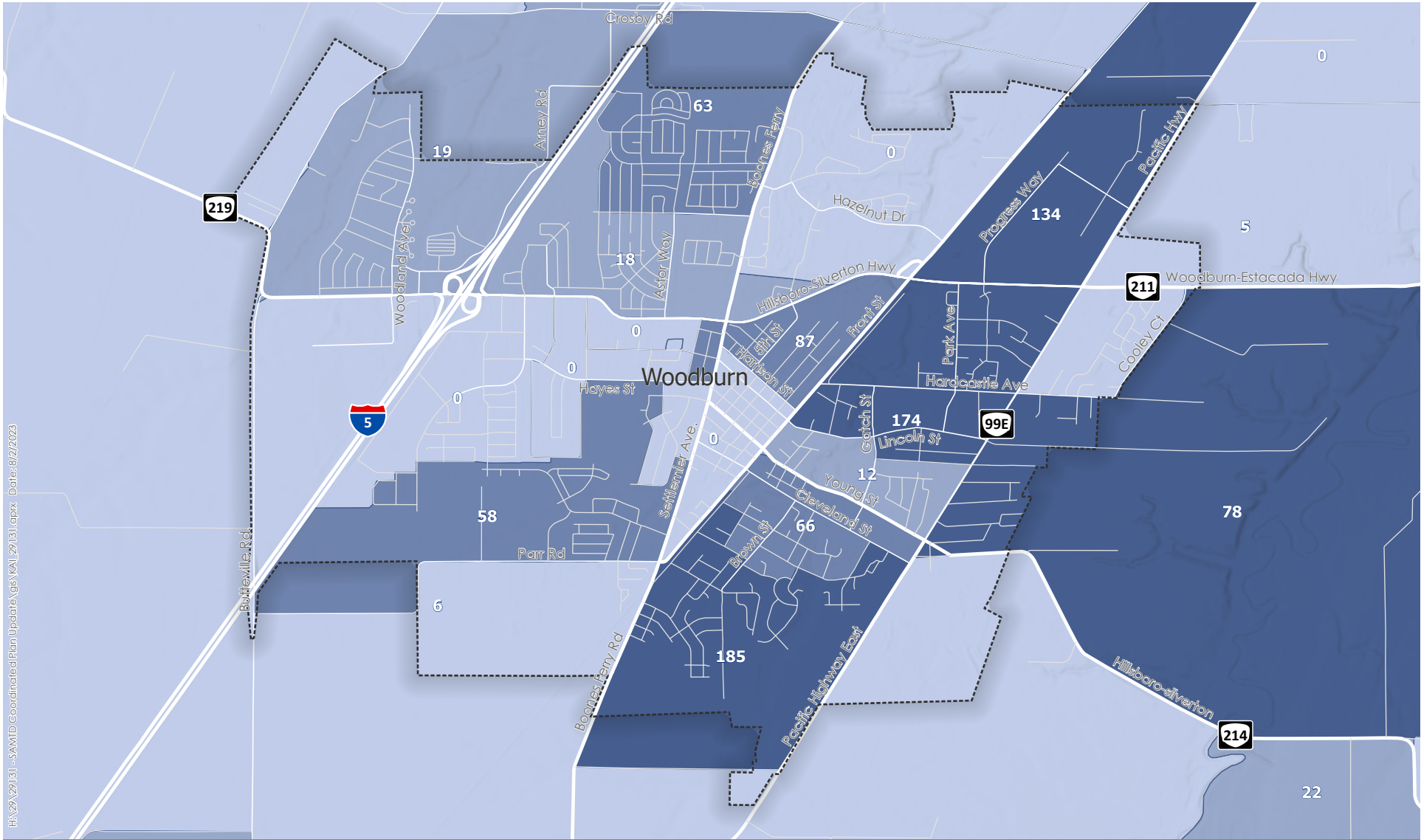
- 0% - 2%
- 3% - 7%
- 8% - 19%
- 20% - 54%

- County Boundary
- UGB



Figure 10

**Households with Limited English Proficiency (LEP)  
Stayton, OR**



HY23\29131 - SAMTD Coordinated Plan Update\GIS\KAL\_29131.aprx Date: 8/2/2023

**Percentage of Households with Limited English Proficiency (LEP) by Block Group**

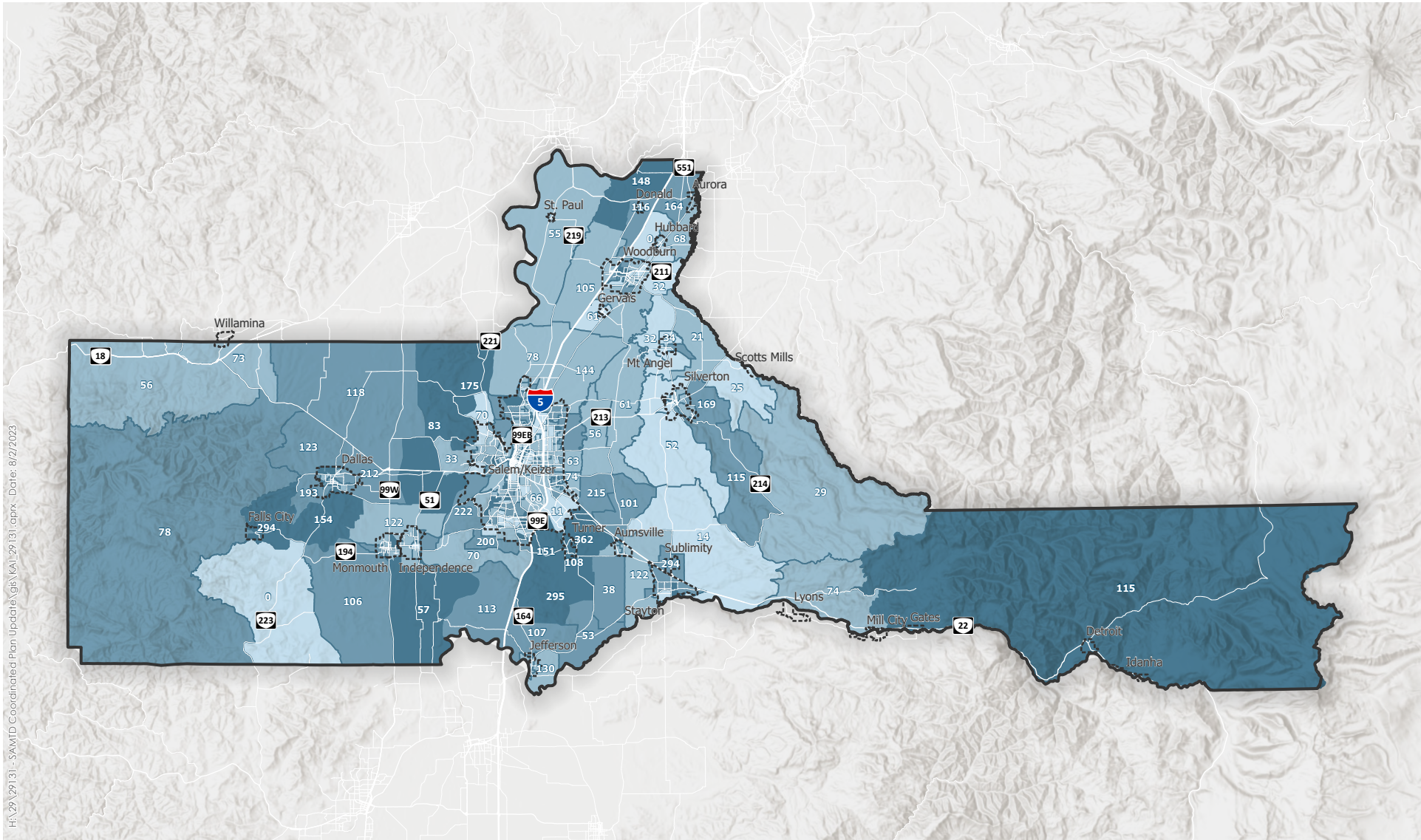
- 0% - 2%
- 3% - 7%
- 8% - 19%
- 20% - 54%

County Boundary  
 UGB

0 1 Miles





Figure 10

**Households with Limited English Proficiency (LEP)  
Woodburn, OR**



H:\29\29131 - SAMTD Coordinated Plan Update\GIS\KAL\29131.aprx Date: 8/12/2023

**Percentage of Population with Veteran Status by Block Group**

-  0% - 3%
-  4% - 6%
-  7% - 10%
-  11% - 16%



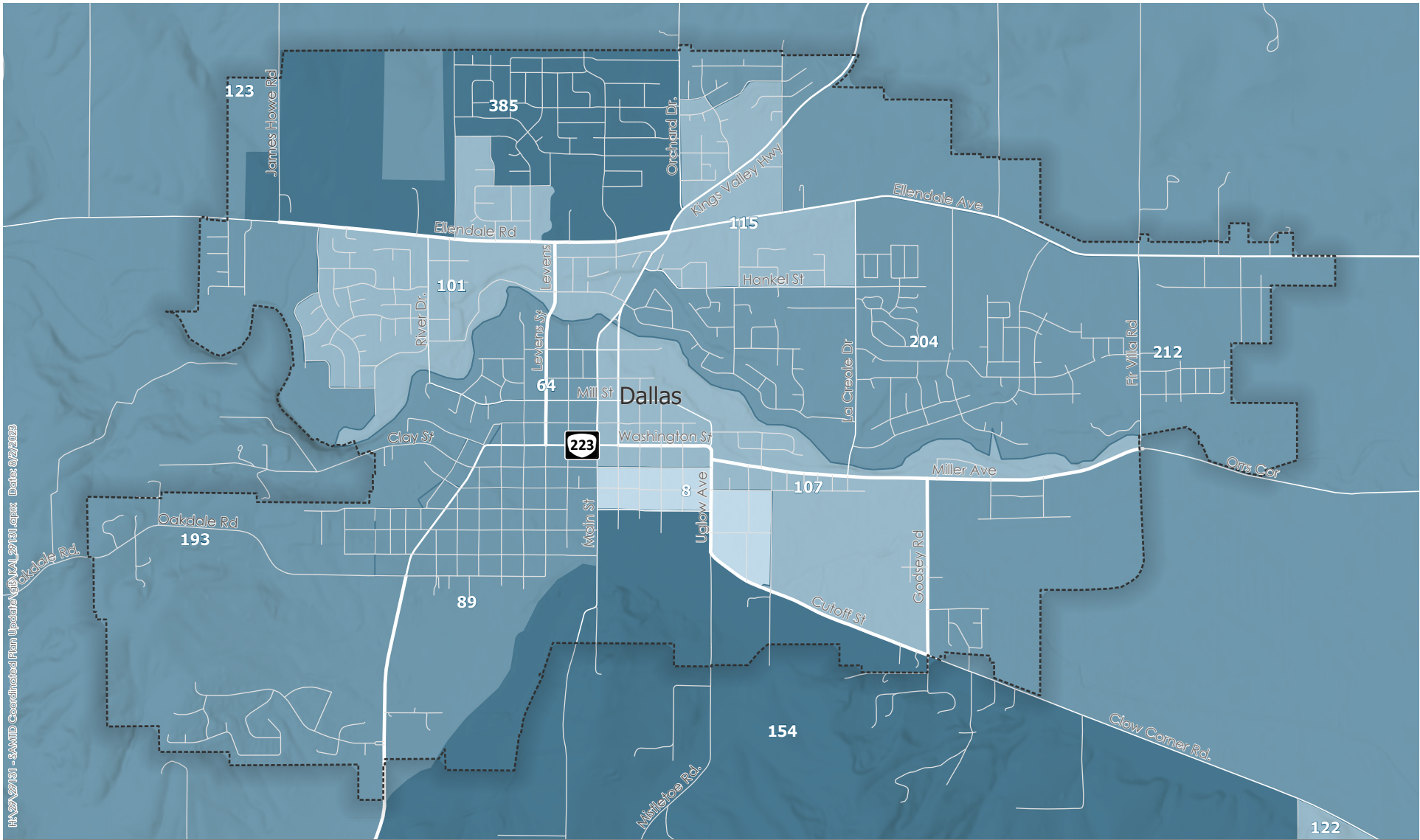
-  County Boundary
-  UGB



Figure 11

**Veteran Population  
Marion and Polk Counties, OR**



**Percentage of Population with Veteran Status by Block Group**

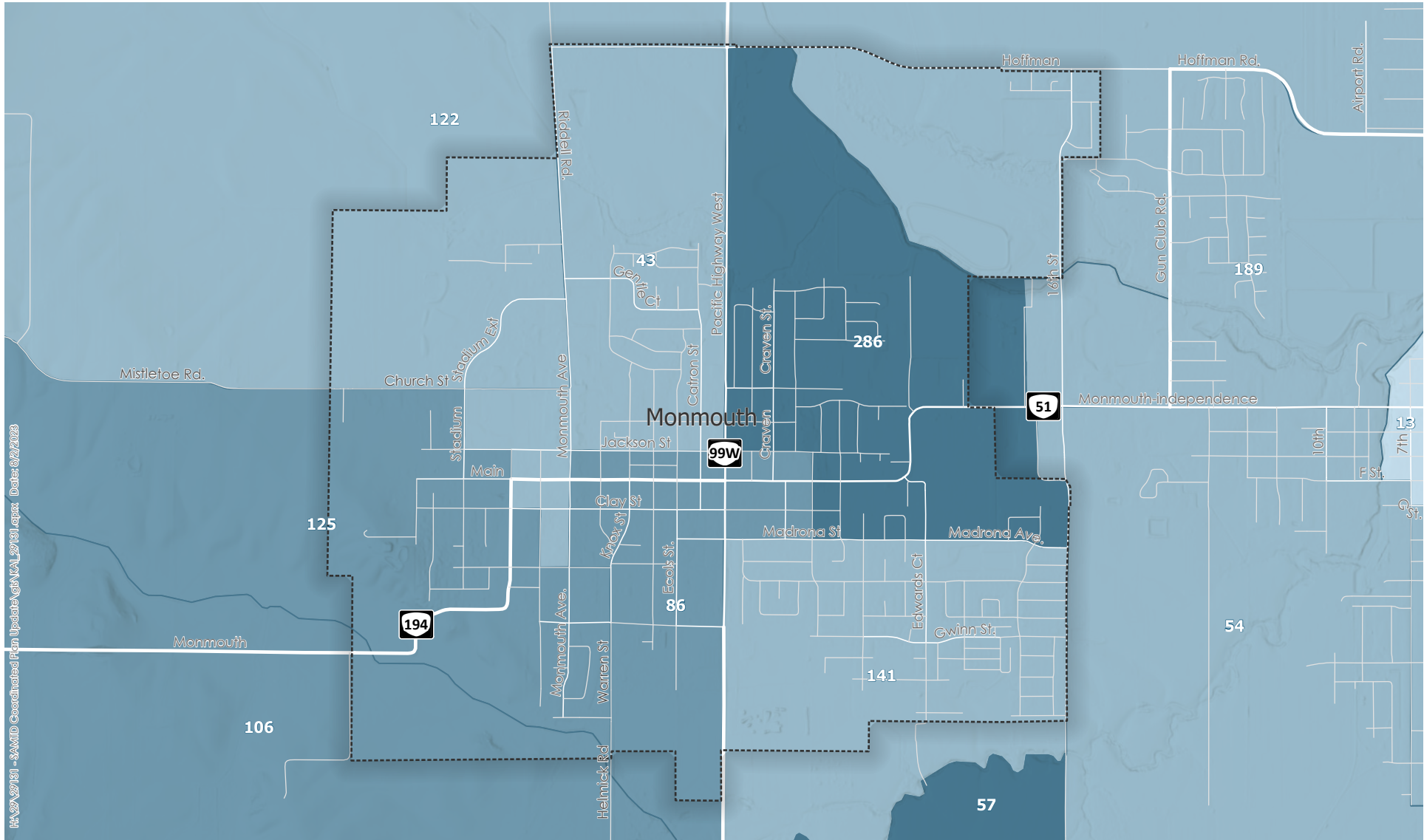
- 0% - 3%
- 4% - 6%
- 7% - 10%
- 11% - 16%

- County Boundary
- UGB







Figure 11

**Veteran Population  
Dallas, OR**



H:\2024\27131 - SAMID Coordinated Plan Update\GIS\Map\_27131.aprx Date: 8/2/2023

**Percentage of Population with Veteran Status by Block Group**

-  0% - 3%
-  4% - 6%
-  7% - 10%
-  11% - 16%



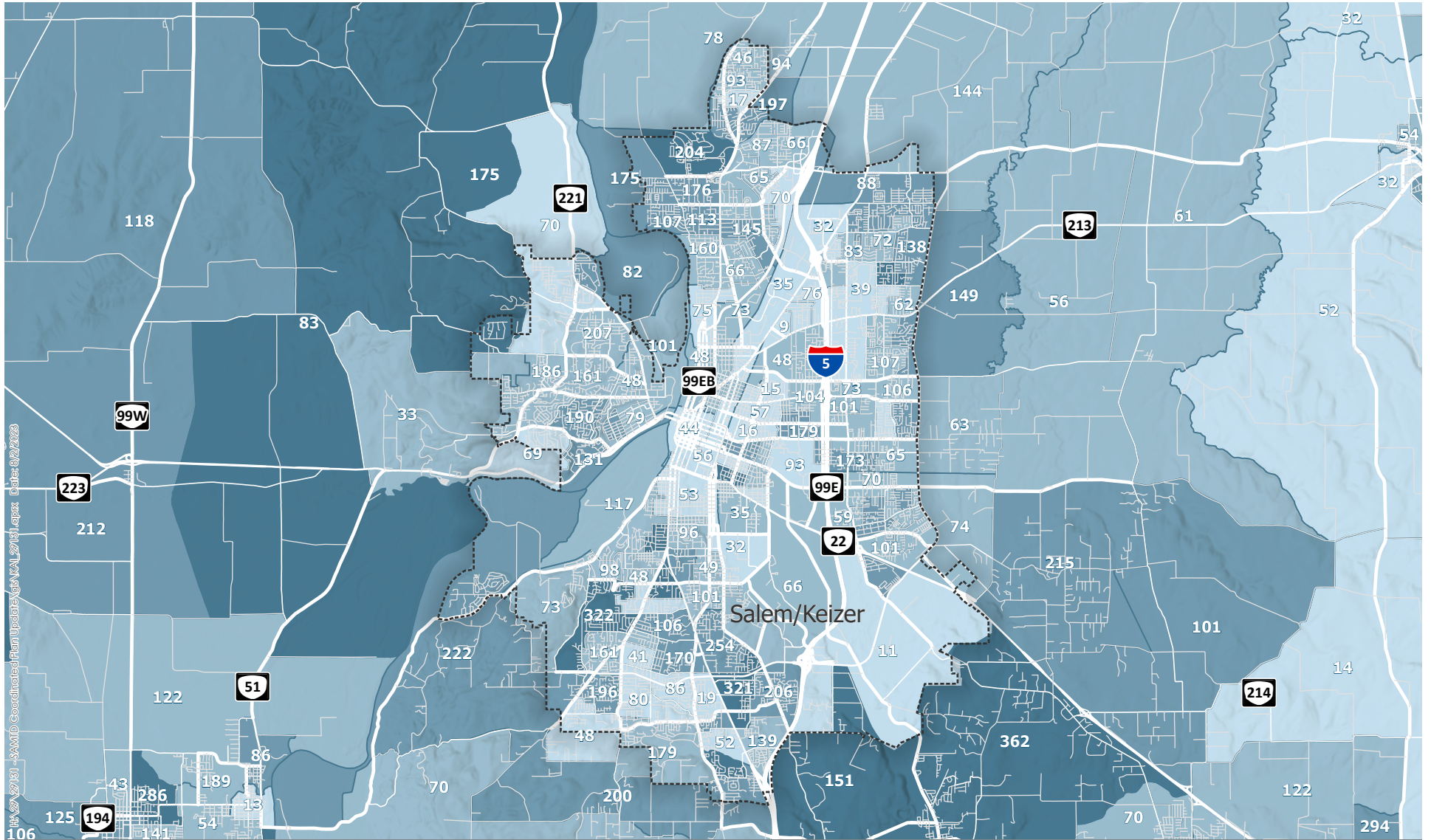
-  County Boundary
-  UGB



Figure 11

**Veteran Population  
Monmouth, OR**





**Percentage of Population with Veteran Status by Block Group**

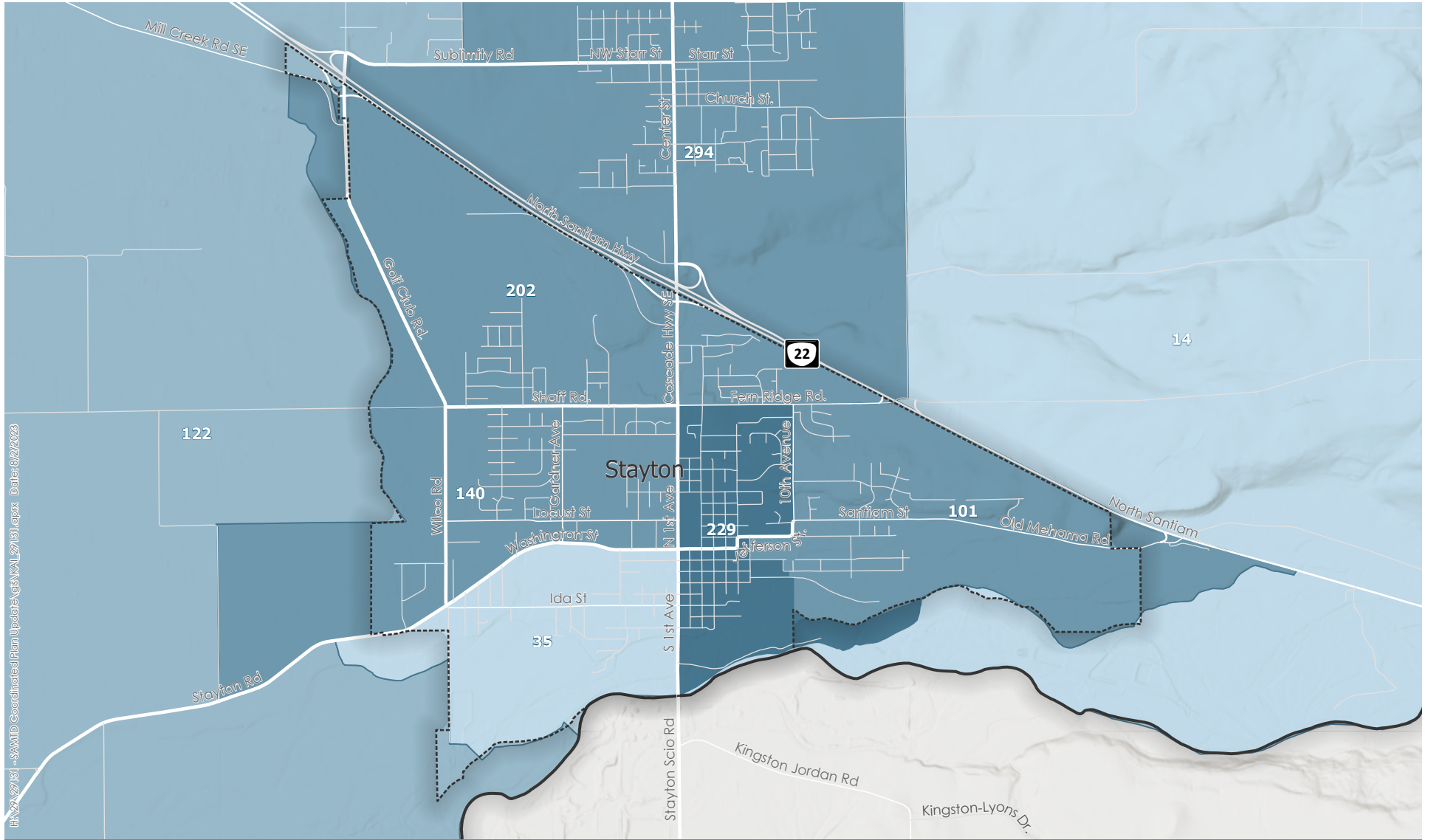
- 0% - 3%
- 4% - 6%
- 7% - 10%
- 11% - 16%

- County Boundary
- UGB



Figure 11

**Veteran Population Salem/Keizer, OR**



**Percentage of Population with Veteran Status by Block Group**

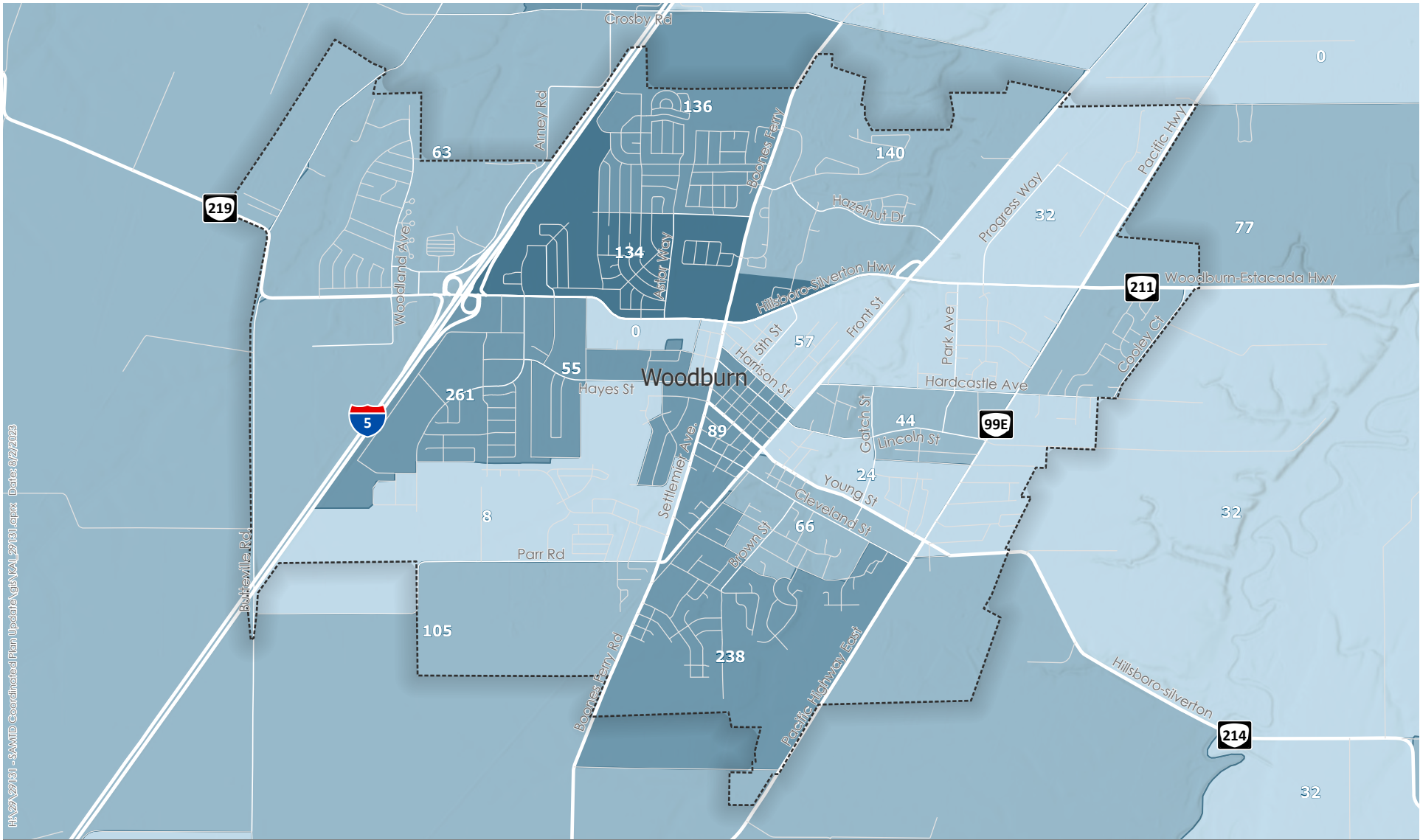
- 0% - 3%
- 4% - 6%
- 7% - 10%
- 11% - 16%

- County Boundary
- UGB



Figure 11

**Veteran Population  
Stayton, OR**



H:\27181 - SAMID Coordinated Plan Update\GIS\27181.aprx Date: 8/2/2023

**Percentage of Population with Veteran Status by Block Group**

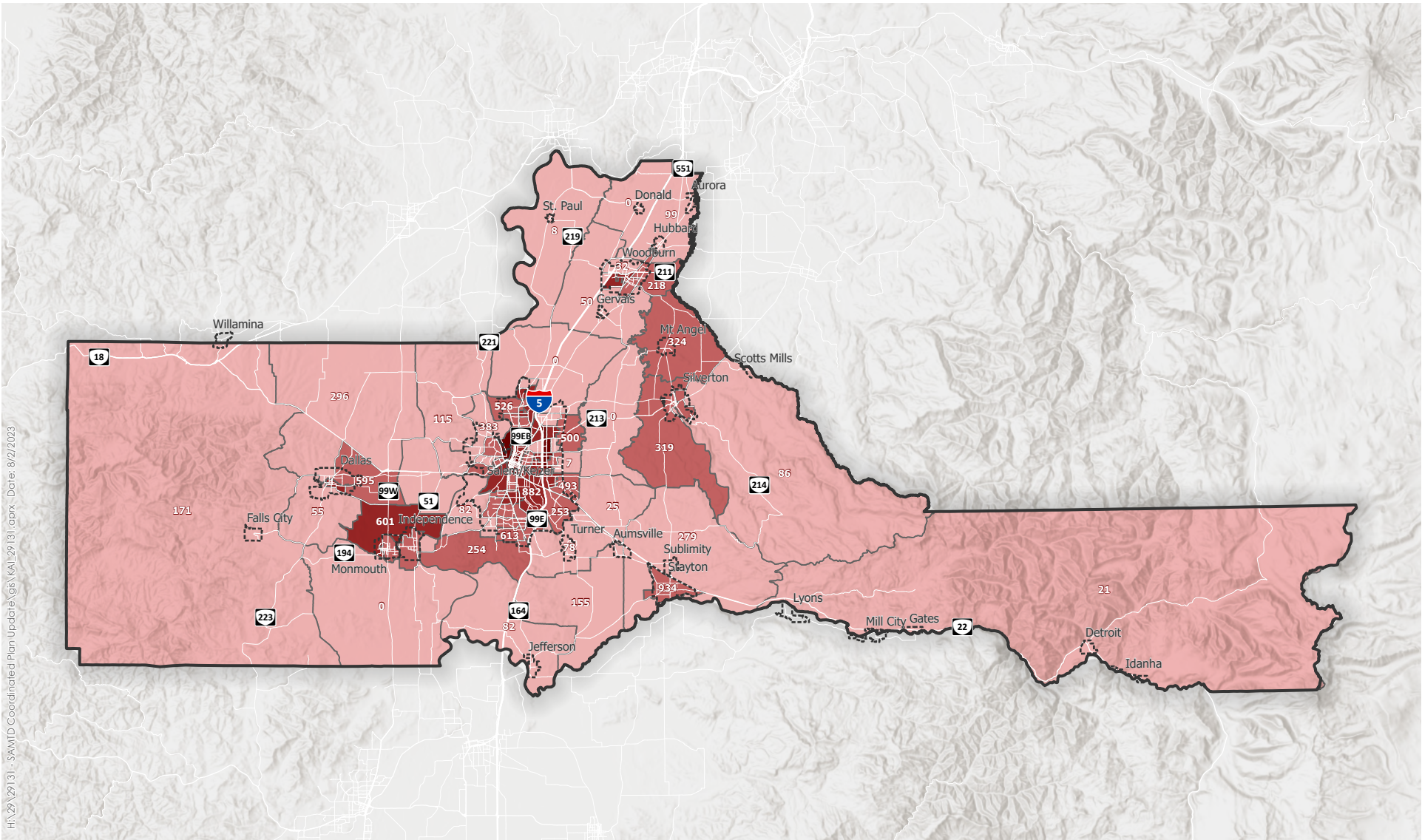
- 0% - 3%
- 4% - 6%
- 7% - 10%
- 11% - 16%

- County Boundary
- UGB



Figure 11

**Veteran Population  
Woodburn, OR**



H:\29\29131 - SAWITD Coordinated Plan Update\GIS\KAL\29131.aprx, Date: 8/12/2023

**Percentage of Households with 2 or More Units by Tract**

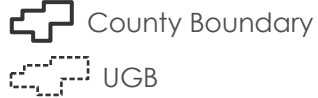
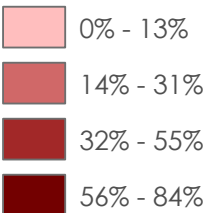
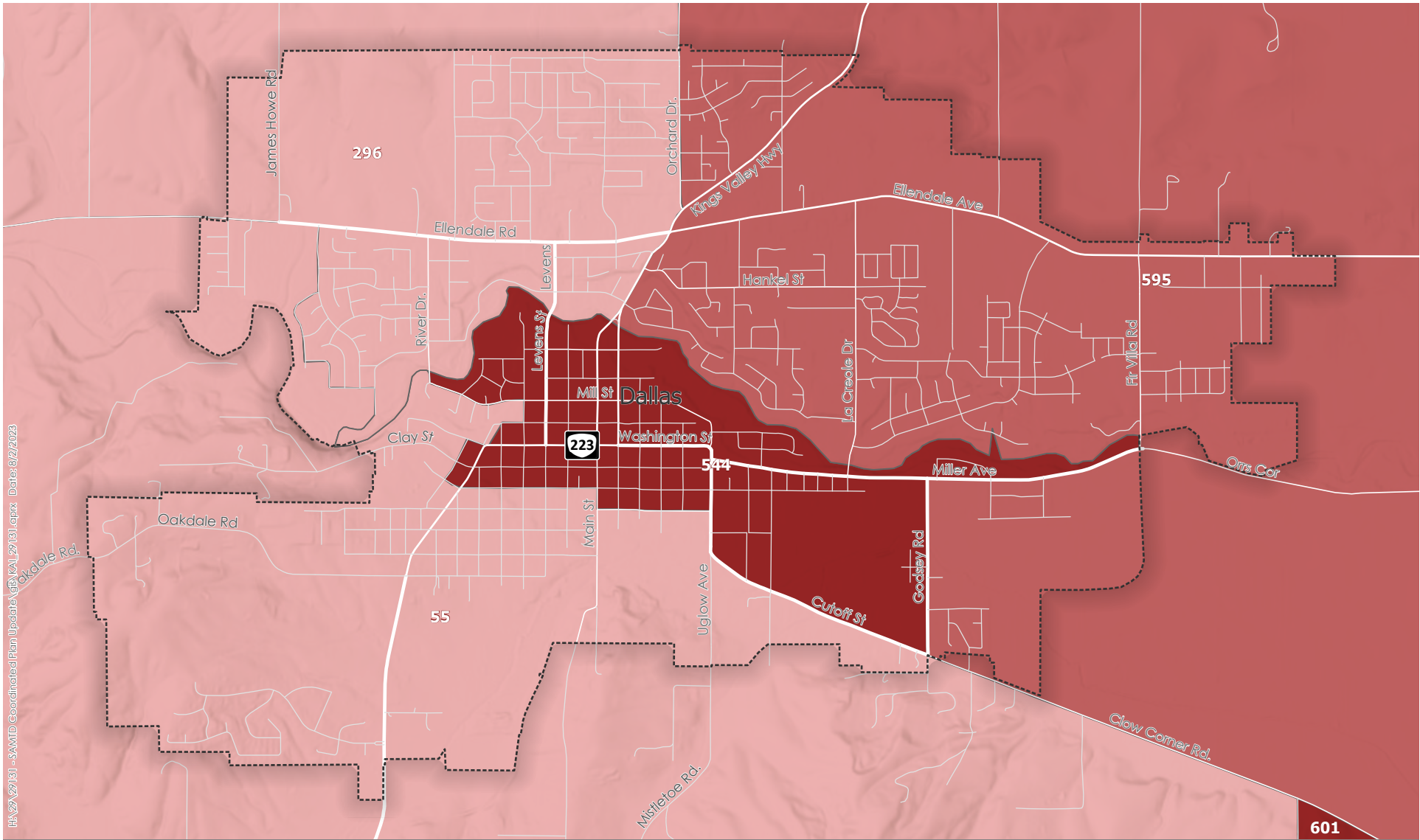


Figure 12

**Multi-Unit Households (2+ Units)  
Marion and Polk Counties, OR**



**Percentage of Households with 2 or More Units by Tract**

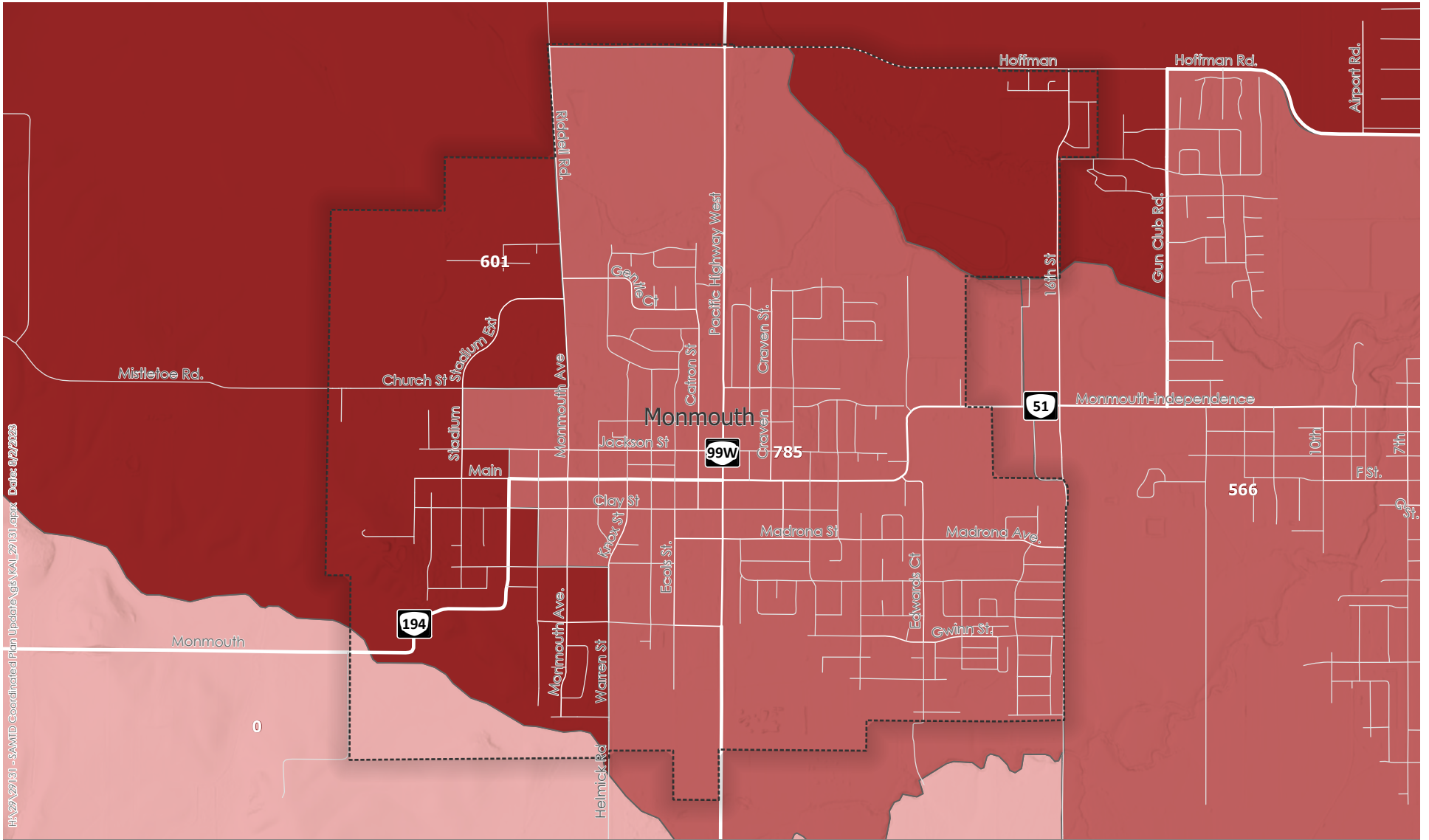
- 0% - 13%
- 14% - 31%
- 32% - 55%
- 56% - 84%

- County Boundary
- UGB



Figure 12

**Multi-Unit Households (2+ Units)  
Dallas, OR**



H:\29\29181 - SAMID Coordinated Plan Update\GIS\KAL\_29181.aprx Date: 8/2/2023

**Percentage of Households with 2 or More Units by Tract**

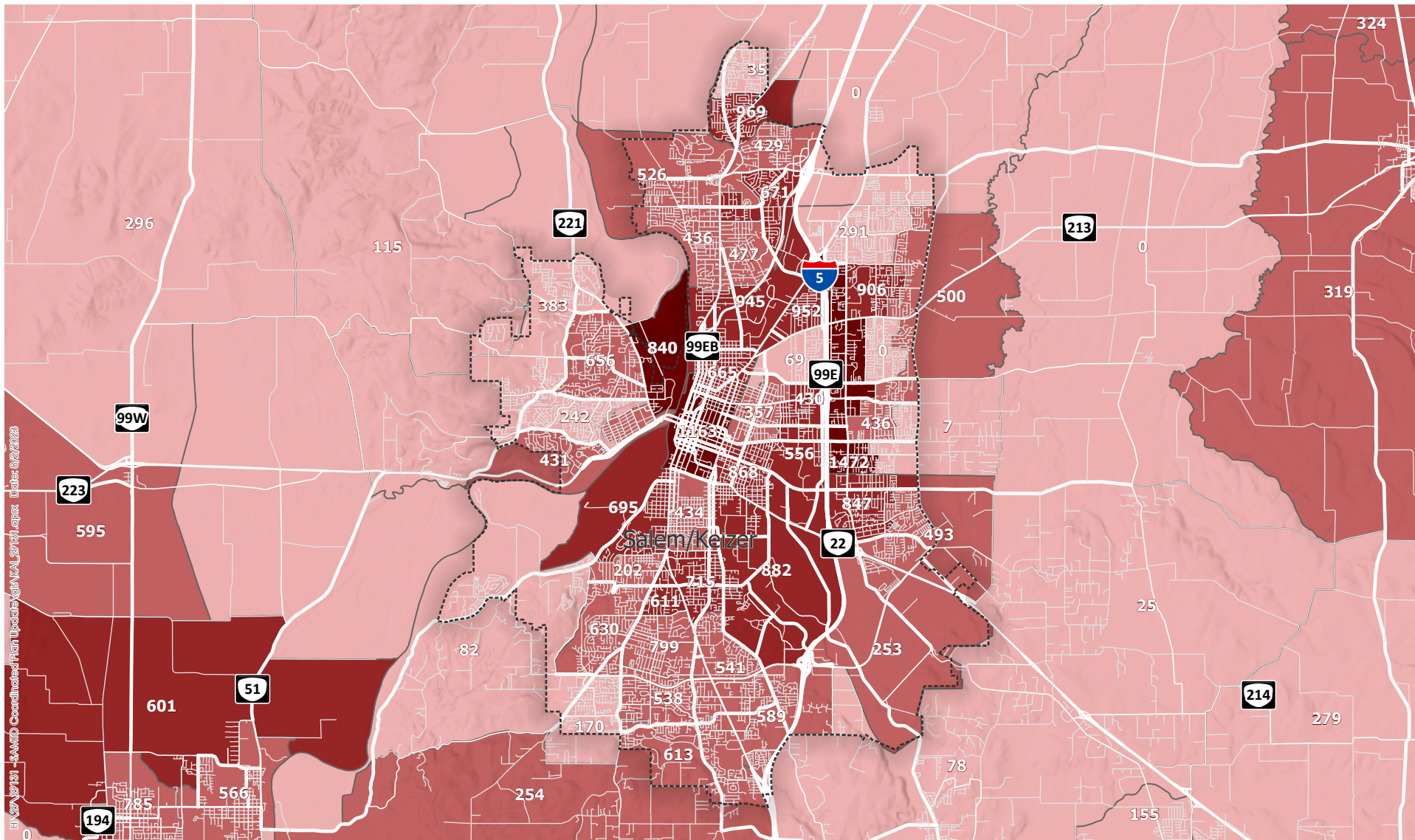
- 0% - 13%
- 14% - 31%
- 32% - 55%
- 56% - 84%

- County Boundary
- UGB



Figure 12

**Multi-Unit Households (2+ Units)  
Monmouth, OR**



**Percentage of Households with 2 or More Units by Tract**

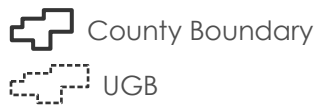
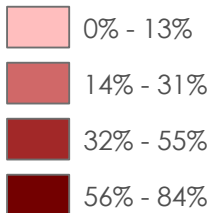
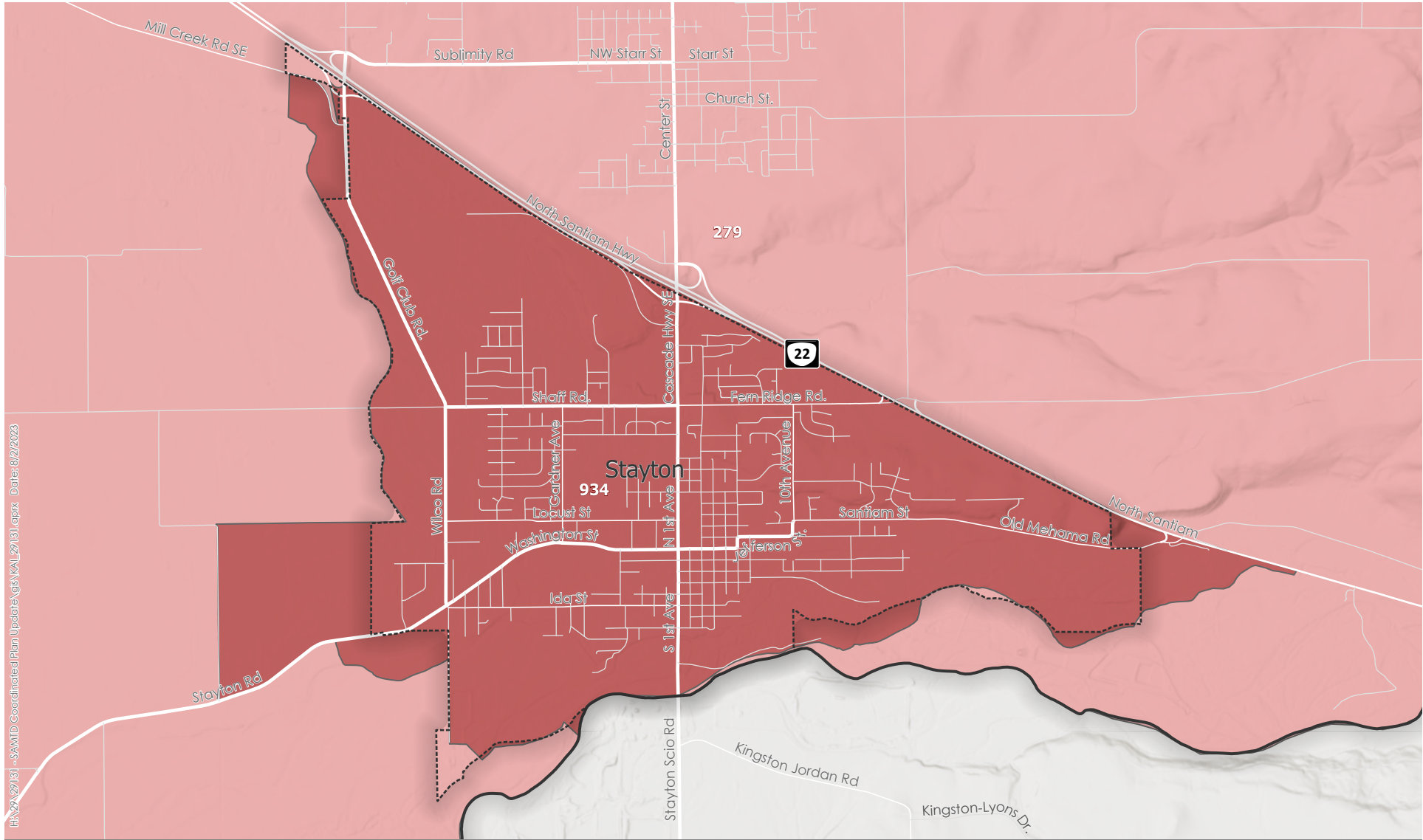


Figure 12

**Multi-Unit Households (2+ Units)  
Salem/Keizer, OR**



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**Percentage of Households with 2 or More Units by Tract**

- 0% - 13%
- 14% - 31%
- 32% - 55%
- 56% - 84%

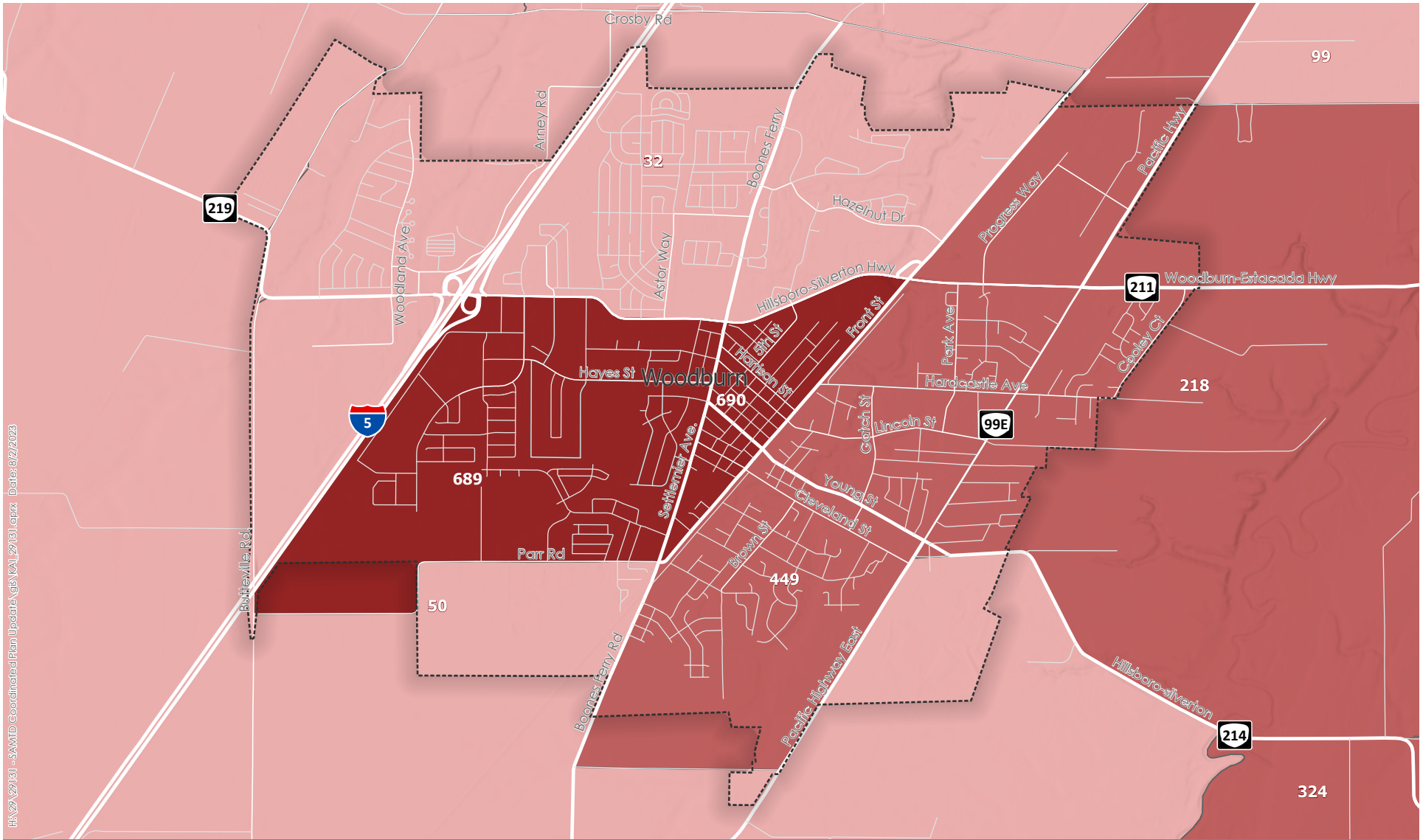
- County Boundary
- UGB



Figure 12

**Multi-Unit Households (2+ Units)  
Stayton, OR**





**Percentage of Households with 2 or More Units by Tract**

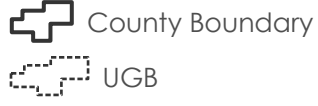
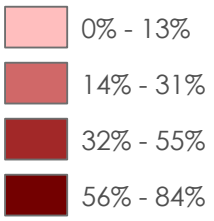
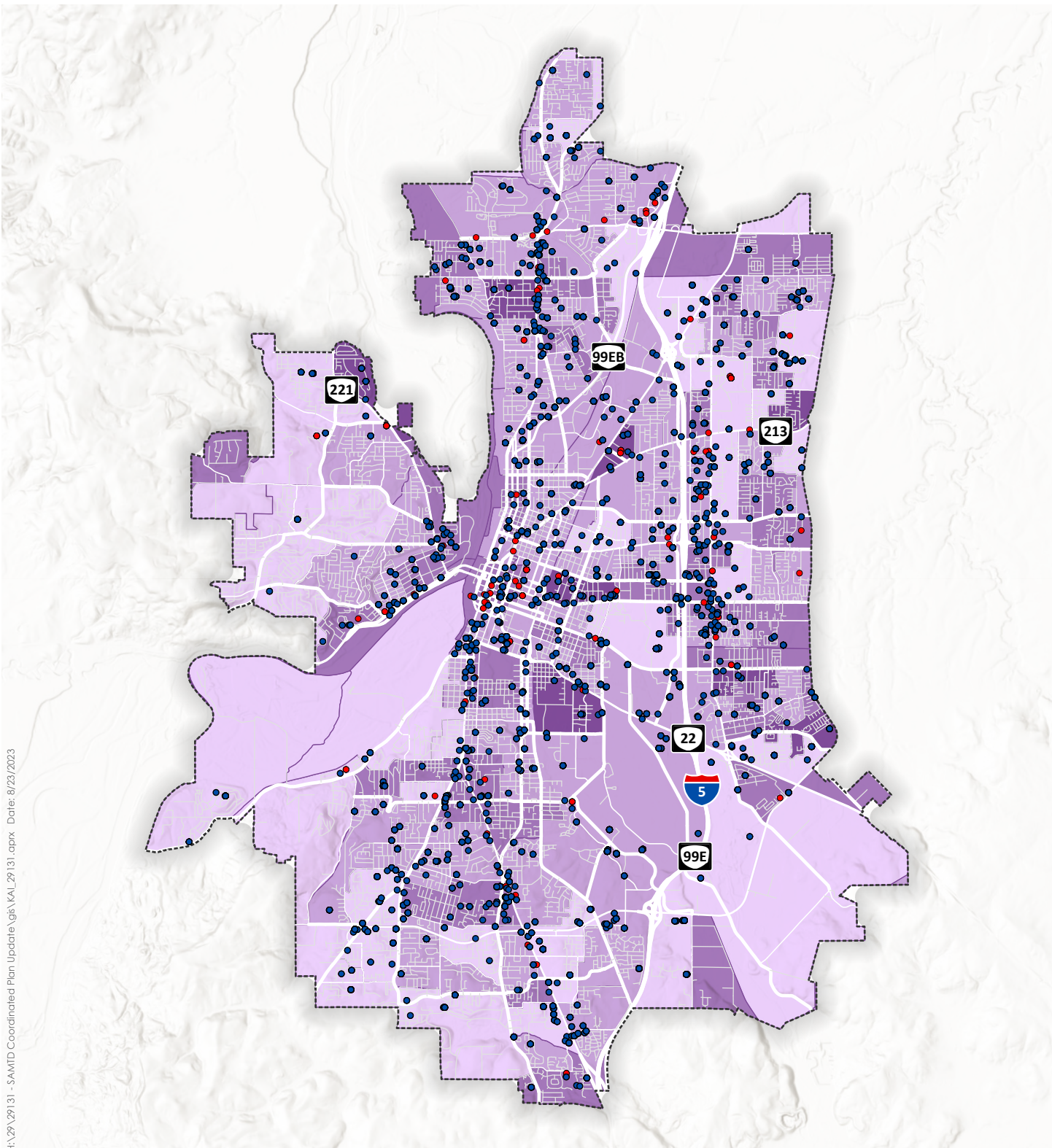






Figure 12

**Multi-Unit Households (2+ Units)  
Woodburn, OR**

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**Percentage of Population with a Disability by Block Group**

-  1% - 10%
-  11% - 16%
-  17% - 24%
-  25% - 40%




-  Origins
-  Destinations
-  Salem/ Keizer UGB

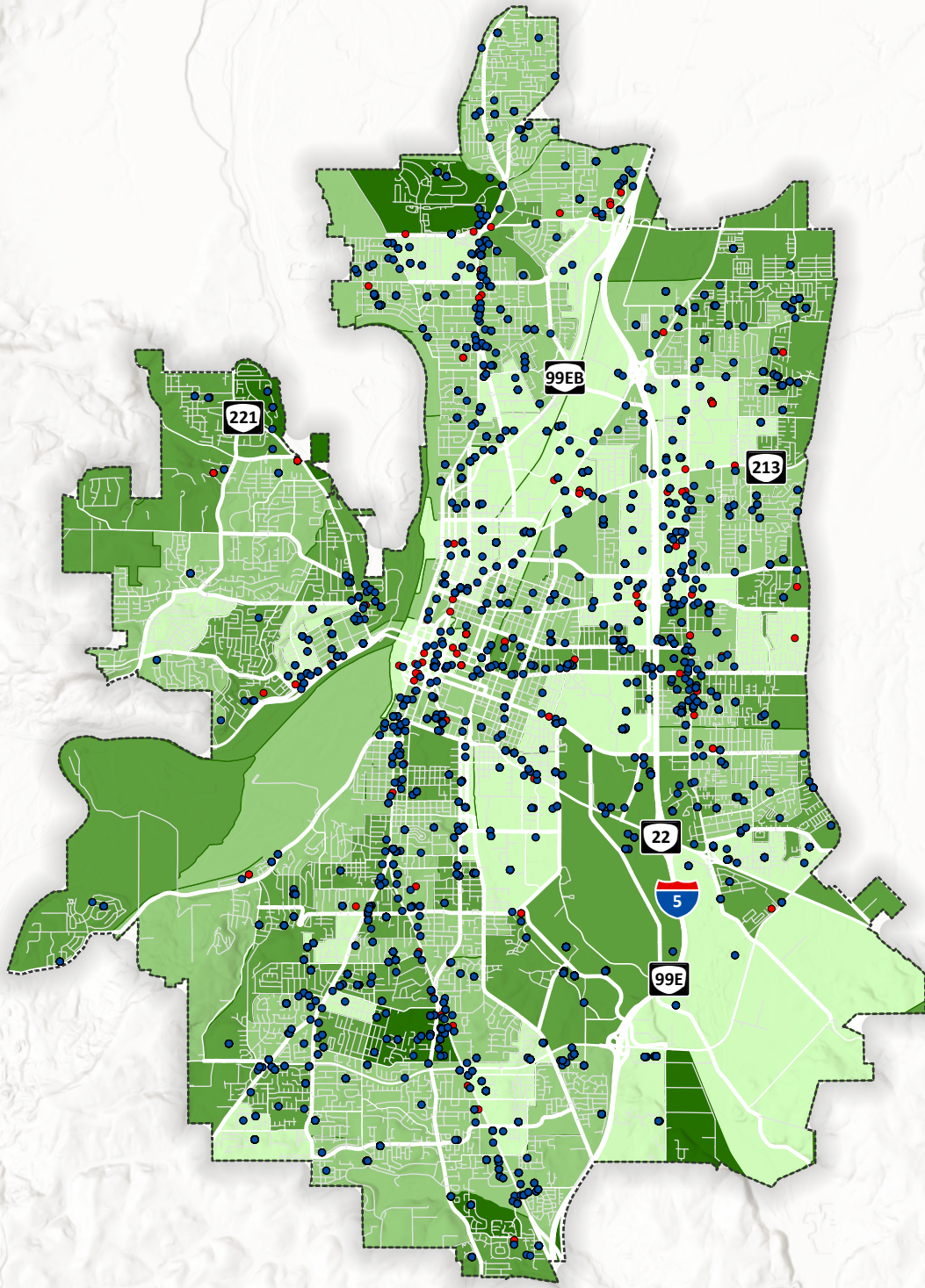


Figure 13

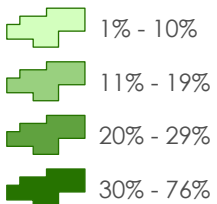
**Origins and Destinations for Cherriots LIFT Customers and Population with Disabilities Salem/ Keizer, OR**



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**Percentage of Population Age 65 and Over by Block Group**



- Origins
- Destinations
- Salem/ Keizer UGB



Figure 14

**Origins and Destinations for Cherriots LIFT Customers and Senior Population (Age 65 and Older) Salem/ Keizer, OR**

## APPENDIX D: MEMO #3 – TRANSIT PROVIDERS

# Technical Memorandum

September 19, 2023

Project# 29131

To: Ted Stonecliffe, PMP, and Chris French  
 Salem Area Mass Transit District  
 555 County St NE, Suite 5230  
 Salem, OR 97301

From: Susan Wright, PE, PMP, Krista Purser, PE, and Katie Popp, Kittelson and Associates

RE: 2024 Cherriots Coordinated Plan Update for Marion and Polk Counties

## TRANSIT AND HUMAN SERVICES PROVIDERS

Transit and Human Services Providers..... 1

    Introduction ..... 1

    STIF & Section 5310 Providers..... 6

        Cherriots..... 6

        City of Woodburn ..... 9

        City of Silverton ..... 11

        Monmouth-Independence Trolley ..... 11

        Salem Health (West Valley Hospital) ..... 11

        Garten ..... 12

        Legacy Silverton Medical Center ..... 12

    Other Transportation Providers..... 12

        Mobility Management ..... 13

        Discontinued Services ..... 13

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## Introduction

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This memorandum covers an overview of transit providers in Marion and Polk Counties that currently receive either Statewide Transportation Improvement Fund (STIF) or Section 5310 grant dollars. This memo focuses on providers that offer public transit or paratransit services for seniors and persons with disabilities, which establish the Cherriots Coordinated Plan Update for Marion and Polk Counties, including:

- Cherriots (SAMTD)
- Woodburn Transit Service (WTS)
- City of Silverton Silver Trolley
- Salem Health (West Valley Hospital)
- Garten
- Legacy Silverton Medical Center

In addition to these funded by STIF or Section 5310, other transit services in Marion and Polk Counties include Tillamook County Transportation District's (TCTD's) 60X and 70X routes, Canby Area Transit's (CAT's) 10X and 20X routes, South Metro Area Regional Transportation's (SMART's) 1X route, Monmouth-

Independence (MI) Trolley, Yamhill County Transit's Route 11, and regional services provided by TriMet, FlixBus/ Greyhound, Amtrak, FlixBus, and Cascades POINT. Table 1 provides a summary of these transportation providers, with more detailed descriptions of each in the subsequent sections.

**Table 1. Transit Providers in Marion and Polk Counties**

Transit Provider	Service Name	Service Type	Operating Hours	Fares	Service Area
<b>Funded by STIF or Section 5310</b>					
<b>Cherriots</b>	Local	Fixed-Route Service	Monday – Friday (M-F) from approximately 6am-11pm; Saturdays from 7am-9pm; Sundays from 8am-8pm	\$1.60 for one-ride pass	Salem-Keizer Urban Growth Boundary (UGB)
	Regional	Fixed-Route Service	Routes run M-F from approximately 6am – 9pm; Weekends from approximately 8:30am – 9pm	\$1.60 for one-ride pass	Marion and Polk Counties
	LIFT	Demand-Response Paratransit (Advanced Registration)	M – F, 6am – 6pm; Weekends, 8am – 4pm	\$3.20 one-way	Salem-Keizer UGB
	Shop and Ride	Demand-Response Shared-Ride for Seniors (60+) and Persons with Disabilities	M – F, 6am – 6pm; Weekends, 8am – 4pm	\$1.25 one-way	Salem-Keizer UGB
	Dial-a-Ride	Demand-Response for Seniors (60+) and Persons with Disabilities	M – F, 6am – 6pm; Weekends, 8am – 4pm	\$3.20 one-way	Salem-Keizer UGB
<b>Woodburn Transit Service (WTS)</b>	Fixed Route	Fixed-Route Service	M – F, 8am – 6pm; Saturdays 9am – 5pm; Sundays 9am – 3pm	-	City of Woodburn
	Fixed Route (Express)	Fixed-Route Service	M – F, 8am – 6pm	-	City of Woodburn
	Dial-a-Ride	Demand-Response for Seniors (60+) and Persons with Disabilities	M – F, 8am – 6pm; Saturdays 9am – 5pm; Sundays 9am – 3pm	-	City of Woodburn
	Volunteer Dial-a-Ride (Medical Appointments)	Availability Dependent on Volunteers - Demand-Response (Medical Appointments)	M – F, 7am – 7pm	-	City of Woodburn

Transit Provider	Service Name	Service Type	Operating Hours	Fares	Service Area
<b>City of Silverton</b>	Silver Trolley	Demand-Response (Advanced Registration) for the General Public	M – F, 9am – 11:30am and 1pm – 4:30pm	-	City of Silverton and/ or Silverton UGB
<b>Salem Health</b>	West Valley Hospital Connections Van	Demand-Response (Medical Appointments)	M – F, 8am – 4pm	-	Polk County
<b>Garten</b>	Garten Services Work Site Van	Demand-Response for Garten Community Employment Department	M – F, Weekends Depending on Planned Activities/ Job Hours	-	Salem-Keizer
<b>Legacy Silverton Medical Center</b>	CareVan	Demand-Response (Medical Appointments)	(Silverton) Tuesday and Wednesday, 8am – 4pm (Woodburn) Tuesday – Friday, 8am, 5pm	-	Legacy Silverton Medical Center and affiliated clinics
<b>Other Transportation Services</b>					
<b>Tillamook County Transportation District (TCTD)</b>	Route 60X and 70X	Fixed-Route Service	Daily, 6am – 9 pm (60X); Weekdays, 8am – 7pm (70X)	\$1.50 for one-way	Serves the Downtown Salem Transit Center and connects to Grand Rond and Lincoln City
<b>Canby Area Transit (CAT)</b>	Route 99X	Fixed-Route Service	M – F, 6am – 8pm; Saturdays 9am to 6pm	M – F, \$1.00; Saturdays are Free	Serves the Bi-Mart in Woodburn and connects to Canby and Oregon City
<b>South Metro Area Regional Transportation’s (SMART)</b>	Route 1X (Partnership with Cherriots; 80X)	Fixed-Route Service	M – F; 5am – 8pm (1X); M – F 6am – 8pm (80X)	\$1.60 for one-way	Wilsonville, Salem, Keizer, and Woodburn
<b>Cherriots</b>	Monmouth-Independence Trolley	Fixed-Route Service	M – F, 7am – 9pm; Saturdays 8am – 10pm; Sundays 8am – 6pm	-	Serves Main Street in Monmouth and Monmouth Street in Independence
<b>Yamhill County Transit</b>	Route 11	Fixed-Route Service	M – F; 6am – 7pm	\$1.25 for single one-way fare	Serves the West Salem Transit Center and connects to Amity and McMinnville



Transit Provider	Service Name	Service Type	Operating Hours	Fares	Service Area
<b>Amtrak</b>	Amtrak Cascades	Fixed-Route Passenger Train Serving Oregon and Washington	Two Daily Round Trips between Portland and Salem	Varies	Stops at Salem Amtrak Station; Serves Oregon and Washington
	Coast Starlight	Fixed-Route Passenger Train (Long Distance)	One Daily Trip in Each Direction; Departs to Salem at 2:04pm; Departs to Albany at 3:39pm	Varies	Stops at Salem Amtrak Station; Oregon, Washington, and California
<b>Greyhound</b>	Greyhound	Fixed-Route Intercity Bus	Varies	Varies	Stops at Woodburn Transit Center; Serves communities across North America
<b>FlixBus</b>	Operated by MTR Western as FlixBus	Fixed-Route Intercity Bus	Varies	Varies	Downtown Salem and two round trips per day to Corvallis, Eugene, and Portland
<b>Cascades POINT</b>	Cascades (Portland-Eugene)	Fixed -Route Intercity Bus	Four Trips and One Express Trip per Day in Each Direction	Adults fares range from \$5 to \$28	Portland to Eugene
<b>Disabled American Veterans Transportation</b>	Veterans Transportation Service (VTA)	Demand-Response Service for Veterans for Transportation to Veterans Hospitals in Portland	Pickups in Salem/ Keizer between 7am – 8am; Return to Salem when the last completed appointment is completed or by 3:00pm, whichever comes first	Free	Portland Metro Area, Salem, Keizer, Brooks, Woodburn, Wilsonville, Aurora

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## STIF & Section 5310 Providers

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### Cherriots

Cherriots, officially the Salem Area Mass Transit District (SAMTD), is the primary public transit and paratransit provider in the Salem/Keizer area and regional fixed-route service provider in broader Marion and Polk Counties. Cherriots services include local fixed-route service, regional fixed-route service, Cherriots LIFT paratransit services, and dial-a-ride service for seniors and people with disabilities. Cherriots (SAMTD) is the qualified entity (QE) for distributing STIF and Section 5310 dollars in the rural and urban areas of Marion and Polk Counties.

Four transit centers allow for convenient transfers to Cherriots Local routes, Cherriots Regional routes, and other regional providers. These include the Downtown Transit Center, Keizer Transit Center, West Salem Transit Center, and Chemeketa Community College near Chemeketa Building 2.

#### Cherriots Local

Cherriots Local provides fixed-route bus service throughout the Salem-Keizer area, 7 days a week. There are 20 Cherriots Local routes operating from 6 am to 11 pm on weekdays, approximately 7am to 9pm on Saturdays, and approximately 8am to 8pm on Sundays. Cherriots Local weekday service ranges from every 15 minutes for Frequent service routes, every 30 minutes for Standard service routes, and 60 minutes for Basic service routes. The Cherriots Local fleet includes 64 buses that can seat up to 38 passengers with standing room for an additional 20 passengers. Figure 1 shows a map of the Cherriots Local network.

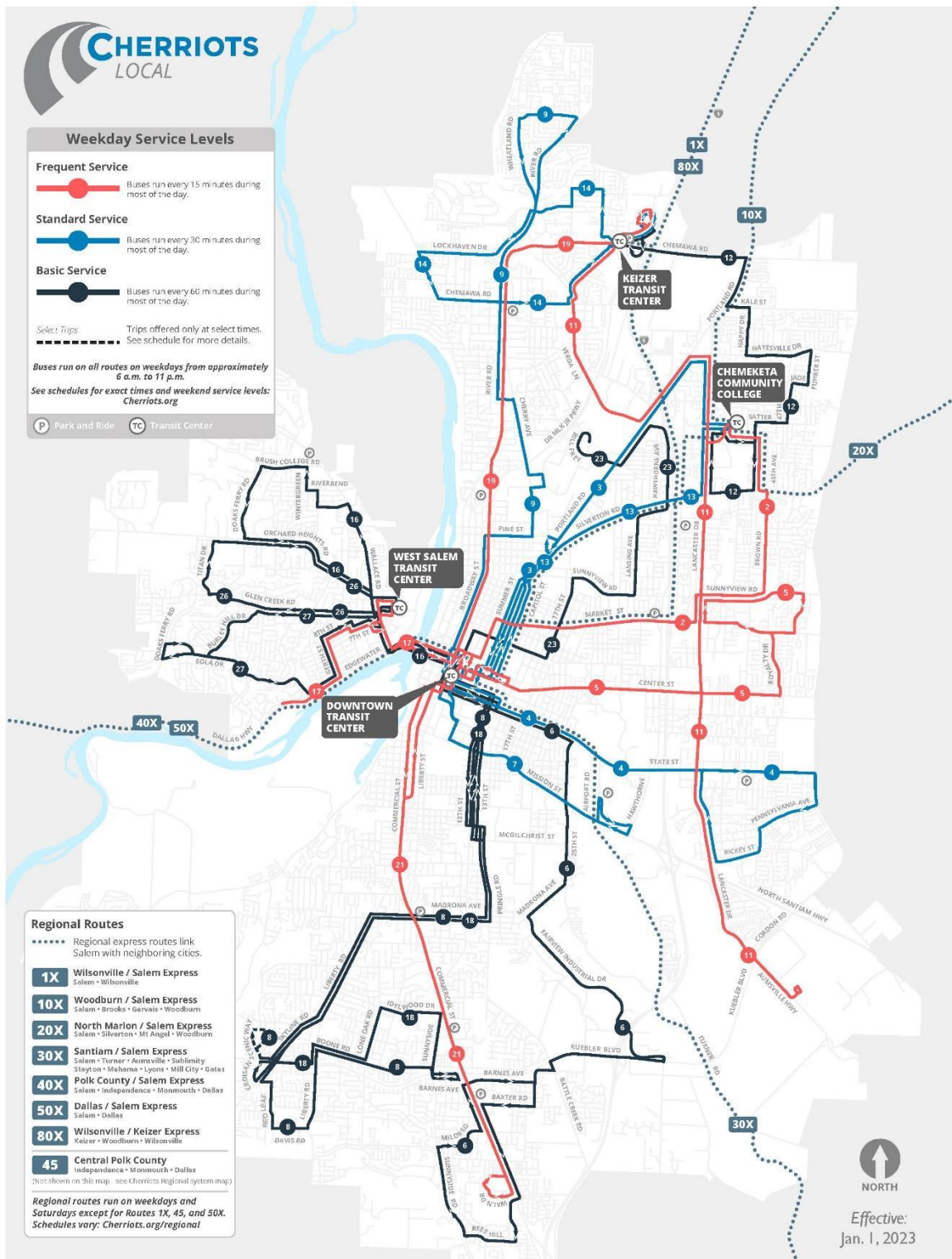
The current passes and fare options as of August 1, 2023, are summarized in Table 2.

**Table 2. Cherriots Local and Cherriots Regional Fares**

Fare Type	Fare	Reduced Fare
One-Ride	\$1.60	\$0.80
Day Pass	\$3.25	\$1.50
Month Pass and 30 Day Pass	\$45.00	\$22.50
Annual Pass	\$540.00	\$270.00
Youth (0-18)	Free	Free

Every Cherriots Local and Regional bus is equipped with a boarding ramp or power lift to ensure ADA compliance and serve clients using a mobility device. Each bus includes a designated securement area that can fit up to two mobility devices.

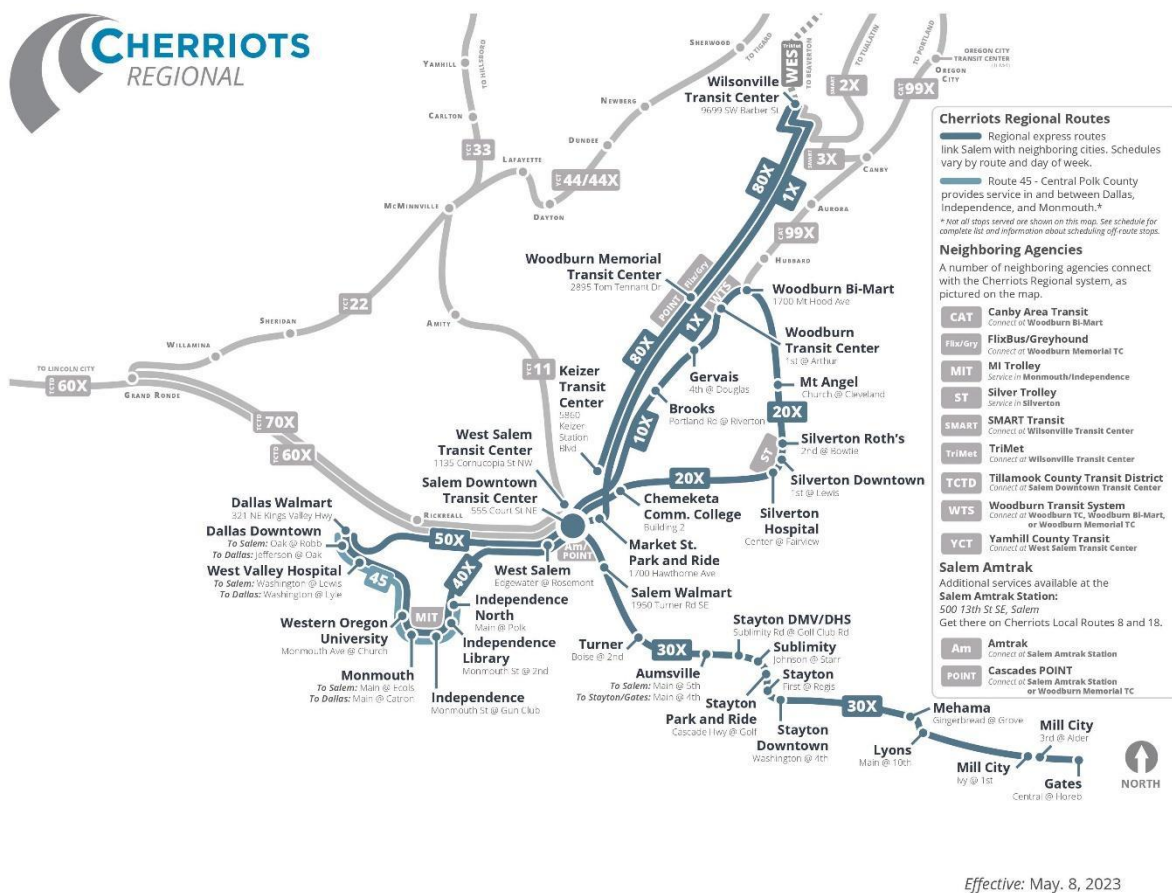
Figure 1. Cherrlots Local Network



## Cherriots Regional

Cherriots Regional routes provide weekday and Saturday services throughout Marion and Polk counties. The Regional routes include Express routes, all connecting to the Salem Downtown Transit Center. Route 45 (Central Polk County) provides service in and between Dallas, Independence, and Monmouth. Neighboring agencies connect with Cherriots Regional to provide additional service within Marion and Polk Counties as well as connections to surrounding areas. These agencies include Canby Area Transit, FlixBus/ Greyhound, MI Trolley, Silver Trolley, SMART, TriMet, Tillamook County Transit District, Woodburn Transit System (WTS), Yamhill County Transit, Amtrak, and Cascades POINT. The Cherriots Regional fleet includes 12 buses. Figure 2 shows a map of the Cherriots Regional network.

Figure 2. Cherriots Regional Network



## Cherriots LIFT

Cherriots LIFT is a shared-use paratransit service that offers origin-to-destination transportation to eligible individuals whose qualifying disabilities prevent them from using the Cherriots Local bus services. The service area for LIFT is all areas in the Salem/ Keizer UGB within ¼ mile of Cherriots Local routes. Eligible participants can schedule a ride with LIFT Monday through Friday 5:30 a.m. to 9 p.m., Saturdays from 6 a.m. to 9 p.m., and Sundays from 8 a.m. to 8 p.m. The Cherriots Local fleet includes 43 buses. The cost is \$3.20 for a one-ride trip.

## Cherriots Dial-a-Ride and Shopper Shuttle

Cherriots Shop and Ride includes a dial-a-ride service and Shopper Shuttle for seniors aged 60 and over and individuals with disabilities. Applications are not required. The dial-a-ride and Shopping Shuttle services pick individuals up at their homes and can take them to any location within the Salem-Keizer UGB (dial-a-ride) or to designated store locations (Shopping Shuttle). Eligible participants can schedule a ride Monday through Friday starting at 8am with final drop-offs by 5pm. The Shop and Ride service is currently suspended until further notice.

## City of Woodburn

Woodburn Transit Service (WTS) is the primary public transportation provider serving the City of Woodburn. WTS operates two fixed-routes services, referred to as the Fixed Route and the Express Route, a dial-a-ride service, and a volunteer medical transportation program. All buses and dial-a-ride vehicles are ADA accessible. Neighboring agencies, including Cherriots, CAT, and Cascades POINT, provide regional connections from Woodburn to surrounding areas. All WTS services are currently free.

Both the Fixed Route and Express Routes operate Monday through Friday, 8am to 6pm. The Fixed Route also operates on Saturdays from 9am to 5pm and Sundays from 9am to 3pm. A fleet of ODOT-owned 12 buses are used on the Fixed and Express routes. A map of the Fixed Route is provided in Figure 2 and the Express Route in Figure 3.

The WTS dial-a-ride provides paratransit services for seniors and people with disabilities within the City of Woodburn. The service operates Monday through Friday from 8am to 6pm, Saturdays from 9am to 5pm, and Sundays from 9am to 3pm.

The City is looking for volunteers to continue the medical transportation program, which was paused during the COVID-19 pandemic and has not yet returned. There are currently two paid staff that provide medical transportation to all areas between Portland and Salem, but due to high demand (10 to 15 calls per day), they have to turn down many of their calls.

Figure 3. WTS Fixed Route

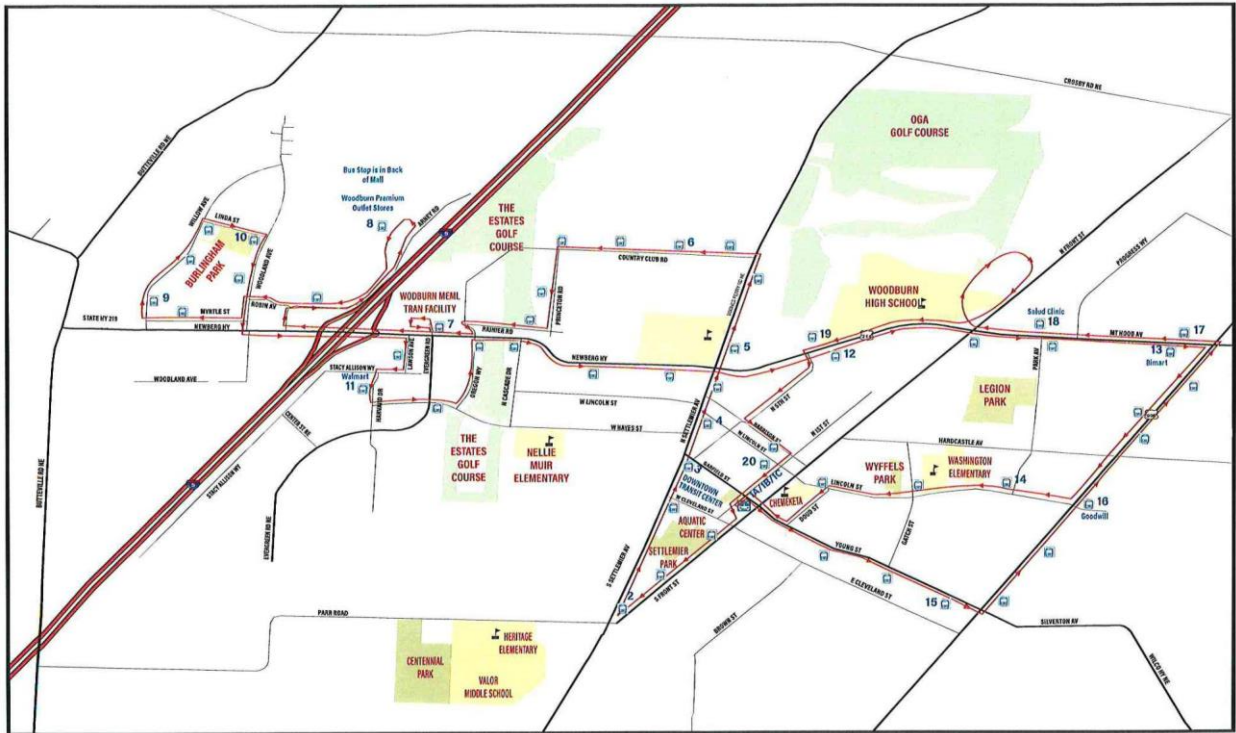
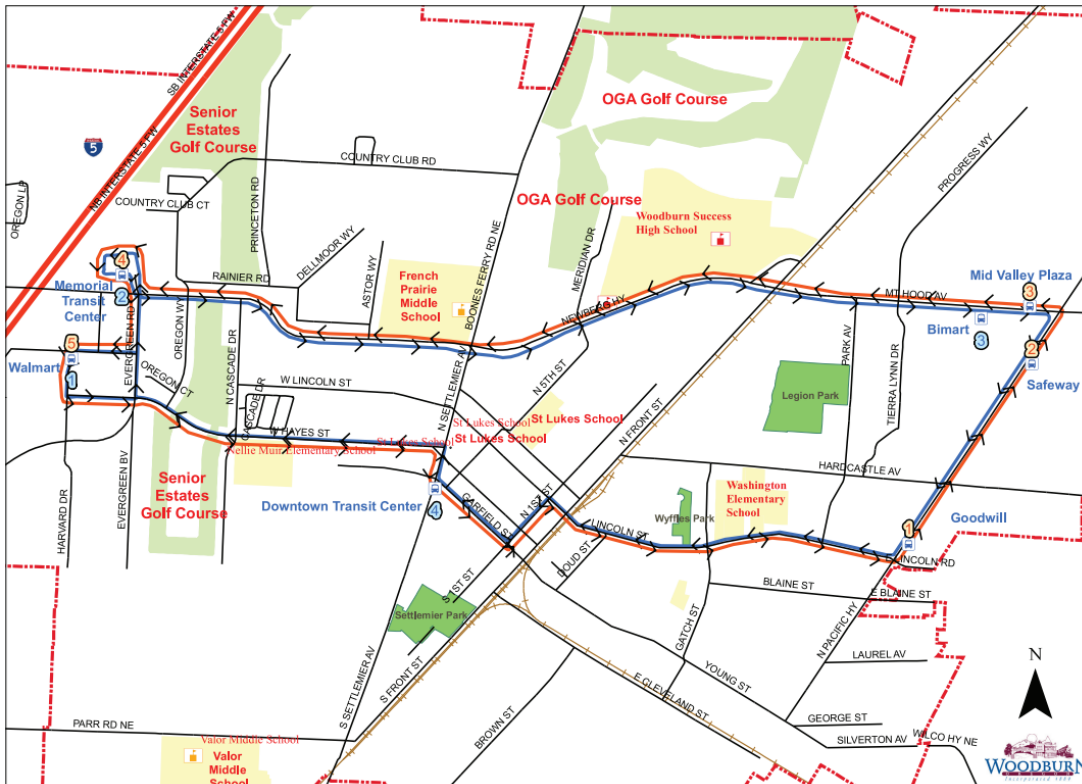


Figure 4. WTS Express Route



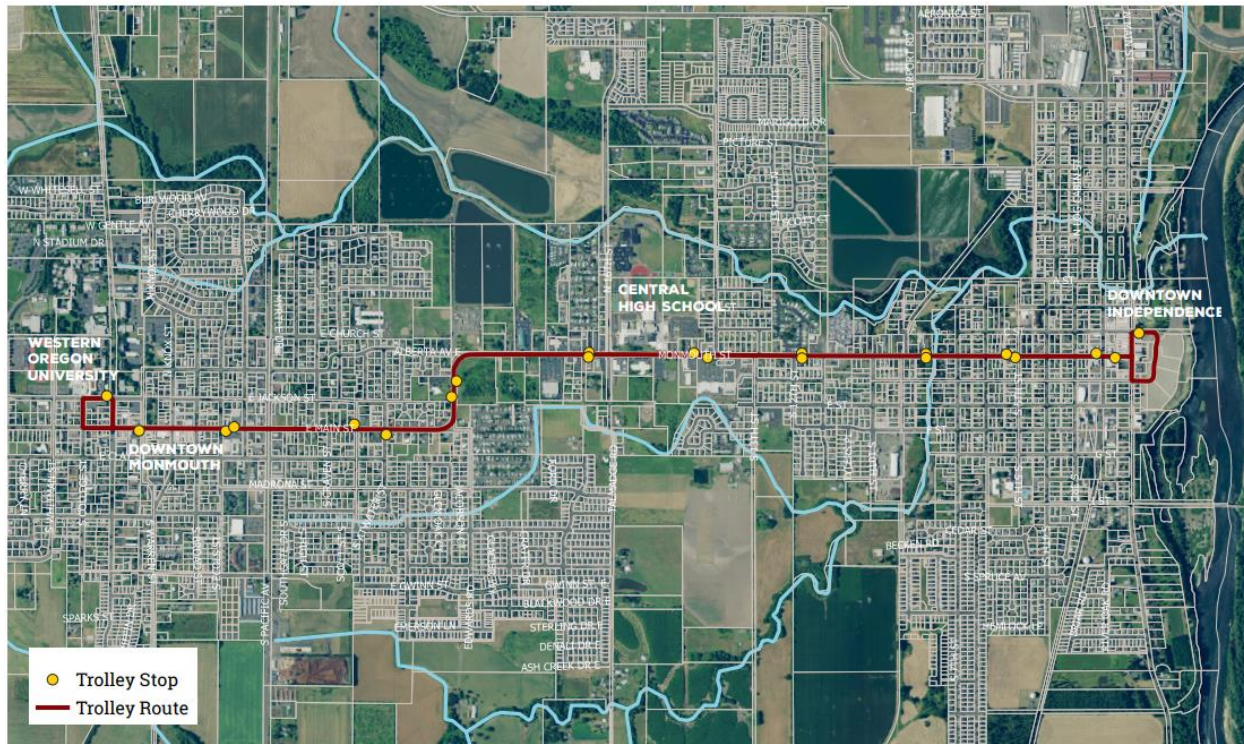
## City of Silverton

The Silver Trolley is a dial-a-ride service providing transportation to the special needs population, youth, seniors, and the general public within the Silverton UGB. The Trolley primarily provides transportation to non-emergency medical appointments, local shopping and dining, and other personal trips within the service area. Operating hours are Monday through Friday from 9am to 11:30 am and 1pm to 4:30pm. Services are free but donations are accepted.

## Monmouth-Independence Trolley

The Monmouth-Independence Trolley is a pilot service providing free and reliable fixed-route public transportation connecting downtown Independence, downtown Monmouth, and the Western Oregon University (WOU) campus. The Trolley operates Monday through Friday from 7am to 9pm, Saturday from 8am to 10pm, and Sundays/holidays from 8am to 6pm. The pilot will operate for two years to determine long-term viability and is currently managed and operated by Cherriots. The service operates two trolleys at a time, each seating 14 passengers plus one wheelchair passenger. Each vehicle is equipped with a fold-out ramp to serve clients with mobility devices and ensure ADA compliance. The MI Trolley route is shown in Figure 1.

Figure 5. MI Trolley Route



## Salem Health (West Valley Hospital)

Salem Health operates the West Valley Hospital Connections Van that provides dial-a-ride services for medical appointments within Polk County. Anyone in Polk County can use the service to go to any medical, dental, or vision provider within Polk County. Common locations include West Valley Hospital and Salem Health Medical Clinics at Monmouth, Uglow Avenue in Dallas, and Miller Avenue in Dallas. The

Connections Van is operated primarily by volunteers. The service is free and available Monday through Friday from 8am to 4pm. The van is wheelchair accessible.

## Garten

Garten Services is a non-profit organization in the Salem area that provides employment, social day activity, and retirement services for people with developmental disabilities and long-term mental illness. Garten provides a Work Site Van that offers transportation for Garten employees to and from job sites, interviews, and small group activities within the Salem-Keizer area. Operations are primarily on weekdays, with some weekend services for employee transportation to weekend job sites. The work vans are ADA accessible. The service is free for Garten employees.

## Legacy Silverton Medical Center

The Legacy Silverton Medical Center provides complimentary rides to and from medical appointments at Legacy Silverton Medical Center and its affiliated clinics, providers, services, and programs. There are two CareVan services, one in Silverton and one in Woodburn. The Silverton CareVan operates Tuesday and Wednesday from 8am to 4pm. The Woodburn CareVan serves both Woodburn and Silverton and operates Tuesday through Friday from 8am to 5pm.

Both services are operated by volunteers and the vehicles are ADA accessible. The CareVan is a curb-to-curb service and can transport people from their households to medical providers affiliated with Legacy Silverton Medical Center.

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## Other Transportation Providers

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Other transportation services in Marion and Polk Counties include:

- **Tillamook County Transportation District (TCTD):** Routes 60X and 70X connect Lincoln City, Grand Ronde, and Salem. There are two stops in Salem, including the Salem Downtown Transit Center and the Salem Amtrak Station. The routes operate Monday through Saturday.
- **Canby Area Transit (CAT):** Route 99X is a fixed-route service on the Highway 99E corridor connecting the Oregon City Transit Center, Canby Transit Center, and the Woodburn Bi-Mart. The route operates Monday through Saturday. The route offers connections to TriMet and the Clackamas County Shuttle at the Oregon City Transit Center, SMART (Wilsonville) at the Canby Transit Center, and Cherriots and Woodburn Transportation Service (WTS) at the Woodburn Bi-Mart.
- **South Metro Area Regional Transportation (SMART):** Routs 1X and 80X provide fixed-route transportation service connecting Wilsonville to Salem, Keizer, and Woodburn. Route 1X travels between Wilsonville Transit Center and Salem Downtown Transit Center. Route 80X connects the Wilsonville Transit Center to Woodburn Memorial Transit Center and the Keizer Transit Center. Both route operate on weekdays only.
- **Yamhill County Transit:** Route 11 provides weekday fixed-route service between McMinnville Transit Center and West Salem Transit Center. The route operates on weekdays only and connects McMinnville, Amity, and Salem.
- **Amtrak:** Amtrak Cascades and Coast Starlight routes include stops at the Salem Train Station. Amtrak Cascades operates in the Pacific Northwest between Eugene, OR, and Vancouver, B.C., including two daily round trips between Portland and Salem. The Coast Starlight provides long-distance service between Los Angeles and Seattle, with one daily trip in each direction at the Salem Train Station.
- **Greyhound:** Greyhound operates intercity bus services across North America. In Marion and Polk Counties, Greyhound buses stop at Woodburn Transit Center.



- **FlixBus:** FlixBus operates intercity bus services across North America and offers two round trips a day from the Salem Downtown Transit Center to Corvallis, Eugene, and Portland.
- **Cascades POINT:** POINT is an intercity bus service operated by ODOT and stops at the Amtrak Station in Salem. The POINT network connects major transit centers across Oregon. Salem is on the Cascades route, which operates between Eugene and Portland.
- **Disabled American Veterans Transportation:** The Veterans Transportation Service (VTS) provides transport for veterans to the VA Medical Center in Portland. The service is free and only available to veterans.

## Mobility Management

Mobility management refers to planning, training, and management activities focused on improving coordination among public transit providers, human service agencies, private providers, and other transportation service providers. The Cherriots Mobility Management Work Plan identifies goals, objectives, outcomes, and performance measures for mobility management, including:

- Promote Accessibility and Livability
- Focus on the Individual
- Improve Coordination
- Foster Education and Awareness

The goals and objectives of the Mobility Management Work Plan will be considered in the development of priorities and strategies for the Cherriots Coordinated Transit Plan Update for Marion and Polk Counties.

## Discontinued Services

Two services had been previously operated, but since discontinued, in Marion and Polk Counties, described as follows:

- **Falls City Direct Connect (discontinued):** The Falls City Direct Connect was a free shuttle that provided transportation to critical services in Dallas and Monmouth/ Independence. The service connected people to health, social, employment, and educational opportunities. The shuttle operated on Tuesdays and Thursdays to Dallas and once a month to Monmouth. Two of the stops connected to Cherriots Route 40X.
- **Non-Emergent Medical Transportation (NEMT):** Cherriots previously provided NEMT service in Marion and Polk Counties. NEMT service is now provided by LogistiCare.

## APPENDIX E: MEMO #4 – GOALS AND OBJECTIVES

# Technical Memorandum

January 30, 2024

Project# 29131

To: Ted Stonecliffe, PMP, and Chris French  
Salem Area Mass Transit District  
555 Court St NE, Suite 5230  
Salem, OR 97301

From: Susan Wright, PE, PMP, Krista Purser, PE, and Katie Popp, Kittelson and Associates, Inc.

RE: 2024 Cherriots Coordinated Plan Update for Marion and Polk Counties

## GOALS AND OBJECTIVES

Goals and Objectives .....	1
Introduction .....	1
Review of Relevant Plans .....	1
Outreach Findings .....	4
Draft Goals and Objectives .....	5
Next Steps .....	6

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## Introduction

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The purpose of the 2024 Cherriots Coordinated Plan Update is to serve as the guiding document that supports coordination amongst public transit and human service transportation providers to ensure that key populations in Marion and Polk Counties are served as efficiently as possible. The goals and objectives identified in the Coordinated Plan Update focus on the transportation needs, gaps, and challenges of seniors and people with disabilities in Marion and Polk Counties. The Plan Update supports the development of long-term funding strategies for the Salem Area Mass Transit District ("District"), or Cherriots, the qualified entity for determining how Statewide Transportation Improvement Fund (STIF) and Section 5310 (§5310) dollars are spent in the rural and urban areas of Marion and Polk Counties. This memorandum documents the goals and objectives of the 2024 Cherriots Coordinated Plan Update.

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## Review of Relevant Plans

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The goals and objectives established in the 2024 Cherriots Coordinated Plan Update will consider relevant state and previous District plans to ensure that the Coordinated Plan Update aligns with long-term public transit goals. These plans support the development of strategies to enhance public transit in Marion and Polk counties, with a focus on the needs of seniors and people with disabilities. The following sections present relevant goals, objectives, and performance measures of relevant plans and policies, including:

- Oregon Public Transportation Plan (2018)
- Cherriots Coordinated Transportation Human Services Plan (Coordinated Plan, 2019)
- Cherriots Long Range Transit Plan (LRTP) (2022)
- Cherriots Strategic Plan (FY 2024)

## Oregon Public Transportation Plan (OPTP) (2018)

The Oregon Public Transportation Plan (OPTP) outlines a long-term vision for public transportation in Oregon. The purpose of the OPTP is to provide guidance for transportation agencies to establish planning and investment strategies to advance public transportation in communities across the state. The OPTP alongside the Oregon Transportation Plan (OTP) fulfills state and federal planning requirements for comprehensive long-range multimodal transportation planning. In particular, the OPTP provides guided criteria for STIF funding and supports requirements and priorities for distribution of STIF funding. The OPTP establishes ten goals that support the long-range vision for public transportation in Oregon:

- Goal 1: Mobility – Public Transportation User Experience
- Goal 2: Accessibility and Connectivity – Getting from Here to There
- Goal 3: Community Livability and Economic Vitality
- Goal 4: Equity
- Goal 5: Health
- Goal 6: Safety and Security
- Goal 7: Environmental Sustainability
- Goal 8: Land Use
- Goal 9: Funding and Strategic Investment
- Goal 10: Communication, Collaboration, and Coordination

## Cherriots Coordinated Plan (2019)

The 2019 Cherriots Coordinated Plan Update establishes five priorities identified from findings of the needs assessment. These priorities are listed in descending order, with one being the highest priority:

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 priorities should be included as part of the updated Coordinated Plan. These priorities should guide the decisions made by Cherriots to implement the plan including how to evaluate funding applications.

- Maintain/improve/expand existing services, increase capacity/hours, improve service quality, and avoid service reductions, in both urban and rural areas.
- Provide 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 and 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.

These priorities are reflected in a list of strategies that were developed to target transportation needs of seniors and people with disabilities. Strategies were organized into five categories: Transportation Service; Infrastructure; Coordination and Organization; Marketing, Customer Service, and Outreach; Technology; and Capital and Funding strategies.

The 2024 Cherriots Coordinated Plan Update will differ from the previous plan by identifying Goals and Objectives as a distinct section of the plan. The Goals and Objectives are less specific than the priorities and strategies in the previous plan. Prioritization will occur at later stages of the Plan Update process.

The goals and objectives for the 2024 Cherriots Coordinated Plan Update consider these priorities and strategies from the 2019 Plan Update.

## Cherriots Long Range Transit Plan (LRTP) (2022)

The Cherriots Long Range Transit Plan (LRTP) is the first 20-year planning document for the District. The LRTP frames strategies and actions that can be implemented by the District to ensure an efficient and safe transit system for the next 20 years. The development of the LRTP included extensive in-person and virtual public engagement activities, including representatives from key populations such as seniors, low-income individuals, and people experiencing physical, intellectual, or developmental disabilities and visual impairments.

The LRTP defines six strategies that meet the long-range vision, mission, values, and priorities established by the District. These strategies include:

1. Meeting commitments on existing service goals
2. Adding service frequency and reliability to Cherriots Local and Regional routes
3. Building Cherriots into a Mobility Integrator
4. Enhancing bus stops and transit centers
5. Building partnerships with local jurisdictions for service expansion and land use integration
6. Becoming a leader in environmental sustainability through clean transportation choices

## Cherriots Strategic Plan (FY 2024)

The Salem Area Mass Transit District (SAMTD) Strategic Plan establishes four core areas of service/operation and a series of work plan tactics to improve performance. The core areas and their associated organizational work tactics are summarized below.

- **1: Community Value**
  1. Initiate Development of a Climate Action Plan
  2. Integration of Battery Electric Buses / Zero-Emission Awareness
  3. Access
  4. Community Value Surveys
- **2: Customer Satisfaction**
  1. Customer Satisfaction Survey
  2. E-fare Implementation
  3. Cherriots Intelligent Transportation System (CITS)
  4. Clean and Safe Passenger Amenities
- **3: Culture of Ownership**
  1. Merit-Based Performance Management System

2. Management and Resource Tracking Instrument (MARTI)
  3. Diversity, Equity, and Inclusion (DEI)
  4. Employee Engagement Survey
- **4: Financial Sustainability**
    1. Financial Story (Revenue sources)

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## Outreach Findings

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From September to November 2023, the project team engaged with about 150 community members through five in-person events and one online event. An online survey had 163 people participate, with over 100 answering all questions. The goal of these engagement events was to discuss transportation needs of seniors and people with disabilities in Marion and Polk Counties.

The project team also conducted stakeholder interviews with transit providers in Marion and Polk counties, including the City of Woodburn, City of Independence, Polk County Family and Community Outreach Department, and Salem Health. The objective of the interviews was to learn more about transit needs, gaps, and opportunities for seniors and people with disabilities. Key takeaways from provider calls are summarized below.

Key findings from these activities are summarized below.

### Needs Identified through Public Involvement Events

- **Maintain on-demand services** and enhance on-demand options for medical services.
- **Increased frequency of fixed-route** services is desired, especially for connections to Salem and Portland.
- **Increased transit service for local circulators** in Silverton, Monmouth-Independence, and Dallas are needed, with opportunities for deviating from fixed routes to eliminate the challenge of getting to and from transit stops.
- **Education and marketing** about what services are available and how to use them. Outreach and marketing for the travel training services offered by Cherriots will promote awareness of the program.

### Needs Identified through the Online Survey

- **Increased transit service frequency**, including direct service to Santiam Hospital, more local service frequency in Salem-Keizer, service to Falls City, and more regional connections beyond County lines.
- **Service locations/ transit stops** closer to where they want to go, including closer to specific neighborhoods within Salem-Keizer, connections to rural and regional destinations, and grocery stores.
- **More amenities at bus stops. Shelters, benches, trash receptacles, and lighting are needed.**
- Respondents valued the **friendly drivers and staff, availability of services, and affordability** – especially for seniors.

### Needs Identified through Provider Input

- **Increased transit service to rural communities** in Marion and Polk Counties is desired, especially to provide transit options for residents to access essential medical or other life services.
- **Support or enhancement of volunteer driver programs** to ensure consistency and reliability of the service.

- **Outreach, marketing, and education** about transit and travel training programs are desired. Route finding using Cherriots web page is challenging with the existing platform.
- Additional coordination for **first- and last-mile travel** is needed. Traveling to and from transit stops on pedestrian facilities can be difficult or even completely inaccessible for people with physical disabilities, vision or hearing impairments, and those using a mobility device.
- **Safer and more comfortable transit stops** are desired. Shelters, benches, trash receptacles, and lighting are needed.
- **Funding** is an ongoing challenge.
- Additional **coordination between transit programs**, including medical service vans, would encourage more efficient sharing of information amongst providers.

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## Draft Goals and Objectives

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The review of relevant plans, feedback from public engagement, and discussions with the District formed the basis for the draft goals and objectives for the Coordinated Plan Update. The three draft goals and associated objectives for each goal are summarized below.

### **Goal 1: Provide safe and reliable transportation options that are equitable and accessible to all users, with a focus on seniors and people with disabilities.**

#### ***SAMTD Strategic Plan Core Area(s): Community Value and Customer Satisfaction***

- Objective 1A: Seek opportunities to increase service frequency and coverage in both urban and rural areas of Marion and Polk counties.
- Objective 1B: Increase access to key destinations by balancing stop locations, especially near essential medical and grocery services.
- Objective 1C: Improve the safety and accessibility of transit options and all parts of a rider's journey.
- Objective 1D: Maintain communication and marketing, in multiple languages, to increase public awareness of available transit options.
- Objective 1E: Enhance the availability of information about services and how to ride them, in particular via travel training programs.

### **Goal 2: Maintain and expand transportation options in Marion and Polk Counties via partnerships with other programs and providers.**

#### ***SAMTD Strategic Plan Core Area(s): Community Value and Customer Satisfaction***

- Objective 2A: Foster support for medical transportation providers and coordinate with medical centers to ensure access for patients.
- Objective 2B: Seek opportunities to enhance carpool or vanpool programs, potentially via volunteer-based programs.
- Objective 2C: Continue to connect and coordinate local and regional transit options, including those beyond Marion and Polk counties.
- Objective 2D: Promote coordination with human service agencies, senior centers, and other community resource groups to provide equitable resources and transportation to all users.

## **Goal 3: Enhance Cherriots and others' stability in order to provide reliable transportation options.**

### ***SAMTD Strategic Plan Core Area(s): Funding Sustainability and Culture of Ownership***

- Objective 3A: Develop guidelines, prioritization criteria, and other decision-making mechanisms that support implementation of strategies addressing the needs of key populations.
- Objective 3B: Seek additional funding to maintain and enhance service options.
- Objective 3C: Monitor opportunities for cost-saving measures, especially those that promote and extend other goals such as alternative fuels.
- Objective 3D: Continue to recruit, train, and retain staff.

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## Next Steps

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Cherriots reviewed the proposed draft goals and objectives and provided feedback to the project team. The goals and objectives will serve as the basis for developing and prioritizing strategies as part of the 2024 Cherriots Coordinated Plan Update.



# APPENDIX F: SAMPLE GRANT APPLICATIONS AND INSTRUCTIONS

# Section 5310 Program Management Plan Update

SAMTD Board of Directors Meeting 3-28-24



## Introduction to the 5310 Program Management Plan

1. Document Purpose
2. Difference Between 5310 PMP and Coordinated Plan
3. Outline of 5310 PMP
4. Proposed Change to Process
5. Needs and Strategies Same as Coordinated Plan
6. Questions

## Purpose

- Plan for administering Section 5310 (Enhanced Mobility of Seniors and Individuals with Disabilities) program funds SAMTD receives directly from FTA
- These funds can only be used within the Salem and Keizer Urban Growth Boundary
- Different plan from Oregon's State Management Plan, which governs 5310 funds for projects outside the UGB

## Difference between 5310 PMP and the Coordinated Plan

- Section 5310 PMP governs funding for projects only within the UGB
  - Historically, this has funded the Cherriots Shop and Ride program and a van for Garten to take employees and clients to work sites
- Coordinated Plan guides STIF and 5310 funding decisions for Marion and Polk Counties (including the Salem-Keizer UGB)

# Outline of 5310 PMP

1. Introduction and Description of Program
  1. Eligible Sub-recipients
2. Program Priorities
3. Roles and Responsibilities of SAMTD and its Sub-recipients
4. Coordination Including Public Participation
5. Project Selection Criteria and Method of Distributing Funds

# Outline of 5310 PMP (continued)

6. Annual Program of Projects Development and Approval Process
7. Administration, Planning, and Technical Assistance of 5310 Grant Funds
8. Transfer of Funds
9. Private Sector Participation
10. Civil Rights
11. Reporting
12. Program Management
13. Other

## Proposed Change to Approval Process

- Elimination of the Technical Advisory Committee (TAC)
- Justification for change

## Needs and Strategies List

- Slightly modified from that of the Coordinated Plan to account for the funding geography (UGB only)



SECTION 5310

# PROGRAM MANAGEMENT PLAN

*Enhanced Mobility for Seniors and People with Disabilities*

*March 2024*



## **TABLE OF CONTENTS**

<b>1. INTRODUCTION</b> .....	6
1.1 Definitions	7
1.2 Funding for projects and program administration	11
1.3 The designated recipient for the Section 5310 Program	12
1.4 Eligible sub-recipients	12
1.4.1 <i>Private Taxi Operators as Sub-recipients</i>	13
1.5 Eligible activities	
<b>2. PROGRAM PRIORITIES</b> .....	16
2.1 A coordinated planning process	16
<b>3. ROLES AND RESPONSIBILITIES</b> .....	25
3.1 SAMTD roles and responsibilities	25
3.2 Sub-recipient roles and responsibilities	27
<b>4. COORDINATION</b> .....	28
4.1 Public participation process	28
<b>5. PROJECT SELECTION CRITERIA AND METHOD OF DISTRIBUTING FUNDS</b> .	30
<b>6. ANNUAL PROGRAM OF PROJECTS DEVELOPMENT AND APPROVAL PROCESS</b> .....	32
6.1 Appeals of project selection process	35
<b>7. ADMINISTRATION, PLANNING, AND TECHNICAL ASSISTANCE</b> .....	35
<b>8. TRANSFER OF FUNDS</b> .....	36
<b>9. PRIVATE SECTOR PARTICIPATION</b> .....	36
<b>10. CIVIL RIGHTS</b> .....	37
10.1 SAMTD responsibilities	38
10.2 Sub-recipient responsibilities	38



10.3 Environmental justice	40
<i>SAMTD responsibilities</i>	40
<i>Sub-recipient responsibilities</i>	40
10.4 Disadvantaged Business Enterprise program	40
<i>SAMTD roles and responsibilities</i>	41
10.5 Equal Employment Opportunity	41
<b>11. SECTION 504 AND ADA REPORTING</b> .....	42
11.1 Summary of ADA requirements	43
<b>12. PROGRAM MEASURES</b> .....	44
12.1 Quarterly reports	44
12.2 Annual reports	45
12.3 National Transit Database (NTD) reporting	45
12.4 Performance measures	45
<b>13. PROGRAM MANAGEMENT</b> .....	46
13.1 Management of sub-recipients	46
13.1.1 <i>Monitoring and reporting</i>	47
13.1.2 <i>Procurements including debarment and suspension</i>	47
13.1.3 <i>Financial management including FTA electronic grant management</i>	
System	47
13.1.4 <i>Property management and vehicle use</i>	47
13.1.5 <i>Agreements, accounting system, closeout, and audits</i>	48
<b>14. OTHER PROVISIONS</b> .....	48
14.1 Environmental protection	48
<i>SAMTD responsibilities</i>	49
<i>Sub-recipient responsibilities for categorical exclusions</i>	49
14.2 Buy America provisions, pre-award/post-delivery certifications, and new model bus testing	50
<i>Pre-award and post-delivery certifications</i>	50
14.2.1 <i>New model bus testing</i>	51
<i>SAMTD responsibilities</i>	51

<i>Sub-recipient responsibilities</i>	51
14.3 Lobbying	52
<i>SAMTD responsibilities</i>	52
<i>Sub-recipient responsibilities</i>	52
14.4 Prohibition of exclusive school transportation	53
<i>SAMTD responsibilities</i>	54
<i>Sub-recipient responsibilities</i>	54
14.5 Drug and alcohol testing regulations	54
<i>SAMTD responsibilities</i>	55
<i>Sub-recipient responsibilities</i>	55

## **APPENDICES**

<b>Appendix A:</b> Sample Public Notice .....	A-2
<b>Appendix B:</b> Sample Web Article .....	A-3
<b>Appendix C:</b> Sample Grant Application: 5310 (FTA) .....	A-5
<b>Appendix D:</b> Sample Application Instructions: 510 (FTA) .....	A-16
<b>Appendix E:</b> Eligible Activities Including Those That Meet the 55 Percent Requirement .....	A-22
<b>Appendix F:</b> SAMTD Board of Directors' Guiding Principles .....	A-27

# 1. INTRODUCTION

The Program Management Plan (PMP) describes the Salem Area Mass Transit District (SAMTD dba Cherriots) policies and procedures for administering the Federal Transit Administration's (FTA) 49 U.S.C. 5310 (Section 5310) Enhanced Mobility of Seniors and Individuals with Disabilities program. SAMTD is a designated recipient of FTA Section 5310 funds. SAMTD also receives funds through the Oregon Department of Transportation (ODOT) 5310 program for urban and rural projects. This PMP addresses only the Section 5310 dollars obtained directly from the FTA. The ODOT Public Transportation Division State Management Plan should be consulted for the pass-through ODOT 5310 grant program.

The PMP articulates a vision for SAMTD'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. SAMTD has identified a growing need for public transportation in the Salem-Keizer area, with a focus to connect individuals with employment, education, and vital services. The focus of Section 5310 programs is to provide transportation for seniors and individuals with disabilities where public transportation is insufficient, inappropriate, or unavailable.

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

The PMP serves as a local companion to FTA Circular 9070.1G by describing the roles and mechanisms for carrying out policies and procedures in the Salem-Keizer Urbanized Area (UZA) and meeting the FTA requirement for a Program Management Plan.

The Federal Transportation Bill, Infrastructure Investment and Jobs Act (IIJA), continues the changes made by the previous federal legislation bill: Fixing America's Surface Transportation (FAST) Act. FAST legislation brought about many changes to FTA programs when it was signed in December 2015. The IIJA passed in March 2021, and did not affect policies related to this Program Management Plan (PMP). This plan is developed to specifically meet Section 5310 guidance as provided in FTA Circular 9070.1G. Chapter VII details the requirements for developing a PMP, including the purpose and content.

## 1.1 Definitions

**ADA** – Americans with Disabilities Act

**C\_9070.1G** – A circular authored by the FTA detailing the Section 5310 “Enhanced Mobility of Seniors and Individuals with Disabilities Program Guidance and Application Instructions” program, dated July 7, 2014.

**Capital project:** A category of reimbursable project expenses that includes all activities identified in 49 U.S.C. 5302(3).

**CFR** – Code of Federal Regulations

**Coordinated Public Transit-Human Service Transportation Plan (Coordinated Plan)** – A locally developed, coordinated transportation plan that identifies the transportation needs of individuals with disabilities, seniors and people with low-incomes, provides strategies for meeting those needs, and prioritizes transportation services for funding and implementation.

**DBE** – Disadvantaged Business Enterprise

**DCE** – Documented Categorical Exclusion

**Designated recipient** – An entity designated, in accordance with the planning process under sections 5303 and 5304 of title 49, United States Code, by the governor of a state, responsible local officials, and publicly owned operators of public transportation, to receive and apportion amounts under 49 U.S.C. 5336 to urbanized areas of 200,000 or more in population; or a state or regional authority, if the authority is responsible under the laws of a state for a capital project and for financing and directly providing public transportation.

**Direct recipient** – An entity that receives funding directly from FTA. For purposes of this circular, a direct recipient is a state or a designated recipient.

**Disability** – The term disability has the same meaning as in section 3(1) of the Americans with Disabilities Act of 1990 (42 U.S.C. 12102). The term “disability” means, with respect to an individual — (A) a physical or mental impairment that substantially limits one or more major life

activities of such individual; (B) a record of such an impairment; or (C) being regarded as having such an impairment.

**DOT** – U.S. Department of Transportation

**EEO** – Equal Employment Opportunity

**Equipment** – An article of nonexpendable, tangible personal property having a useful life of more than one year and an acquisition cost that equals or exceeds the lesser of the capitalization level established by the governmental unit for financial statement purposes, or \$5,000. Equipment includes rolling stock and all other such property used in the provision of public transit service.

**FAST** – Fixing America’s Surface Transportation

**FMVSS** – Federal Motor Vehicle Safety Standards

**FTA** – Federal Transit Administration

**IJA** – Infrastructure Investment and Jobs Act

**JARC** – Job Access and Reverse Commute

**MIS** – Management Information System

**Mobility management** – Consists of short-range planning and management activities and projects for improving coordination among public transportation and other transportation service providers carried out by a recipient or sub-recipient through an agreement entered into with a person, including a government entity, under 49 U.S.C. chapter 53 (other than section 5309). Mobility management does not include operating public transportation services.

**MWVCOG** – Mid-Willamette Valley Council of Governments, which is the Metropolitan Planning Organization (MPO) for the Salem-Keizer UGB.

**Nonprofit organization** – A corporation or association determined by the Secretary of the Treasury to be an organization described by 26 U.S.C. 501(c) which is exempt from taxation under 26 U.S.C. 501(a) or one which has been determined under state law to be nonprofit and for which the designated state agency has received documentation certifying the status of the nonprofit

organization.

**NTD** – National Transit Database

**ODOT** – Oregon Department of

Transportation **OMB** – Office of

Management and Budget

**Operating expenses** – Those costs necessary to operate, maintain, and manage a public transportation system. Operating expenses usually include such costs as driver salaries, fuel, and items having a useful life of less than one year.

**PMP** – Program Management Plan

**POP** – Program of Projects

**Preventive maintenance** – All maintenance costs related to vehicles and non-vehicles. Specifically, it is defined as all the activities, supplies, materials, labor, services, and associated costs required to preserve or extend the functionality and serviceability of the asset in a cost effective manner, up to and including the current state of the art for maintaining such an asset.

**Public transportation** – Regular, continuing shared-ride surface transportation services that are open to the general public or open to a segment of the general public defined by age, disability, or low-income, and does not include: intercity passenger rail transportation provided by Amtrak, intercity bus service, charter bus service, school bus service, sightseeing service, courtesy shuttle service for patrons of one or more specific establishments, or intraterminal or intrafacility shuttle services.

**Qualified Entity** – A county in which no part of a mass transit district or transportation district exists, a mass transit district, a transportation district or a federally recognized tribe.

**SAMTD** – Salem Area Mass Transit District

**Section 504** – Section 504 of the Rehabilitation Act of 1973 which protects qualified individuals from discrimination based on their

disability

**Section 5310** – Chapter 49 of the U.S. Code, Section 5310: grant program: “Enhanced Mobility of Seniors and Individuals with Disabilities Program”

**Senior** – An individual who is 65 years of age or older.

**STIF** – State Transportation Improvement Fund

**STIFAC** – State Transportation Improvement Fund Advisory Committee

**Sub-recipient** – A state or local governmental authority, a private nonprofit organization, or an operator of public transportation that receives a grant under Section 5310 indirectly through a recipient.

**TIP** – Transportation Improvement

Program

**Traditional Section 5310 projects** – Those public transportation capital projects planned, designed, and carried out to meet the special needs of seniors and individuals with disabilities when public transportation is insufficient, inappropriate, or unavailable.

**Title VI** – Title VI of the Civil Rights Act of 1964

**UGB** – Urban Growth Boundary

**UZA** – Urbanized Area

## 1.2 Funding for projects and program administration

Section 5310 Program funds will be awarded on an annual cycle. The Section 5310 Program can fund up to 80 percent of a project's capital costs (in some limited cases, up to 90 percent) and up to 50 percent of a project's operating costs.

Administrative costs necessary for the designated recipient to coordinate the Section 5310 Program (up to 10 percent of the federal apportionment to each urbanized area) are funded at 100 percent federal share. Eligible administrative expenses include general overhead costs, planning, technical services, and other eligible costs described in the Office of Management and Budget (OMB) Circular 2 CFR 200.

The designated recipient is eligible to be reimbursed for Section 5310 administrative costs. Sub-recipients will not be reimbursed for administrative costs related to application development, program reporting, or other activities.

The remaining costs (typically the required match for the federal funds) can be covered by:

- Other federal (non-DOT) transportation funding sources
- State and local funding sources
- Private funding sources

It is the responsibility of the sub-recipient to secure and administer funds outside the Section 5310 program.

The requirements for local match of federal funds are detailed in Chapter III, item 16 of the C.9070.1G document (p. III-16 and III-17). SAMTD does not require a local funding match greater than the federal requirement. In general, a 20 percent local match is required for capital projects and a 50 percent local match is required for operating costs.

The Statewide Transportation Improvement Fund (STIF) Formula Program administered by the ODOT Public Transportation Division is can be used for the local match of Section 5310 projects. STIF dollars are formula funds appropriated by the State legislature each biennium based on population, application, and administrative cost allocation. They originate as an employee



payroll tax collected by each county except for the former “Special Transportation Fund,” which originates in state cigarette, photo ID card, and non-highway gasoline taxes.

### **1.3 The designated recipient for the Section 5310 Program**

The governor of each state, or an official designee, and responsible local officials must designate a public entity in a large urbanized area with a population of 200,000 or more to be the recipient of Section 5310 funds. SAMTD is the designated entity for the Salem-Keizer UZA, which has an approximate 2024 population of 244,600 according to the 2018-2022, five-year average estimates of the American Community Survey (U.S. Census Bureau), inflated to 2024.

The designated recipient must have the requisite legal, financial, and staffing capabilities to receive and administer federal funds under this program, which involves managing grant agreements with sub-recipients, applying for federal funds, ensuring compliance with all federal and state requirements, and completing grant reporting to the FTA.

To distribute Section 5310 Program funds within the Salem-Keizer UZA, SAMTD staff manage a competitive selection process and ensure a fair distribution of Section 5310 funds through a fair selection and prioritizing of projects for funding. SAMTD staff also prepare and maintain the PMP. The process for selecting projects is further described in Section 6.

The designated recipient is primarily responsible for applying to FTA for Section 5310 grants on behalf of itself and/or the sub-recipient(s). In addition, the designated recipient is responsible for the development of a Program of Projects (POP), which identifies the sub-recipients and projects for which the recipient is applying for financial assistance. In the Salem-Keizer UZA, SAMTD staff will prepare the POP for submission to the FTA. In addition, the designated recipient manages all aspects of grant distribution, including reporting to the FTA.

### **1.4 Eligible sub-recipients**

SAMTD as a designated recipient of Section 5310 funds, may allocate

apportioned funds to eligible sub-recipients that are limited to:

1. A private non-profit organization; or
2. A state or local governmental authority that:
  - a. Is approved by a state to coordinate services for seniors and individuals with disabilities; or
  - b. Certifies that there are no non-profit organizations readily available in the area to provide the service (C\_9070.1G, p. II-1 & II-2).

SAMTD does not have any eligibility requirements more restrictive than the federal guidance.

The eligible sub-recipients within the Salem-Keizer UZA for traditional Section 5310 projects are:

- State, county, tribal, or local government authorities who are approved by SAMTD to coordinate services for seniors and individuals with disabilities;
- Private non-profit organizations that 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<sup>1</sup> listing all non-profit agencies with current business registrations. SAMTD checks the status of nonprofit 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).

Other applicant qualifications are listed in **Appendix E**.

### ***1.4.1 Private Taxi Operators as Sub-recipients***

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<sup>1</sup> <https://sos.oregon.gov/business/Pages/nonprofit.aspx>, accessed 3/8/2024.

Private operators of public transportation are eligible sub-recipients. The definition of “public transportation” includes “... shared-ride surface transportation services ...” Private taxi companies that provide shared-ride taxi service to the general public on a regular basis are operators of public transportation, and therefore eligible sub-recipients. “Shared-ride” means two or more passengers in the same vehicle who are otherwise not traveling together. Similar to general public and ADA demand response service, every trip does not have to be a shared ride in order for a taxi company to be considered a shared-ride operator, but the general nature of the service must include shared rides.

## 1.5 Eligible activities

Section 5310 funds are available for capital and operating expenses to support the provision of transportation services to meet the specific needs of seniors and individuals with disabilities.

Section 5310(b) provides that of the amounts apportioned to states and designated recipients, not less than 55 percent shall be available for traditional Section 5310 projects – those public transportation capital projects planned, designed, and carried out to meet the specific needs of seniors and individuals with disabilities when public transportation is insufficient, unavailable, or inappropriate. The 55 percent is a floor, not a ceiling – recipients may use more than 55 percent of their apportionment for this type of project.

Funds for the Section 5310 program are available for capital expenses as defined in Section 5302(3) to support public transportation capital projects planned, designed, and carried out to meet the special needs of seniors and individuals with disabilities when public transportation is insufficient, unavailable, or inappropriate.

Examples of capital expenses that meet the 55 percent requirement, which must be carried out by an eligible recipient or sub-recipient as described in the appendix of this plan, include but are not limited to:

- Section 5310-funded vehicles and facilities:
  - Rolling stock and related activities
  - Passenger facilities
  - Support facilities and equipment
  - **All vehicles purchased with Section 5310 funding must be ADA**

**accessible.**

- A lease of equipment when lease is more cost-effective than purchase
- An acquisition of transportation services under a contract, lease, or other arrangement
- Support for mobility management and coordination programs among public transportation providers and other human service agencies providing transportation
- Purchase of capital activities to support ADA-complementary paratransit service

Projects must directly serve and have a specific benefit to seniors and individuals with disabilities. In addition to the above required capital projects, up to 45 percent of an area's apportionment may be utilized for additional public transportation projects that:

- a. Exceed the ADA minimum requirements;
- b. Improve access to fixed-route service and decrease reliance by individuals with disabilities on ADA-complementary paratransit service; or
- c. Provide alternatives to public transportation that assist seniors and individuals with disabilities with transportation.

Such projects must be targeted toward meeting the transportation needs of seniors and individuals with disabilities, although they may be used by the general public. It is not sufficient that seniors and individuals with disabilities are included (or assumed to be included) among the people who will benefit from the project. FTA encourages projects that are open to the public as a means of avoiding unnecessary segregation of services.

**All requested operating expenses must have a functional relationship to transportation for seniors and/or individuals with disabilities.**

## **2. PROGRAM PRIORITIES**

Funding of projects through Section 5310 is guided by the priorities set in the adopted Coordinated Plan.

### **2.1 A coordinated planning process**

The goal of the FTA Section 5310 Program administered by SAMTD falls in line with federal guidelines. This goal is to improve mobility for seniors and individuals with disabilities by removing barriers to transportation services and expanding the transportation mobility options available in the Salem-Keizer UZA. A complementary state-run program, formerly called the Special Transportation Fund, is now allocated through the STIF program. This grant program also provides funding for seniors and individuals with disabilities.

Before a project can be awarded funds, the project must be certified by the SAMTD Board of Directors that it is included in a locally developed Coordinated Plan. The Coordinated Plan was significantly updated in 2024 to establish long-term goals for providing transportation services to seniors and individuals with disabilities, including the process for long-range planning and consultation with elected officials. The needs and strategies section of the document was updated using the public outreach feedback received in late 2023. The Coordinated Plan lists several strategies that articulate the regional goals and objectives of the Section 5310 Program. Table 2-1 lists eligible project strategies to meet these identified needs, as shown in the 2024 version of the Coordinated Plan.

**Table 2-1.** List of potential projects or service improvements intended to mitigate the gaps or unmet needs of seniors and individuals with disabilities in the Salem-Keizer UZA.

<b>Unmet Transportation Need</b>	<b>Strategy</b>
<p><i>Transportation service needs</i></p> <ul style="list-style-type: none"> <li>• Increased service hours and frequency</li> <li>• Expanded service extent to include more service in the early morning and later evening</li> <li>• Increased weekend and holiday service</li> <li>• Increased frequency of commuter and midday (10 a.m. – 2 p.m.) routes</li> <li>• Increased service coverage</li> <li>• Enhanced services to unserved or underserved areas</li> <li>• Expanded service to basic needs destinations and destinations essential to life such as shopping, groceries, social services, and medical facilities</li> <li>• Increased service quality</li> <li>• Increased frequency of service and reduce travel time</li> <li>• Improved reliability, schedule adherence, and on-time arrivals</li> <li>• Additional stops to decrease walking distances and increase accessibility</li> <li>• Expanded dial-a-ride (DAR) services for seniors and individuals with disabilities who have difficulty accessing fixed-route transit services</li> </ul>	<p><i>Transportation service strategies</i></p> <ul style="list-style-type: none"> <li>• Sustain current service levels, considering equity and service performance</li> <li>• As funding allows, implement the Long Range Transit Plan (LRTP) and other recent plans</li> <li>• Follow Cherriots Service Guidelines to address gaps in public transit services</li> <li>• Identify areas with the greatest need for additional or enhanced transit services and apply new funding toward these identified needs</li> <li>• Increase weekend and holiday service on Cherriots Local and Cherriots Regional fixed routes</li> <li>• Extend morning and evening hours on fixed routes during the weekdays</li> </ul>

**Table 2-1 (continued).** List of potential projects or service improvements intended to mitigate the gaps or unmet needs of seniors and individuals with disabilities in the Salem-Keizer UZA.

<b>Unmet Transportation Need</b>	<b>Strategy</b>
<p><i>Transportation service needs (continued)</i></p> <ul style="list-style-type: none"> <li>• Increased service quality</li> <li>• Increased frequency of service and reduce travel time</li> <li>• Improved reliability, schedule adherence, and on-time arrivals</li> <li>• Add additional stops to decrease walking distances and increase accessibility</li> <li>• Expanded dial-a-ride (DAR) services for seniors and individuals with disabilities who have difficulty accessing fixed-route transit services</li> <li>• Expand DAR services for basic needs such as shopping, medical, and recreational destinations</li> <li>• Improved transit service for underserved groups, such as:               <ul style="list-style-type: none"> <li>○ 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</li> <li>○ Youth, especially for grades 9 through 12</li> <li>○ People who are unable to schedule service in advance</li> <li>○ People who are unable to accommodate lengthy trip times</li> <li>○ People who attend addiction counseling/group therapy services in Polk County</li> </ul> </li> <li>• Enhanced volunteer-based carpool or vanpool programs, especially those that provide medical service</li> </ul>	<p><i>Transportation service strategies (cont.)</i></p> <ul style="list-style-type: none"> <li>• Improve frequencies where service is too infrequent</li> <li>• Increase capacity of existing volunteer carpool or vanpool programs by increasing the fleet of accessible vehicles for community-based services</li> <li>• Explore options for microtransit, circulator, feeder route, and flexible route or dial-a-ride services</li> <li>• Improve regional connections between modes and service providers, especially connections to unserved or underserved communities</li> <li>• Expand service coverage to more basic needs destinations and destinations essential to life</li> <li>• Where allowable, explore partnerships with Transportation Network Companies (TNCs) such as Uber or Lyft to provide first-mile/last-mile transportation for customers who can utilize fixed-route transit for part of their trip</li> <li>• Explore opportunities to expand Get There Oregon or develop a new platform for ride-matching for seniors and individuals with disabilities</li> </ul>

**Table 2-1 (continued).** List of potential projects or service improvements intended to mitigate the gaps or unmet needs of seniors and individuals with disabilities in the Salem-Keizer UZA.

Unmet Transportation Need	Strategy
<p><i>Infrastructure needs</i></p> <ul style="list-style-type: none"> <li>• Enhanced accessibility of stops and vehicle fleet, especially on fixed routes, to meet a range of physical needs of riders and right-sizing of fleet               <ul style="list-style-type: none"> <li>○ Improve bus stop amenities</li> <li>○ Improve accessibility at bus stops (e.g. ADA-compliant curb ramps, level sidewalks)</li> <li>○ Provide covered bus shelters, lights, and trash receptacles</li> <li>○ Enhance signage for bus stops and shelters</li> </ul> </li> <li>• Improved pedestrian accessibility               <ul style="list-style-type: none"> <li>○ Enhance crosswalks near bus stops</li> <li>○ Complete gaps in sidewalk network</li> <li>○ Locate stops where pedestrian access is available/ comfortable</li> </ul> </li> <li>• Improved bicycle accessibility</li> <li>• Consider nearby activity centers, such as senior centers, medical centers, and schools where accessibility needs may vary stop and access needs</li> <li>• Small transit centers in established communities without a transit center or major transit stop with a shelter</li> </ul>	<p><i>Infrastructure strategies</i></p> <ul style="list-style-type: none"> <li>• Review existing pedestrian plans in Marion and Polk counties for opportunities and funding sources to improve sidewalk and pedestrian infrastructure and shared use mobility options that provide first-and-last-mile connectivity to transit destinations</li> <li>• Prioritize bus stop locations needing improvements</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 and roads</li> <li>• Develop strategies (e.g., incentives, mutual planning requirements) to influence the siting of facilities that provide services to seniors and/or individuals with disabilities</li> <li>• Create a safer transit environment by following design principles that promote visibility and comfort on new or upgraded transit facilities</li> </ul>



**Table 2-1 (continued).** List of potential projects or service improvements intended to mitigate the gaps or unmet needs of seniors and individuals with disabilities in the Salem-Keizer UZA.

<b>Unmet Transportation Need</b>	<b>Strategy</b>
<p><i>Coordination and organizational needs</i></p> <ul style="list-style-type: none"> <li>• Coordinated services that cross jurisdictional and transit provider service area boundaries               <ul style="list-style-type: none"> <li>○ Reduced duplication of services</li> <li>○ Maintained and enhanced service connectivity among local operators</li> </ul> </li> <li>• Coordinated 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               <ul style="list-style-type: none"> <li>○ Salem Health, Kaiser Permanente, Legacy Silverton Medical Center, Garten Services, etc.</li> </ul> </li> </ul>	<p><i>Coordination and organizational strategies</i></p> <ul style="list-style-type: none"> <li>• Develop a calendar in line with state and federal requirements for staff to periodically review the Coordinated Plan and to bring an assessment to the STIFAC to evaluate progress and make updates as needed. At the time of this writing, the Coordinated Plan is expected to be updated every four or five years.</li> <li>• Coordinate with medical facilities, seniors and/or individuals with disabilities transportation consumers, and their representatives to optimize trip scheduling (e.g., Legacy Silverton Medical Center program, Salem Health)</li> <li>• Coordinate with public and private sector organizations to identify opportunities for joint scheduling or sharing of vehicles (e.g., senior centers)</li> <li>• 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)</li> </ul>

**Table 2-1 (continued).** List of potential projects or service improvements intended to mitigate the gaps or unmet needs of seniors and individuals with disabilities in the Salem-Keizer UZA.

<b>Unmet Transportation Need</b>	<b>Strategy</b>
<p><i>Marketing, customer service, and outreach needs</i></p> <ul style="list-style-type: none"> <li>• Increased accountability, customer service, responsiveness, and human interaction</li> <li>• Increased availability of information in Spanish and other languages commonly spoken in local communities. Where significant Limited English Proficiency (LEP) populations exist, materials could be translated into specific languages other than Spanish upon request.</li> <li>• Utilization of Service Integration Teams (SIT) to share information about existing services to regional social service providers</li> <li>• Outreach events performed at senior centers, city advisory committees, community centers, schools, and other organizations that have high concentrations of seniors and individuals with disabilities who may not know about what services are currently available to them</li> <li>• Travel training group sessions held for seniors and individuals with disabilities through local senior centers, community centers, or other organizations that have groups interested in learning about how to use transit to get to places they want to go</li> </ul>	<p><i>Marketing, customer service, and outreach strategies</i></p> <ul style="list-style-type: none"> <li>• Develop and distribute information promoting travel options, counseling services, travel training, and web application-based information systems</li> <li>• Coordinate with medical, social, senior center, employers, and other organizations to share information about local transportation options and training opportunities</li> <li>• Increase communication and marketing efforts to make members of the public and policymakers aware of transportation options</li> <li>• Encourage seniors and individuals with disabilities to use online trip planning tools</li> <li>• Explore a fare assistance program for people whose primary barrier to using public transit is financially based</li> <li>• Provide more driver training to ensure a positive, consistent customer experience by incorporating feedback from well-regarded drivers</li> </ul>

**Table 2-1 (continued).** List of potential projects or service improvements intended to mitigate the gaps or unmet needs of seniors and individuals with disabilities in the Salem-Keizer UZA.

<b>Unmet Transportation Need</b>	<b>Strategy</b>
<p><i>Marketing, customer service, and outreach needs (continued)</i></p> <ul style="list-style-type: none"> <li>• Improved access to and availability of information, education, and outreach about the range of transportation providers and services in both the urban and rural areas</li> <li>• Increased service advertising:               <ul style="list-style-type: none"> <li>○ Improved information about the availability of different transit services (e.g. Cherriots Regional and Cherriots Local) and how they work together</li> <li>○ Advertisements through traditional media such as radio, local publications, bus shelters, 211 service, kiosks, and brochures</li> <li>○ Advertisements through new media opportunities such as Instagram, Facebook, Twitter (now "X")</li> <li>○ Targeted advertising/outreach to specific groups (e.g. churches, social service agencies, senior centers, visually impaired communities), and at destinations such as hospitals</li> <li>○ Increased advertising for travel training information and services</li> </ul> </li> <li>• Increased number of volunteer drivers</li> </ul>	<p><i>Marketing, customer service, and outreach strategies (continued)</i></p> <ul style="list-style-type: none"> <li>• 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, including the electronic fare payment system</li> <li>• Enhance and develop travel training materials such as videos, educational brochures, translated materials, and provide on-location presentations by customer service representatives and travel trainers</li> <li>• Conduct outreach to increase the number and geographic area of volunteer drivers</li> <li>• Survey riders for feedback to improve drop-off and pick-up locations</li> </ul>

**Table 2-1 (continued).** List of potential projects or service improvements intended to mitigate the gaps or unmet needs of seniors and individuals with disabilities in the Salem-Keizer UZA.

Unmet Transportation Need	Strategy
<p><i>Technology needs</i></p> <ul style="list-style-type: none"> <li>• On-demand service pilots</li> <li>• Security cameras on vehicle fleets</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>• Automatic Vehicle Location (AVL) and/or GPS systems for real-time tracking on buses and other fleet vehicles</li> <li>• Text alerts on additional transit services</li> <li>• Scheduling and dispatch support to medical providers</li> <li>• Innovative opportunities to continue enhancing the electronic fare system and making it more accessible to populations that are less proficient in technology</li> </ul>	<p><i>Technology strategies</i></p> <ul style="list-style-type: none"> <li>• Develop and test new technologies 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>• Explore implementation of new technologies at bus stops such as speaking/digital schedules and electronic signs to enhance accessibility</li> <li>• Work toward 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>

**Table 2-1 (continued).** List of potential projects or service improvements intended to mitigate the gaps or unmet needs of seniors and individuals with disabilities in the Salem-Keizer UZA.

Unmet Transportation Need	Strategy
<p><i>Capital and funding needs</i></p> <ul style="list-style-type: none"> <li>• Well-maintained bus fleet</li> <li>• Funding to maintain and enhance the existing and potential expansion vehicles in the fleet and available transit service</li> <li>• Maintenance of affordability of fares for populations that need it; maintain a single fare system across Cherriots Local and Cherriots Regional services in order to make it affordable to those who use both systems</li> <li>• Maintenance of the free youth fare on all Cherriots services in order to promote travel by transit and build the next generation of public transit riders</li> </ul>	<p><i>Capital and funding strategies</i></p> <ul style="list-style-type: none"> <li>• Advocate for increased funding and seek out new and innovative funding opportunities</li> <li>• Review bus inventory against route/rider needs. Seek grants that would enable “right sizing” of vehicles, that balances ridership and capacity with maneuverability and fuel efficiency</li> <li>• Advocate for adequate capital replacements</li> <li>• Continue to develop and implement vehicle maintenance schedules</li> <li>• Review the funding application process and application materials on a biennial basis; revise to match the grant funding sources as changes are adopted by funding agencies.</li> </ul>

### **3. ROLES AND RESPONSIBILITIES**

SAMTD, as the designated recipient of 5310 funds, conducts a selection process to determine the use of the funds, and to certify that projects were derived from the Coordinated Plan. SAMTD separates the selection process for FTA-direct Section 5310 dollars with the process for selecting ODOT pass-through Section 5310 dollars, but the procedures for selecting projects for the two programs are the same. These procedures involve the State Transportation Improvement Fund Advisory Committee (STIFAC), the Board-appointed committee that acts in an advisory function to the SAMTD Board of Directors, which has the final authority for making funding determinations.

The STIFAC conducts the screening and selection process for Section 5310 grant applications as well as STIF grant applications. If selected by the SAMTD Board of Directors for a grant, the sub-recipient, as defined in Section 5 “Eligible Sub-recipients,” enters into a formal contract with SAMTD ensuring that all state and federal laws and regulations are followed.

#### **3.1 SAMTD roles and responsibilities**

The following are the administrative roles and responsibilities of SAMTD as it provides Section 5310 funds to its sub-recipients:

- Develop and revise the “Public Transit – Human Services Transportation Coordinated Plan for Marion and Polk Counties” at least every four to five years in partnership with ODOT;
- Notify eligible sub-recipients of application cycles and distribute project application materials;
- Determine sub-recipient and project eligibility with staff first pre-approving applicants based on Section 1.4 “Eligible Sub-recipients,” and pre-approving projects based on Section 1.5 “Eligible Activities,” before forwarding qualified applications to the Technical Advisory Committee for consideration;
- Maintain a list of eligible sub-recipients;

- Provide technical assistance to eligible sub-recipients;
- Work with sub-recipients to procure capital items and ensure compliance with all applicable state and federal requirements;
- Develop, execute, manage, and amend grant agreements with sub-recipients;
- Apply for federal funds on behalf of eligible sub-recipients as identified by SAMTD and manage the program's federal grants;
- Complete program grant reporting to the FTA on a quarterly and annual basis;
- Process payments, draw down federal funds, complete financial audits, and complete grant closeouts;
- Collect and maintain financial reports, operating statistics, and vehicle data from sub-recipients;
- Monitor sub-recipient compliance with federal requirements (Title VI, Section 504, ADA, etc.);
- Conduct on-site inspections of sub-recipient projects;
- Amend the SAMTD Title VI Program, Equal Employment Opportunity (EEO) Plan, Disadvantaged Business Enterprise (DBE) Goals, and other applicable documents to include the FTA-Direct Section 5310 Program;
- Review sub-recipients' Title VI, EEO, and DBE programs;
- Investigate and address Title VI, EEO, and DBE complaints;
- Monitor sub-recipients' adherence to maintenance plans and safety standards;
- Develop and revise the program's Program Management Plan (PMP);
- Develop and approve the annual Program of Projects (POP), and program the formula fund projects into the regional Transportation Improvement Program (TIP), maintained by the Mid-Willamette Valley Council of Governments (MWVCOG);

Develop and conduct the project selection process, which includes:

- Develop the application form to distribute to eligible sub-recipients;
- Release a solicitation for project applications to eligible sub-recipients;
- Develop project selection criteria;
- Receive and review project applications from sub-recipients;

- Present project funding recommendations to the STIF Advisory Committee;
- Advertise the STIFAC meetings through publication of a public notice in a local newspaper with a large circulation and via the Cherriots.org website and social media channels to provide the public and private transportation providers with notice and an opportunity to comment on projects selected for funding;
- Notify successful sub-recipients of their award amounts and reporting requirements;
- Once the funding recommendation is approved by the SAMTD Board of Directors, SAMTD staff submits the approved applications to the FTA for final approval. Once approved, SAMTD staff will draft agreements with recipients and post a copy on Cherriots.org and the FTA's Transit Award Management System (TrAMS). The Coordinated Plan is a living document and updates shall be made continuously. Coordination of projects to ensure compliance shall be an annual review and solicitation of projects to ensure at least 55 percent is used for traditional Section 5310 projects as defined in the FTA Circular 9070.1G (Section 5310 - Enhanced Mobility of Seniors and Individuals With Disabilities Program Guidance and Application Instructions); and
- Provide demographic data to sub-recipients to help them comply with Title VI requirements.

## 3.2 Sub-recipient roles and responsibilities

The following are the roles and responsibilities of sub-recipients as they receive Section 5310 funds:

- Inform SAMTD staff of their intention to apply for Section 5310 Program funds, complete and submit application(s), provide project description(s) and funding information, provide follow-up information, and participate in interviews and/or on-site visits if conducted;
- Work with SAMTD staff to procure capital items; assure the procurement regulations are met;
- Develop and maintain a Maintenance Plan to be held on file with SAMTD;
- Inspect, insure, and maintain all vehicles funded through the program;
- Complete and submit acceptance certifications to SAMTD upon vehicle delivery;
- Deliver the project as described in the grant project application, including local management and administration;



- Provide financial management of the project, including provision of matching funds and assurance that Section 5310 funds are used for the project identified in the project application;
- Submit financial reports, operating statistics, and vehicle data to SAMTD on a quarterly basis;
- Maintain a Title VI program and comply with Federal Title VI requirements;
- Submit to on-site inspections as requested by SAMTD;
- Comply with private sector participation requirements in Section 10 of this document; and
- Comply with all applicable state and federal requirements.

## **4. COORDINATION**

Coordination is an ongoing process that parallels the process for STIF allocations. It involves a public input process through the STIFAC and the development of the Transportation Improvement Program (TIP) by the MWVCOG, and eventually the Board of Directors comprised of elected officials make final funding decisions based on input from SAMTD staff, the STIF Advisory Committee, and the general public.

### **4.1 Public participation process**

Coordination with MWVCOG staff ensures that all Section 5310 projects are listed in the TIP, which lists all federally funded transportation projects in the region. For public transportation projects, the public participation process for the TIP satisfies the public participation process and timing for the POP. All projects considered for funding must be reviewed by the STIFAC, which is aware of all funding for projects serving seniors and individuals with disabilities. The STIFAC uses the Coordinated Plan as a guide for the coordination of projects. This prevents the duplication of services to any target group.

The following non-profit organizations work with SAMTD on a regular basis: United Way of the Mid-Willamette Valley, the Mid-Willamette Community Action Agency, Northwest Senior and Disability Services, Garten Services, Inc., and the tribal governments involved with the Chemawa Indian School.

In developing the Coordinated Plan, SAMTD integrated information from local and regional demographics and residential/employment growth trends, ridership and productivity of existing services, intra-county and inter-county commute data, land use patterns with data gathered from stakeholders through interviews, surveys, and focus groups. Stakeholder groups included Senior Center members and staff in three communities, senior-oriented programs in Marion and Polk counties, SAMTD staff, and the staff from human services agencies whose services to clients dovetail with transit services.

The goals and objectives align with relevant state and previous District plans to ensure that the 5310 Program Management Plan aligns with long-term public transit goals. These plans support the development of strategies to enhance public transit in Marion and Polk counties, with a focus on the needs of seniors and people with disabilities. The following sections present relevant goals, objectives, and performance measures of relevant plans and policies, including:

- Oregon Public Transportation Plan (2018)
- Salem Area Mass Transit District Coordinated Transportation Human Services Plan (Coordinated Plan, 2024)
- Salem Area Mass Transit District Long Range Transit Plan (LRTP) (2022)
- Salem Area Mass Transit District Strategic Plan (FY 2024)

The Salem Area Mass Transit District (SAMTD) Strategic Plan for Fiscal Year (FY) 2024 establishes four success outcomes:

- Community Value
- Customer Satisfaction
- Culture of Ownership
- Financial Sustainability

Subsequently, each success outcome has one to four organizational work plan tactics that are measurable items reported to the Board every quarter:

1. Community Value

- Initiate Development of a Climate Action Plan
  - Integration of Battery Electric Buses / Zero-Emission Awareness
  - Access
  - Community Value Surveys
2. Customer Satisfaction
    - Customer Satisfaction Survey
    - E-fare Implementation
    - Cherrlots Intelligent Transportation System (CITS)
    - Clean and Safe Passenger Amenities
  3. Culture of Ownership
    - Merit-based Performance Management System
    - Management and Resource Tracking Instrument (MARTI)
    - Diversity, Equity, and Inclusion (DEI)
    - Employee Engagement Survey
  4. Financial Sustainability
    - The Finance Story

## **5. PROJECT SELECTION CRITERIA AND METHOD OF DISTRIBUTING FUNDS**

Planning for Section 5310 projects is included in the Coordinated Plan, which is updated every four to five years. This planning process is conducted within the framework of the Salem Keizer Area Transportation Study's (SKATS) 2023-2050 Metropolitan Transportation Plan, the MWCOG Unified Planning Work Plan (UPWP), TIP, and the SAMTD Strategic Plan.

Annual program funding will use a competitive process as outlined below. SAMTD will solicit project applications from eligible sub-recipients based on a timeline that is established each year by SAMTD staff.

There are four major criteria used to select and distribute Section 5310 dollars:

1. An assessment of current transportation services

2. An assessment of transportation needs
3. Identification of strategies, activities, and/or projects to address the identified transportation needs (as well as ways to improve efficiencies)
4. Implementation of priorities based on funding, feasibility, time, etc.

Projects funded through the Section 5310 program are derived from The Coordinated Plan and meet the intent of the program. Proposed projects are brought forward through the SAMTD STIFAC.

Projects selected using the four criteria defined above reflect an evaluation of program needs and the potential to match the need with projected funding, the number of constituents to be served, staffing resources, and potential coordination with other community services. The STIFAC receives the applications and hears presentations given by applicants to make informed recommendations for proposed projects on an annual basis. The STIFAC makes the recommendation to the SAMTD Board of Directors, which ultimately has final authority for deciding which projects will be funded.

Applications are solicited on the Cherriots.org website, by publishing a public notice in the Statesman Journal newspaper at least 30-days before the application deadline. The public notice is also distributed by sending email solicitations to known providers, and via social media channels. The application process is used for all projects. The outline that follows provides a step-by-step process used by the SAMTD planner who coordinates the solicitation process:

- Advertisements for applications are placed on the Cherriots.org website, by publishing a public notice in the Statesman Journal newspaper, and by sending email solicitations to known providers;
- A list of every provider receiving the application solicitation is maintained;
- Should addenda be required, copies are issued to all receiving the applications
- SAMTD staff date and time stamp applications to ensure documents are received by the published closing date;
- Responses are reviewed for completeness including:
  - Required forms

- Listing of references, qualifications, other documents
- Original copy is identified as the document of record
- Agency eligibility
- Project eligibility
- Application review by STIFAC
  - Copies of applications are provided to each STIFAC member, along with evaluation sheets;
  - One evaluation meeting is conducted where applicants are requested to give a short oral presentation on their proposed project and answer any questions that STIFAC members have;
  - Evaluation sheets are scored, recorded, and tabulated for consensus;
  - References are checked to verify projects given as samples;
  - The STIFAC develops the final recommendation for a POP to go to the SAMTD Board of Directors for approval;
- The SAMTD Board of Directors vote on the final project recommendation from the STIFAC, and the approved list is funded.
- Follow-up to provider selection:
  - Notification letter is mailed to all responders indicating approved projects;
  - Response is made to protests, should any arise, along with documented findings;
  - Board action request is written for approval of contract writing;
- Contract with approved provider is developed;
  - Signed contract is mailed with request for insurance certificates;
  - Receipt of contract with all necessary attachments;
  - Notification is mailed to proceed with timeline of contract activities.

## **6. ANNUAL PROGRAM OF PROJECTS**

### **DEVELOPMENT AND APPROVAL PROCESS**

SAMTD is responsible for conducting a local public process to solicit, review, and prioritize projects for funding. The review includes evaluation of applicant eligibility, project type and justification, merit, coordination efforts, public involvement, and environmental justice. SAMTD may establish other review criteria as well, such as local priorities, project planning, efficiency, and effectiveness. The SAMTD Board of Directors' review, utilizing the STIFAC as a resource, assures that projects are derived from The Coordinated Plan.

The application process will be led by SAMTD staff. Each application cycle will have guidance, application forms, and specific tasks, deadlines, and meeting dates that will be identified in the materials that are distributed to eligible sub-recipients as appropriate.

1. SAMTD staff informs eligible sub-recipients of the upcoming application cycle. Along with a public notice published in the local newspaper (the Statesman Journal), the notice of availability is posted on the SAMTD website and through its chosen social media channels such as Facebook and X (formerly Twitter). SAMTD's non-profit organization contacts such as the United Way, Catholic Community Services, and Garten Services are also notified of the available funds when the notice is published in order to maximize feasible participation by private providers of public transportation.
2. Eligible sub-recipients notify SAMTD staff of their intention to apply.
3. Completed applications are due to SAMTD staff; staff will review applications for project eligibility, completeness, compliance with requirements, whether the project would be considered as a traditional 5310 or non-traditional 5310 project, and applicant qualifications prior to sending to the Statewide Transportation Improvement Fund Advisory Committee (STIFAC).
4. The STIFAC reviews and ranks the eligible projects to determine which projects receive funding; the committee must ensure that the minimum of 55 percent of the funding is used for traditional 5310 projects; then the committee makes a recommendation to the SAMTD Board of Directors; the STIFAC may recommend that a project receive only part of the funding requested in an application due to limited Section 5310 Program funding available. This may result in a reduced federal share for a project, or only part of the project being implemented.
5. SAMTD staff prepares a draft Program of Projects (POP) for review by the STIFAC.

The requirements for the POP include:

- The total number of sub-recipients;
- Identification of each sub-recipient, including whether they are governmental authorities, private non-profit agencies, or Indian tribal governments or tribal transit agencies;
- A description of each project;
- The total project cost and the federal share; and
- Whether each project is a capital or an operating expense; and whether or not it meets the requirements for a "traditional Section 5310 capital"

- project.
6. The SAMTD Board of Directors considers the STIFAC’s POP for Section 5310 Program funding.
  7. Upon approval, SAMTD staff notifies applicants of the Board’s approval of projects for Section 5310 Program funding.
    - a. Grants Administrator requests a STIP amendment from the Mid-Willamette Valley Council of Governments (MWVCOG), as needed
    - b. Grants Administrator submits application to FTA
    - c. FTA approves application
  8. Grants Administrator writes sub-recipient agreements and timeline, and provides technical assistance as needed for procurement of capital assets such as new vehicles.

A chronological summary of the application schedule process is shown in Table VI-1 below:

**Table VI-1.** Typical annual application process schedule

<b>Date</b>	<b>Event Description</b>
<i>Early February</i>	SAMTD issues the notice of funding availability, including posting applications on the Cherriots.org website.
<i>Early March</i>	Application deadline.
<i>Late March</i>	Applications are processed by SAMTD staff and submitted to the STIFAC.
<i>Early April</i>	The STIFAC reviews applications and makes recommendation of a POP to the SAMTD Board of Directors.
<i>Late April</i>	SAMTD Board of Directors receives recommendation from the STIFAC and makes a final ruling on funding.
<i>End of April</i>	Applications submitted in TrAMS.

## 6.1 Appeals of project selection process

Should an applicant feel that the project selection process was unfair or inappropriate, they can submit a formal appeal of the process to the Section 5310 Program Manager at the following address:

SAMTD  
c/o Section 5310 Program Manager  
555 Court Street NE, Suite 5230  
Salem, OR 97301

A review of the process will be completed within two weeks of the receipt of the appeal, and the applicant will be contacted with the results of the appeal.

## 7. ADMINISTRATION, PLANNING, AND TECHNICAL ASSISTANCE

SAMTD documents the procedures for administering the FTA-direct Section 5310 grant in this Program Management Plan. Future transportation needs will be identified through the updating process of The Coordinated Plan, which shall be updated every four to five years. As stated in FTA Circular 9070.1G, and in accordance with Section 6 above, SAMTD will:

1. Develop project selection criteria consistent with the coordinated planning process;
2. Notify eligible local entities of funding availability;
3. Solicit applications from potential sub-recipients;
4. Determine applicant and project eligibility;
5. Certify that allocations of funds to sub-recipients are made on a fair and



equitable basis;

6. Submit an annual POP and grant application to FTA;
7. Ensure sub-recipients comply with federal requirements;
8. Certify that all projects are included in the SAMTD Coordinated Public Transit-Human Services Transportation Plan developed and approved through a process that included participation by seniors, individuals with disabilities, representatives of public, private, and non-profit transportation and human service providers, and other members of the public;
9. Certify that to the maximum extent feasible, services funded under Section 5310 are coordinated with transportation services assisted by other federal departments and agencies;
10. Ensure that at least 55 percent of the area's apportionment is used for traditional Section 5310 projects carried out by the eligible sub-recipients as described Section 1.5 "Eligible Activities";
11. Ensure that a maximum of 45 percent of the area's apportionment is used for other projects carried out by the eligible sub-recipients as described in Section 1.5 "Eligible Activities"; and
12. Oversee project audit and closeout.

SAMTD has the option to reserve 10 percent of the total Section 5310 apportioned to SAMTD to cover administrative costs of the grant. This will cover SAMTD's internal costs for administering the grant. Technical assistance is provided to sub-recipients of Section 5310 grants to ensure compliance with federal and state regulations, including Disadvantaged Business Enterprise (DBE), Equal Employment Opportunity (EEO), and Title VI provisions.

## **8. TRANSFER OF FUNDS**

In accordance with FTA Circular 9070.1G, page III-6, #10a and 10b, funds apportioned to large urbanized areas may not be transferred to other FTA programs or to other areas of the state.

## **9. PRIVATE SECTOR PARTICIPATION**

In order to meet the 55 percent traditional projects goal, private non-profits must be solicited for participation in the program. The other 45 percent of the program is geared toward the for-profit private sector. Along with a public notice published in the local newspaper (the Statesman Journal), the notice of availability is posted on the SAMTD website and through its chosen social media channels such as Instagram and X, formerly known as Twitter. SAMTD's non-profit organization contacts such as the United Way, Catholic Community Services, and Garten Services are also notified of the available funds when the notice is published in order to maximize feasible participation by private providers of public transportation.

Contacts at the Salem and Keizer Chambers of Commerce also post notices of funding availability. Two other channels for outreach are the SAMTD Board of Directors, whose governor-appointed members have many contacts in local organizations, and a list of minority-based organizations such as Mano a Mano and the Micronesian Islander Community – MIC Oregon.

## **10. CIVIL RIGHTS**

SAMTD adopted its current update to its Title VI Program in June 2023, using the most recent federal guidelines. This program details how SAMTD meets federal civil rights requirements and includes the policies that prevent discrimination against populations of racial minorities, people of other national origins, and people of color. The adopted Program includes clauses that require SAMTD to monitor its sub-recipients of Section 5310 funds for Title VI compliance.

All sub-recipients must comply with Title VI regulations (as well as EEO and DBE requirements), or risk federal funding cancellation and withdrawal. SAMTD holds regular consultations with its sub-recipients and offers technical assistance for complying with these requirements. Each contract signed between SAMTD and its sub-recipients includes provisions for compliance with the Title VI, EEO, and DBE federal laws. The details of procedures and methods for monitoring the sub-recipients are as follows:

## 10.1 SAMTD responsibilities

1. Obtain a signed certification of compliance from all sub-recipients each year.
2. Include non-discrimination clauses in all grant agreements.
3. Maintain a list of all 5310 funding applications and ensure those projects serving minority populations have equal opportunity for funding.
4. Ensure SAMTD's project evaluation and selection processes are non-discriminatory.
5. Review all informal complaints received by SAMTD that may be a "civil rights" issue and provide technical assistance to agencies or individuals.
6. Refer information on active lawsuits or complaints to SAMTD's Civil Rights Officer.
7. Review Civil Rights compliance during on-site program reviews.
8. Review Title VI compliance during on-site program reviews.
9. Notify the public of SAMTD's commitment to providing non-discriminatory programs, and inform the public how to find more information and file a discrimination complaint.

## 10.2 Sub-recipient responsibilities

1. Provide annual Title VI assurances. First-time applicants, in addition to assurances, shall provide information regarding their Title VI compliance history if they have previously received funding from another federal agency.
2. Develop a Title VI complaint form and associated procedures.
3. Record and report Title VI investigations, complaints, and lawsuits. Report to SAMTD a concise description of active lawsuits or complaints alleging discrimination in service delivery in the past three years. The report must disclose the status or outcome of lawsuits or complaints,

and summarize all Civil Rights compliance review activities conducted during the three-year period.

4. Provide meaningful access to Limited English Proficiency (LEP) Persons.
5. Provide information to the public. Post information on the website, buses, brochures, etc.
6. Provide additional information upon request.
7. Prepare and submit a Title VI Program/Report to SAMTD. Submit general information to determine compliance with Title VI. Submission shall include:
  - a. A summary of public outreach and involvement activities and the steps taken to ensure minority and low-income people had meaningful access to these activities;
  - b. A copy of the agency's plan for providing language assistance for persons with LEP;
  - c. A copy of the agency's procedures for tracking and investigating Title VI complaints;
  - d. A list of Title VI investigations, complaints, or lawsuits filed with the agency since the last submission. The list should include only those that pertain to public transportation; and
  - e. A copy of the agency's notice to the public that it complies with Title VI and instructions to the public on how to file a complaint.
8. Integrate environmental justice analysis.
9. Seek out and consider viewpoints of minority, low-income, and LEP populations.

Civil Rights assurances are submitted to FTA with every application of Section 5310 funds. Civil Rights assurances extend to the sub-recipient's entire facility and services. Sub-recipients are required to keep a record of all complaints and are required to report to SAMTD any formal (written) complaints of discrimination in the provision of transportation-related services or benefits.

## 10.3 Environmental justice

Agencies receiving federal grant funds are required to assure non-discrimination under Title VI of the Civil Rights Act and other related laws. Environmental justice specifically addresses minority and low-income populations: a 1994 Presidential Executive Order directed every federal agency to make environmental justice part of its mission by identifying and addressing the effects of all programs, policies, and activities on “minority populations and low-income populations.” Sub-recipients support Title VI and environmental justice when they:

1. Assure new investments and changes in transit facilities, services, maintenance, and vehicle replacement deliver equitable levels of service and benefits to minority and low-income populations.
2. Avoid, minimize, or mitigate disproportionately high and adverse effects on minority and low-income populations.
3. Assure that public involvement activities identify and involve minority and low-income populations when making transportation decisions.
4. Engage in planning related to development of transit services and capital purchases, they are expected to include consideration of “environmental justice.”

### ***SAMTD responsibilities***

Provide technical assistance to help sub-recipients with outreach to minority and low-income populations.

### ***Sub-recipient responsibilities***

Consider transportation needs of minority and low-income populations, as well as others, in all planning processes, including mobility issues, access to jobs and services, level of service and service equity.

## 10.4 Disadvantaged Business Enterprise program

As a recipient of FTA funds, SAMTD is required to implement a program that provides the maximum opportunity for Disadvantaged Business Enterprises

(DBEs) to compete for contracts financed by federal funds. It is the policy and intent of SAMTD to practice nondiscrimination and to create a level playing field on which DBEs can compete fairly for contracts. The DBE program affects all of SAMTD federally funded projects. Regulations are found at 49 CFR, Parts 23 and 26.

### ***SAMTD roles and responsibilities***

1. Assure that provisions of the DBE Program are adhered to by SAMTD, FTA grant sub-recipients and contractors; and initiate and maintain efforts to increase DBE Program participation by disadvantaged businesses;
2. Include DBE requirements in all grant agreements;
3. Assist sub-recipients to obtain information on DBE businesses in their geographic areas; and
4. Require sub-recipients to submit semiannual DBE reports on capital, materials and supplies, and professional services expenses and quarterly ARRA DBE reports on the same.

## **10.5 Equal Employment Opportunity**

SAMTD is responsible both for its own compliance and for ensuring that local sub-recipients are in compliance with the Equal Employment Opportunity Act (EEO). The threshold for compliance is receipt in the previous fiscal year of \$1 million or more in FTA assistance, and 50 or more mass transit-related employees. SAMTD has an EEO plan covering its employees.

In addition, SAMTD may require documentation from any sub-recipient as it deems necessary to assure that there is no discrimination on the basis of race, color, creed, national origin, sex, age, or disability. Reference is found at FTA C 9070.1.G. SAMTD will post EEO information in a place readily accessible by employees, will include an EEO statement in all job advertisements, and will review EEO practices by sub-recipients during on-site reviews.

## **11. SECTION 504 AND ADA REPORTING**

Section 504 of the Rehabilitation Act of 1973 preceded the Americans with Disabilities Act (ADA). Section 504 prohibits discrimination on the basis of handicap by recipients of federal financial assistance. US DOT's Section 504 regulations remain in effect. The USDOT issued regulations to implement the ADA effective January 26, 1992.

The ADA is a Civil Rights law enacted by the U.S. Congress in 1990. The FTA enacted regulations in support of the ADA that define the delivery of transportation services. The regulations require specific actions on the part of transit providers. The FTA regulations are found in the U.S. Department of Transportation 49 CFR Parts 27, 37 and 38: Transportation for Individuals with Disabilities; Final Rule, Friday September 6, 1991. These regulations apply to all providers of public or private transportation services whether or not they receive state or federal funding assistance. These rules are available on the Federal Transit Administration's website: <https://www.transit.dot.gov/regulations-and-guidance/civil-rights-ada/civil-rightsada>

As a condition for receiving grant funding, sub-recipients must demonstrate compliance with the ADA and the FTA's implementing regulations. Agencies will demonstrate compliance through their day-to-day operating procedures, their planning and management of transit services, public involvement and information, vehicle procurement, and other activities.

Each transit agency will have written policies and procedures designed to meet the requirements. For example, the vehicle maintenance policy will include maintenance of the ADA-accessible features (the lift, etc.); the employee-training plan will include ADA topics. If the agency contracts out any or all of the service, the agency must be knowledgeable about how the contractor maintains compliance. ADA compliance is not a one-time effort and compliance must be consistently maintained by the agency over time. New employees or changing services are not an excuse for lack of compliance.

SAMTD staff will routinely evaluate each sub-recipient program for compliance to the ADA. Oversight will include site reviews, desk audits, review of policies and procedures, information from substantive complaints, and other means. SAMTD will also provide technical assistance upon request.

## 11.1 Summary of ADA requirements

The regulation is divided into compliance areas primarily associated with the following terms: public, private, fixed-route, and demand-responsive. There are other related terms. Review the definitions at 49 CFR Part 37 subpart A §37.3.

1. Public means any state or local government, and any department, agency, special purpose district, or other instrumentality of one or more state or local governments;
2. Private means any entity other than a public entity;
3. Fixed-route system means a system of transporting individuals on which a vehicle is operated along a prescribed route according to a fixed schedule;
4. Demand-responsive system means a system of transporting individuals that is not a fixed route.

Compliance to the ADA requires that sub-recipients comply with “stand-in-the-shoes” relationships. Generally, stand-in-the-shoes means that the sub-recipient must follow the same regulations as the contracting agency. For example, if a private entity is operating under contract to a public entity, then a stand-in-the-shoes relationship exists and the contracted service must conform to those required of a public entity.

There are instances where a public entity receives funds on behalf of a private non-profit entity. When the public entity on its own would not operate the transit service, and the service design, implementation, and management is entirely the responsibility of the other entity, then the relationship between the two is defined as “pass-through” and the stand-in-the shoes definition does not apply. SAMTD staff must be knowledgeable and in agreement with how roles and responsibilities are defined.



## **12. PROGRAM MEASURES**

SAMTD requires its sub-recipients to collect and report data described in Chapters II and VI of FTA Circular C\_9070.1G. Reports are submitted quarterly with their claims for reimbursement and staff provides copies at the STIFAC meetings. If any questions arise, they can be handled promptly and with the least amount of disturbance to the services provided. SAMTD staff reports sub-recipients' data such as ridership and mileage to the FTA on a quarterly basis in accordance to the FTA's reporting requirements. Typically, sub-recipient ridership and mileage data is reported by SAMTD staff to the National Transit Database (NTD) every quarter.

### **12.1 Quarterly reports**

Quarterly reports are due to SAMTD 10 business days following the end of each quarterly period: Jan. 1 through March 31, April 1 through June 30, July 1 through Sept. 30, and Oct. 1 through Dec. 31. Data requested could include the following items, but would be listed on the report form. These reports must be submitted to SAMTD on a quarterly basis for each vehicle, transportation program, or other service funded through the Salem-Keizer Urbanized Area's Section 5310 Program:

- A narrative describing accomplishments and/or problems and changes to milestones and budgets;
- A copy of all recorded Civil Rights or Title VI complaints;
- The actual or estimated number of one-way unlinked passenger trips (if applicable), and the categorical purpose of each trip (if known, optional);
- The actual or estimated statistics related to delivering mobility management, local bus service orientation, client eligibility, or similar services; such as contacts through call centers, website visits, and training sessions;
- Physical improvements completed (such as sidewalks, transportation facilities, or technology);
- Quarterly revenues and sources of revenue for the project;
- Quarterly capital and operating costs (separated);
- Quarterly actual or estimated vehicle revenue miles (required) and hours (if known);
- Fleet summary including year, mileage, make/model, and relevant features; and
- Inventory of related facilities.

## 12.2 Annual reports

SAMTD will submit required annual Section 5310 reports to the FTA by Oct. 31 of each year, covering a 12-month period ending on Sept. 30. SAMTD will be responsible for consolidating this data from monthly reports and may request additional information from sub-recipients.

## 12.3 National Transit Database (NTD) reporting

Sub-recipients must provide SAMTD with information necessary for SAMTD to file annual NTD reports, if and when applicable. The necessary information, which commonly includes vehicle miles and hours, passenger trips, and financial information, will vary depending on the project and sub-recipients must coordinate with SAMTD to determine what is necessary. NTD information is due to SAMTD by March 15 annually.

SAMTD will use these reports to monitor sub-recipient fiscal and operational management and to satisfy federal reporting requirements. SAMTD will schedule on-site visits with sub-recipients on an annual cycle to review operations and maintenance records. In addition, to improve sub-recipient monitoring procedures, SAMTD staff may request and review supporting documentation, including local match documentation, for one sub-recipient's reimbursement request per quarter. Selection of the reimbursement request will be based on either a risk assessment or random selection.

## 12.4 Performance measures

Consistent with federal guidelines and as incorporated in the sub-recipient agreement, sub-recipients will be asked to show (as applicable) all increased activity due to the grant funded project, such as:

- Actual annual number of rides (as measured by one-way trips) as a result of the implementation of 5310 program; and
- Annual increases or enhancements related to geographic coverage, service quality and/or service times that impact the availability of transportation services for individuals with disabilities.

The sub-recipients will also work jointly with SAMTD to establish other performance indicators that are more specific to their projects to measure

relevant outputs, service levels, and outcomes. Sub-recipients will be required to report these performance measures on a quarterly basis as required by SAMTD and the FTA.

## **13. PROGRAM MANAGEMENT**

SAMTD complies with the Federal Office of Management of Budget (OMB) regulations for the management and oversight of federal grant funds. These requirements are defined by the various OMB circulars. The requirements for the FTA further define the requirements as defined by 49 USC 53, and are detailed by the program circulars. A complete list of program references and requirements is found in each of the FTA circulars. Relevant references include:

- 2 CFR 200
- 49 USC Chapter 53: <https://www.transit.dot.gov/regulations-and-guidance/legislation/chapter-53-amended-iija>
- FTA grant circulars: <https://www.transit.dot.gov/regulations-and-programs/fta-circulars/circulars>
- FTA circular 5010.1D (grant management): <https://www.transit.dot.gov/regulations-and-guidance/fta-circulars/grant-management-requirements>
- FTA C 4220.1F (procurement): <https://www.transit.dot.gov/regulations-and-guidance/fta-circulars/third-party-contracting-guidance>

Program management responsibilities, processes, and procedures, including procurement, financial management, property management, vehicle use, maintenance and disposition, accounting systems, audit, and closeout are documented in SAMTD finance policies and administrative manuals.

Furthermore, SAMTD follows and complies with the ODOT State Management Plan on all of the aforementioned topics. Procedures for management of financial reviews and project monitoring can also be found in the SAMTD finance policies and administrative manuals.

### **13.1 Management of sub-recipients**

The activities described below are part of the oversight and project management activities necessary to ensure that projects funded with 5310

funds are implemented in accordance to FTA 5310 Program guidelines and funding agreements. SAMTD responsibilities are outlined below:

### ***13.1.1 Monitoring and reporting***

- Monitor expenses and reimbursements to sub-recipients to ensure compliance with the federal grant award and the sub-recipient agreement;
- Work with the SAMTD Finance Division to include project-related information in SAMTD's financial system, such as project grant number, amount, and funding sources. This information is needed for accounting and monitoring of project funding and expenses.
- Review sub-recipient invoices for accuracy, ensure that the required documentation is on file and payments are made as approved;

### ***13.1.2 Procurements including debarment and suspension***

- Compile and distribute FTA procurement guidelines to all sub-recipients;
- Work with all sub-recipients to analyze, evaluate, and answer any particular procurement questions they may have relevant to their project(s);

### ***13.1.3 Financial management including FTA electronic grant management system***

- Prepare quarterly status progress reports and financial reports and report to the FTA's Transit Award Management System (TrAMS);
- Analyze monthly or quarterly project expenses and reimbursements from the FTA and reconcile with the FTA's TrAMS system for accuracy;

### ***13.1.4 Property management and vehicle use***

- Monitor, through yearly site visits, project implementation activities and ensure compliance with federal and contractual requirements;
- Analyze project activities and determine if any changes to the budget, scope, or schedule are required;

### ***13.1.5 Agreements, accounting system, closeout, and audits***

- Accordingly, initiate and prepare any needed grant and sub-recipient agreement amendments prior to requesting FTA's approval to grant revisions;
- Prepare and file grant budget revisions;
- Evaluate, prepare, and file grant and sub-recipient agreement closeout documents; and
- Work with sub-recipients to set performance measures throughout the life of the project to track its effectiveness and progress, as described in the Performance Measures section below and in the sub-recipient agreement.

As part of the oversight and project management activities, each project will be assigned an agreement number that will be linked to the FTA grant funding the project.

## **14. OTHER PROVISIONS**

SAMTD complies with other federal requirements such as environmental protection, Buy America provisions, pre-award and post-delivery reviews, restrictions on lobbying, prohibition of exclusive school bus transportation, and drug and alcohol testing, including the state's procedures for monitoring compliance by sub-recipients. Moreover, sub-recipients of Section 5310 funds will be monitored by SAMTD staff for compliance in all of the above-mentioned areas. The following describes SAMTD's and sub-recipients' responsibilities for complying with each provision:

### **14.1 Environmental protection**

The FTA's environmental protection process is based on compliance with the National Environmental Policy Act (NEPA) and rules adopted by the FTA to comply with NEPA in transportation-related projects. The FTA's regulation requires different levels of analysis and documentation for the various types of funding.

Most projects funded with federal funding are excluded from FTA environmental regulations because they fall into the "categorical exclusion" definition. The FTA

classifies two groups of projects which are “categorically excluded”:

1. The first are activities and projects that have very limited or no environmental effects, such as planning, design, administration and operation of transit programs, and vehicle purchases. For these activities, no environmental documentation is required and sub-recipients do not have to fill out a Documented Categorical Worksheet (DCE) form.
2. The second group includes construction projects with potential for environmental impacts: passenger shelters, bus yard, new construction or expansion of transit service facilities, offices, and parking facilities.
3. The FTA determines whether projects meet the requirements for a categorical exclusion.

### ***SAMTD responsibilities***

1. Review projects to determine those that must have DCE approval, ensure the required documents are provided, and submit the DCE packet to the FTA on behalf of the sub-recipient;
2. Provide technical assistance as needed to help sub-recipients prepare the required DCE information for the FTA; and
3. Assure a DCE approval for a project has been obtained from the FTA prior to finalizing a grant agreement.

### ***Sub-recipient responsibilities for categorical exclusions***

When a sub-recipient’s project requires FTA approval, in category ‘b’ above, these are the steps required to obtain a DCE for the project:

1. Review the “ODOT Public Transportation Shelters and Facilities Projects: Required Documentation for Federally Funded Facilities Grants (Structures)” found at:  
<https://www.oregon.gov/ODOT/RPTD/RPTD%20Document%20Library/shelter-facility-projects.pdf>
2. Fill out a Documented Categorical Exclusion form. Access the DCE worksheet from FTA Region 10’s website at:

<https://www.transit.dot.gov/regulations-and-programs/environmental-programs/preparing-environmental-documents>

and submit the form with appropriate attachments to SAMTD for processing; and

3. Do not start work on a construction project until approval of the DCE for the project has been obtained from the FTA. Ensure a copy is forwarded to SAMTD, and that the signed grant agreement with SAMTD has been received.

## **14.2 Buy America provisions, pre-award/post-delivery certifications, and new model bus testing**

Buy America provisions are federal “domestic content” regulations. Buy America affects vehicle and equipment purchases and construction contracts valued at \$100,000 or more. It provides, with exceptions, that federal funds may not be obligated for transportation projects unless the steel and manufactured products used in them are produced in the United States. The FTA makes exceptions to the Buy America requirement in four situations (see references: 49 CFR Part 661; 49 CFR Part 663).

The FTA reviews requests for waiver of the Buy America requirements on a case-by-case basis. If a waiver is required, the appropriate time for a sub-recipient to seek FTA approval is after bids have been accepted, but before the bid has been awarded. SAMTD will receive requests for Buy America waivers and forward them to the FTA.

Requirements in effect as of October 24, 1991, assure that all vehicles meet the Buy America requirements, Federal Motor Vehicle Safety Standards (FMVSS) and the sub-recipient's specifications.

### ***Pre-award and post-delivery certifications***

Procurements for vehicles must be in accordance with “Pre-Award and Post-Delivery Audits of Rolling Stock Purchases” (49 CFR Part 633; Federal Register March 31, 1992). The rule requires that any sub-recipient who purchases rolling stock certify to the FTA that it has conducted a pre-award and post-delivery audit to assure compliance with its bid

specifications, Buy America requirements, and Federal Motor Vehicle Safety Standards. Visual inspection and road testing are required when purchasing unmodified vans, cars, or 20 or fewer buses. Resident inspection is required when purchasing more than 20 buses or modified vans from a single manufacturer.

### ***14.2.1 New model bus testing***

New bus models must be tested at the FTA-sponsored test facility in Altoona, PA, before FTA funds can be expended to purchase them. The FTA rule exempts certain vehicles from testing (usually sedans and vans). The primary purpose of the testing program is to determine the strengths and weaknesses inherent in the particular model for typical operating conditions. Ideally, sub-recipients use the bus-testing report as one of the criteria used to select the vehicle for purchase.

Sub-recipients purchasing equipment with federal funds are currently required to receive the Altoona/STURAA bus test report for each vehicle model purchased and include it in procurement files when the test is required. The report should be provided by the vendor prior to sub-recipients signing off on post-delivery certification forms and acceptance of the vehicle(s) from the vendor.

### ***SAMTD responsibilities***

1. Include Buy America, pre-award and post-delivery certifications, and New Model Testing requirements in applicable grant agreements;
2. Review requests for waivers to Buy America requirements and forward them to the FTA;
3. Review agency procedures regarding Buy America, pre-and post-delivery certifications, and bus testing requirements during on-site program reviews; and
4. Review and approve all documentation and certifications provided by the sub- recipients prior to making reimbursements on grant agreements.

### ***Sub-recipient responsibilities***

1. Review the manufacturer's Buy America certification and supporting



documentation before a contract is awarded to purchase vehicles (pre-award audit). The documentation review should include vehicle sub-components (place of origin, cost, and place of final assembly). Sub-recipients must determine to their own satisfaction that the manufacturer can meet the Buy America requirements.

- a. Perform a post-delivery audit after vehicles have been delivered. This post-delivery audit assures that the manufacturer complied with Buy America, the Federal Motor Vehicle Safety Standards, and the sub-recipient's specifications. Sub-recipients must complete the post-delivery audits before they accept the vehicles and pay the vendor.
- b. Submit all documentation and certifications to SAMTD. Documentation must be received by SAMTD prior to final payment to the sub-recipient.
- c. Contact SAMTD for technical assistance if needed.

### **14.3 Lobbying**

Recipients and sub-recipients of federal grants from any source exceeding \$100,000 annually must certify that they have not and will not use federally appropriated funds for lobbying. State agencies administering federal programs certify to the FTA; sub-recipients certify to the state. State agencies and sub-recipients must impose lobbying restrictions on their third-party contractors and must obtain certifications. The regulations are found in 31 U.S.C. 1352 and 49 CFR Part 20.

Contracts, grants, and cooperative agreements are actions covered by the restrictions on lobbying. For example, activities such as submitting grant applications, status inquiries, and professional and technical services are not lobbying and do not need to be disclosed. Efforts to influence federal officials about specific grants and contracts or to ask congressional representatives for support of a particular application must be disclosed. Lobbying restrictions do not apply to activities that might influence policy issues.

#### ***SAMTD responsibilities***

1. Assure that sub-recipients have signed current year annual

- certification and assurances and have documentation on file pertaining to lobbying activities as required by 49 CFR Part 20;
2. For each quarter that SAMTD conducts a lobbying activity, complete Standard Form-LLL found at:  
<https://www.gsa.gov/reference/forms/disclosure-of-lobbying-activities> -- (Oregon state law prohibits use of state funds for lobbying. SAMTD does not participate in lobbying activity. SAMTD would submit Standard Form-LLL if for some reason this activity became part of approved work.);
  3. Obtain Standard Form-LLL from any sub-recipient and/or its subcontractor(s) who used non-federal funds to support lobbying;
  4. Send forms within 30 days of the calendar quarter in which the activities were conducted to ODOT Governmental Affairs office, who prepares the quarterly reports to the FTA; and
  5. Assure ODOT Governmental Affairs submits Standard Form-LLL to the FTA, as required.

### ***Sub-recipient responsibilities***

1. Sign annual certification of compliance pertaining to lobbying activities;
2. Where third party contractors are involved, sub-recipients must obtain a signed certification of compliance from the contractor;
3. For each calendar quarter that non-federal funds have been used to support lobbying activities in connection with a grant from SAMTD, and the sub-recipient receives federal grants exceeding \$100,000, fill out a Standard Form-LLL and submit the form within 30 days of the end of the quarter to SAMTD; and
4. If contractors received more than \$100,000 in federal funds and used non-federal funds to support lobbying, sub-recipients must obtain the completed Standard Form-LLL from the contractor and submit it to SAMTD within 30 days of the quarter in which the lobbying activity was conducted.

## **14.4 Prohibition of exclusive school transportation**

Section 5310 sub-recipients are prohibited from providing exclusive school bus

service unless the service qualifies and is approved by the FTA Administrator under an allowable exemption. Federally funded equipment or facilities may never be used to provide exclusive school bus service. Head Start transportation is considered human service transportation and not school bus service. Regulations are found in 49 CFR Part 605; 49 USC 5323 (f).

Sub-recipients are encouraged to identify ways to coordinate with schools. Sub-recipients may carry children to school as part of a public transportation program, including services provided before and after school, if provided as part of regularly scheduled service open to the general public and when the service is identified in the published schedule. Such services are commonly called "Tripper Services."

SAMTD does not allow subscription programs for carrying school children on general public systems, if by doing so the general public is excluded.

### ***SAMTD responsibilities***

1. Obtain certifications of compliance from all sub-recipients;
2. Review service descriptions in applications for funding;
3. Review service delivery during on-site reviews to assess compliance; and
4. Provide technical assistance as needed to sub-recipients.

### ***Sub-recipient responsibilities***

1. Sign a certification of compliance pertaining to School Bus regulations;
2. Report on "tripper services" as requested by SAMTD staff;
3. Redesign service if required to meet the definition of "tripper service;" and
4. Read and understand the School Bus regulations if exploring opportunities to share vehicles and resources in local communities.

## **14.5 Drug and alcohol testing regulations**

In accordance to FTA Circular C\_9070.1G, sub-recipients who receive only

Section 5310 program assistance are not subject to FTA's drug and alcohol testing rules, but must comply with the Federal Motor Carrier Safety Administration (FMCSA) rule for all employees who hold commercial driver's licenses (49 CFR part 382). Section 5310 recipients and sub-recipients that also receive funding under one of the covered FTA programs (Section 5307, 5309, or 5311) should include any employees funded under Section 5310 projects in their testing program.

"Prevention of Alcohol Misuse and Prohibited Drug Use in Transit Operations," 49 CFR Part 655, revised by the FTA August, 2002, implement the omnibus USDOT drug and alcohol testing act. This part and 49 CFR Part 40, "Procedures for Transportation Workplace Drug and Alcohol Testing Programs" describes policy development and testing procedures required of any agency in receipt of FTA funds.

Sub-recipients affected by this requirement are expected to establish and manage an ongoing drug and alcohol testing program in compliance with the regulations. They must submit a current drug and alcohol policy and any changes or updates to the policy. They must also submit Management Information System (MIS) forms annually to FTA.

### ***SAMTD responsibilities***

1. Conduct review of program policies and procedures periodically, including during site reviews;
2. Provide regular drug and alcohol testing training for sub-recipients and others who have a role in implementing the program; and
3. Provide MIS reporting information to sub-recipients as necessary; assure sub-recipients submit annual MIS reporting data as required.

### ***Sub-recipient responsibilities***

1. Develop an anti-drug use and alcohol abuse policy statement and program in accordance with FTA regulations, "Prevention of Alcohol Misuse and Prohibited Drug Use in Transit Operations," 49 CFR Part 655, and require sub-recipients to develop a program;
2. Assure that agreements include the requirement as appropriate to the purpose of the work;

3. Sign a certification of compliance to drug and alcohol programs, "Prevention of Alcohol Misuse and Prohibited Drug Use in Transit Operations," 49 CFR Part 655, and testing for the year of funding;
4. Send policy to SAMTD upon request; and
5. Submit MIS data for the previous year (Jan. 1 to Dec. 31) by the deadline specified by SAMTD each year. This is typically at the end of February.

## **APPENDICES**

<b>Appendix A:</b> Sample Public Notice .....	A-2
<b>Appendix B:</b> Sample Web Article .....	A-3
<b>Appendix C:</b> Sample Grant Application: 5310 (FTA) .....	A-5
<b>Appendix D:</b> Sample Application Instructions: 510 (FTA) .....	A-16
<b>Appendix E:</b> Eligible Activities Including Those That Meet the 55 Percent Requirement .....	A-22
<b>Appendix F:</b> SAMTD Board of Directors' Guiding Principles .....	A-27

## Appendix A: Sample Public Notice

### **[SAMPLE] PUBLIC NOTICE**

#### FUNDS AVAILABLE FOR TRANSPORTATION PROJECTS SERVING SENIORS AND INDIVIDUALS WITH DISABILITIES

The Federal Transit Administration will be announcing the availability of federal fiscal year 2018 Section 5310 Formula funds (estimated at \$232,898) this year. 5310 funds can be used for public transportation projects serving seniors and individuals with disabilities (Section 5310) within the Salem-Keizer urban growth boundary. Matching local funds are required for this grant. The match ratio is dependent on the type of project proposed.

Salem Area Mass Transit District (SAMTD) is a designated recipient of federal Section 5310 funds for the Salem-Keizer urban area, and is responsible for soliciting for projects on an annual basis. During a public meeting, the Cherriots Statewide Transportation Improvement Fund Advisory Committee (STIFAC) will review and rank applications for 5310 grant funds, and make a project priority ranking recommendation to the SAMTD Board. There will be time for public testimony at the STIFAC meeting. Full details of the process including applications, instructions, and dates/times of the public meeting will be available at [cherriots.org/grants](http://cherriots.org/grants) beginning January 23, 2018.

Grant awards for these projects are eligible for reimbursement through June 30, 2019. One eligibility requirement is that projects must be listed in the SAMTD "Coordinated Public Transit – Human Services Transportation Plan" dated August, 2016. Please refer to the corresponding grant application instructions for all of the eligibility requirements for organizations and projects.

A grant training session will be held to assist in the application process on Monday, February 5, 2018, 3:00-4:30pm at the SAMTD Administration Office, 555 Court St NE, Suite 5230, Salem, OR 97301. New applicants are encouraged to attend.

Any organization interested in submitting a proposal should contact Shofi Ull Azum, SAMTD, 555 Court St NE, Suite 5230, Salem, OR 97301, phone 503-588-2424, email [shofi.azum@cherriots.org](mailto:shofi.azum@cherriots.org) for details. Applications must be received by noon, March 19, 2018 to be considered.

Si desea una copia de este aviso público en español, por favor visite el sitio web a partir del 23 de enero 2018 (<http://cherriots.org/grants>) o por teléfono: 503-588-2424.

## Appendix B: Sample Web Article

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

SAMTD is now accepting applications for **transportation projects that are open to the public, and serve older adults and people with disabilities** within the Salem-Keizer urban growth boundary. Funding comes from the federal Section 5310 grant program. SAMTD is a designated recipient of these funds and is also the agency which distributes the funds.

Eligible applicants include:

- Private non-profits with managerial and financial capabilities to provide transportation services
- A state, county, tribal, or local government agency that:
  - Is approved by the State of Oregon to coordinate services for seniors and individuals with disabilities; or
  - Certifies that there are no non-profit organizations readily available in the area to provide the service (C\_9070.1G, p. II-1 & II-2).

Eligible projects include:

- Capital expenses for transportation projects that are planned, designed, and carried out to meet the special needs of seniors and individuals with disabilities
- Projects that will improve mobility for seniors and people with disabilities, including:
  - Rides for wellness and access to travel information
  - Capital purchases, such as vehicles, passenger shelters and equipment
  - Operational and administrative costs
  - Vehicle and facility preventative maintenance
  - Mobility management
  - Travel information
  - Planning
- New systems for improving access to transportation (for example, travel training, marketing, centralized call centers)
- All projects must be listed in the Coordinated Public Transit – Human Services Transportation Plan (“The Coordinated Plan”) dated August, 2016.



#### Project Selection Criteria:

- Priority is given to projects that match the goals and objectives listed in The Coordinated Plan.
- Projects must be cost effective and coordinate services between transportation providers to avoid providing duplicate service.
- Each project submitted to SAMTD will be reviewed for value to the Salem-Keizer urbanized area.

#### Further Details:

Public testimony about projects will be accepted at the SAMTD STIF Advisory Committee meetings. Applicants can contact Shofi Ull Azum, Chief Planning and Development Officer, at 503-588-2424 or [shofi.azum@cherriots.org](mailto:shofi.azum@cherriots.org) for application assistance.

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

A grant training session will be held to assist in the application process on February 6, 2018, 3:00 to 4:30 p.m. at the SAMTD Administration Office, 555 Court St NE, Suite 5230, Salem, OR 97301. New applicants are encouraged to attend.

The application deadline is noon, Monday, March 19, 2018. Applications will be reviewed and ranked by the SAMTD Technical Advisory Committee on Tuesday, April 3, 2018. This meeting is open to the public and will be held at 555 Court St NE, Suite 5230, Mill Creek Conference Room, Salem OR 97301. This committee will provide final recommendations to the SAMTD Board of Directors. The final decision will be made at the Thursday, April 26, 2018 board meeting.

Funding for these projects comes from the federal Section 5310 grant program.

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

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

**2018 Section 5310(FTA)  
Grant Application  
for Projects Located Within the  
Salem-Keizer Urban Growth Boundary**



## INTRODUCTION

- Read the *2018 Section 5310(FTA) Grant Application Instructions* prior to completing this application.
- Each project submitted for funding consideration must have its own application.
- Selection criteria are detailed in the *Application Instructions*.
- This form must be filled out using Microsoft Word and submitted as a Word or Adobe .pdf document. Paper applications will NOT be accepted.
- Signature pages should be scanned and attached as separate pages to each application.

### Submittal Checklist

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

- ✓ Application is complete, signed, and dated

#### ***Submit***

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

### A. ORGANIZATION INFORMATION

**Name of Organization:**

**Contact Person:**

**Address:**

**Telephone:**

**Email:**

**Type of Organization (check one)**

Private non-profit	<input type="checkbox"/>
State, county, tribal, or local government agency	<input type="checkbox"/>

**Area of service (check one)**

Inside the Salem-Keizer Urban Growth Boundary (UGB)	<input type="checkbox"/>
Outside the Salem-Keizer UGB	<input type="checkbox"/>
Both inside and outside the Salem-Keizer UGB	<input type="checkbox"/>

**Organization Days and Hours of Operation**

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

**Total transportation program costs by year**

FFY17 (historical data, if applicable)	FFY18 (projected, if applicable)	FFY19
\$	\$	\$

**B. PROJECT INFORMATION**

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

--

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

North boundary	
West boundary	
South boundary	
East boundary	
Other general geographic area (i.e., within the Salem-Keizer UGB)	

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

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

\$
----

**Start date**

--

**Funding request type (check one)**

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

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

*You are strongly encouraged to request the full amount of funding that is needed for each project, including funding for new projects; however, funding is limited. Describe the scalability of your 5310(FTA) funding request, how you scaled down your request and what aspects of the program would not be funded under this funding scenario below. Then enter your scaled down request amounts.*

Scalability Description:

	FFY19
Scaled request:	\$

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

Estimated Additional Project Resources	
Source of Funds	Dollar Amount
2018 Section 5310(FTA) Grant Request ( <i>Important!</i> )	\$
Local Resources	\$
Federal Resources	\$
Other (provide description):	\$
Project Grand Total	\$

**Coordinated Plan**

Is project derived from the SAMTD *Coordinated Public Transit – Human Services Transportation Plan* dated August, 2016?  Yes  No

If yes, what page?

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

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

**1. Project Description**

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

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

**b.) Will you coordinate between providers to avoid duplication?**

*Describe what level of coordination between partners is done and how duplication is avoided, limit 200 words*

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

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

**d.) Project Quality**

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

**e.) Expected Outcomes**

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



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

	<b>Step Description</b>	<b>Completion Date</b>
<b>1</b>		
<b>2</b>		
<b>3</b>		
<b>4</b>		
<b>5</b>		
<b>6</b>		

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

- Yes (continue to #4)     No (continue to Section C)

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

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

**\*Vehicle Category Descriptions:**

<https://www.oregon.gov/odot/RPTD/RPTD%20Document%20Library/Vehicle-Useful-Life-Benchmarks.pdf>

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

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

### C. ORGANIZATIONAL CERTIFICATION

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

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

---

Signature of Authorized  
Organization Officer

Title

Date

## Private Nonprofit Agency - Corporation Status Inquiry and Certification

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

To obtain Corporate Records Information over the Internet, go to:

<http://sos.oregon.gov/business/Pages/find.aspx> Enter the name of your agency or organization. If its status is active, print the page and submit it as proof.

### Private Non-profits

Legal Name of Non-profit Applicant:

State of Oregon Articles of Incorporation Number:

Date of Incorporation:

### Certifying Representative

Name (print):	
Title (print):	
Signature:	Date

**Appendix D: Sample Application Instructions:  
5310(FTA)**

# **2018 SECTION 5310 (FTA) GRANT APPLICATION INSTRUCTIONS**

***Section 5310(FTA) Grant Program for Projects Located Within the  
Salem-Keizer Urban Growth Boundary: "Enhanced Mobility of  
Seniors and Individuals with Disabilities"***



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

### 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.

SAMTD is the designated recipient for the Salem-Keizer urbanized area and will receive \$232,898 (estimated) in Section FFY2019 5310 funds for projects to be funded beginning July 1, 2018. These funds may only be used for projects within the Salem-Keizer Urban Growth Boundary (UGB).

This program provides funds to:

- (1) Serve the special needs of populations who do not have access to a personal vehicle beyond traditional public transportation service, where public transportation is insufficient, inappropriate, or unavailable;
- (2) Projects that exceed the requirements of the Americans with Disabilities Act (ADA);
- (3) Projects that improve access to fixed route service and decrease reliance on complementary paratransit (Cherriots LIFT); and
- (4) Projects that are alternatives to public transportation.

A discretionary selection process will be followed as outlined in the SAMTD *Program Management Plan for the Salem-Keizer Urbanized Area's Section 5310 Enhanced Mobility of Seniors and Individuals with Disabilities Program*. Please see this link for the document: [http://cherriots.org/sites/default/files/5310%20PMPapproved\\_1.pdf](http://cherriots.org/sites/default/files/5310%20PMPapproved_1.pdf)

### Eligible Expenses

Section 5310 funding requires at least 55 percent of the funding apportionment must be:

- Used for capital expenses for public transportation projects that are planned, designed, and carried out to meet the special needs of seniors and individuals with disabilities (i.e. traditional Section 5310 capital projects).
- Projects must directly serve and have a specific benefit to seniors and individuals with disabilities.
- Mobility management expenses, previously eligible under Section 5317, are eligible and qualify for this traditional Section 5310 project requirement.

The remaining 45 percent of the funds may be used for operating or capital expenses associated with:

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

- Public transportation projects (capital and operating) that exceed the requirements of the ADA
- Public transportation projects that improve access to fixed route transit service and decrease reliance by individuals with disabilities on complementary paratransit (Cherriots LIFT service)
- Alternatives to public transportation that assist seniors and individuals with disabilities

**Eligible Activities** (*refer to the Program Management Plan for a complete list of eligible projects*):

- Projects that will improve mobility for seniors and people with disabilities, including:
  - Rides for wellness and access to travel information
  - Capital purchases, such as vehicles, passenger shelters and equipment
  - Operational and administrative costs
  - Vehicle and facility preventative maintenance
  - Mobility management
  - Travel information
  - Planning
  - New systems for improving access to transportation (for example, travel training, marketing, centralized call centers)

### Eligible Applicants

Section 5310 funds are limited to the following eligible sub-recipients:

- a. A private non-profit organization; or
- b. State, county, tribal, or local government agency that:
  - Is approved by the State of Oregon to coordinate services for seniors and individuals with disabilities; or
  - Certifies that there are no non-profit organizations readily available in the area to provide the service (C\_9070.1G, p. II-1 & II-2).

The eligible sub-recipients within the Salem-Keizer UGB for traditional Section 5310 projects are:

- State, County, tribal, or local government authorities who are approved by SAMTD to coordinate services for seniors and individuals with disabilities;
- Private non-profit organizations that provide transportation services targeted to seniors and people with disabilities and:

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

- 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).

### Special Note for Non-profit Agencies

If your agency is a private non-profit organization that has not applied for a recent Section 5310 grant, please provide the following agency information (see Appendix for more 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.

### Coordination Requirements

The Federal Transit Administration's (FTA) 5310 program requires that all projects selected for award address at least one need or strategy identified in the *SAMTD Coordinated Public Transportation – Human Services Transportation Plan* dated August, 2016 ("The Coordinated Plan"). A link to this document can be found on the District's website: <http://www.cherriots.org/en/grants>



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

### **Local Match Requirements**

Capital projects require a 20% local match. Operating projects require a 50% local match.

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.

### **Application Submittal Instructions**

1. Application forms are available beginning January 23, 2018.
2. Applications are available for download online at <http://www.cherriots.org/en/grants>. The application is provided as a fillable Adobe pdf document.
3. Completed applications must be received by noon on March 19, 2018, in order to be considered eligible for funding:
  - email the Word document or Adobe pdf to [shofi.azum@cherriots.org](mailto:shofi.azum@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 April 26, 2018, SAMTD Board of Directors Meeting. Alternative formats are available upon request.

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

Further details regarding other contracting matters are contained in the Program Management Plan:

- Eligible Project Activities, p. 2
- Project Selection Criteria, p. 18
- Civil Rights Responsibilities, p. 23
- Section 504 and ADA Reporting, p. 26
- Program Measures (Quarterly Reporting Requirements), p. 27
- Other Provisions, p. 31

### **Grant Award Process:**

SAMTD administers the grant process for these funds, selects the projects, and sends copies of the agreements to FTA for their records. The STIF Advisory Committee (STIFAC) members will convene at a meeting two weeks after the application deadline (Apr. 3, 2018). Applicants are required to present their project ideas to the STIFAC in order for funding recommendations to be made 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 copy to FTA. Grant awards are eligible for reimbursement through June 30, 2019.

### **Timeline:**

- March 19, 2018 – All applications due at SAMTD by 12:00 pm
- March 19, 2018 – Applications mailed and emailed to STIFAC members
- April 3, 2018 (2:00 – 3:00 p.m.) – STIFAC meets to hear applicant presentations and determines priorities to recommend to the SAMTD Board of Directors
- April 3, 2018 (3:00 – 4:30 p.m.) – STIFAC meets to recommend a prioritization ranking of projects to SAMTD Board
- April 26, 2018 – SAMTD Board approval of STIFAC recommendations
- July 1, 2018 – 5310 grant agreements executed

Questions? Contact:

Shofi Ull Azum, Chief Planning and Development Officer, SAMTD

(503) 588-2424, [shofi.azum@cherriots.org](mailto:shofi.azum@cherriots.org)

555 Court St NE, Suite 5230, Salem, OR 97301

## Appendix E: Eligible Activities Including Those That Meet the 55 Percent Requirement

13. ELIGIBLE ACTIVITIES. Section 5310 funds are available for capital and operating expenses to support the provision of transportation services to meet the specific needs of seniors and individuals with disabilities.

Section 5310(b) provides that of the amounts apportioned to states and designated recipients, not less than 55 percent shall be available for traditional Section 5310 projects – those public transportation capital projects planned, designed, and carried out to meet the specific needs of seniors and individuals with disabilities when public transportation is insufficient, unavailable, or inappropriate. Notably, this 55 percent is a floor, not a ceiling – recipients may use more than 55 percent of their apportionment for this type of project.

This means that at least 55 percent of any rural, small urbanized area, or large urbanized area's annual apportionment must be utilized for public transportation capital projects that are planned, designed, and carried out to meet the specific needs of seniors and individuals with disabilities. It is not sufficient that seniors and individuals with disabilities are merely included (or assumed to be included) among the people who will benefit from the project.

Eligible projects for the required 55 percent of capital projects include the capital cost of contracting for the provision of transit services for seniors and individuals with disabilities and other specialized shared-ride transportation services. The purchase of rolling stock for or the acquisition of ADA-complementary paratransit service are eligible capital expenses that may also qualify as public transportation capital projects planned, designed, and carried out to meet the specific needs of seniors and individuals with disabilities when public transportation is insufficient, unavailable, or inappropriate, provided the projects are carried out by eligible sub-recipients (see section 5, above) and these projects are included in the area's coordinated plan.

In addition to the above required capital projects, up to 45 percent of an area's apportionment may be utilized for additional public transportation projects that:

- a. Exceed the ADA minimum requirements,

- b. Improve access to fixed-route service and decrease reliance by individuals with disabilities on ADA-complementary paratransit service, or
- c. Provide alternatives to public transportation that assist seniors and individuals with disabilities with transportation.

Such projects must be targeted toward meeting the transportation needs of seniors and individuals with disabilities, although they may be used by the general public. It is not sufficient that seniors and individuals with disabilities are included (or assumed to be included) among the people who will benefit from the project. FTA encourages projects that are open to the public as a means of avoiding unnecessary segregation of services.

Recipients must clearly identify the projects that are part of the required 55 percent capital projects as part of the grant activity line item narrative descriptions. Many projects may be eligible under both the required and optional criteria, but a discrete set of projects that meet the required criteria constituting at least 55 percent of the grant amount, exclusive of administrative expenses, must be identified. Alternatively, the grant application may assign less than the required 55 percent to such projects if other grants in the same fiscal year utilize more than the required 55 percent, so long as at least 55 percent of the total annual apportionment will be used for required projects. In such cases, a list of the other grants and the funding amounts must be included within the new grant application.

14. ELIGIBLE CAPITAL EXPENSES THAT MEET THE 55 PERCENT REQUIREMENT. Funds for the Section 5310 program are available for capital expenses as defined in Section 5302(3) to support public transportation capital projects planned, designed, and carried out to meet the special needs of seniors and individuals with disabilities when public transportation is insufficient, unavailable, or inappropriate. Examples of capital expenses that meet the 55 percent requirement, which must be carried out by an eligible recipient or sub-recipient as described in section 5 of this chapter above, include, but are not limited to:

- a. Rolling stock and related activities for Section 5310-funded vehicles
  - 1) Acquisition of expansion or replacement buses or vans, and related procurement, testing, inspection, and acceptance costs;
  - 2) Vehicle rehabilitation or overhaul;
  - 3) Preventive maintenance;
  - 4) Radios and communication equipment; and

- 5) Vehicle wheelchair lifts, ramps, and securement devices.
- b. Passenger facilities related to Section 5310-funded vehicles
    - 1) Purchase and installation of benches, shelters, and other passenger amenities.
  - c. Support facilities and equipment for Section 5310-funded vehicles
    - 1) Extended warranties that do not exceed the industry standard;
    - 2) Computer hardware and software;
    - 3) Transit-related intelligent transportation systems (ITS);
    - 4) Dispatch systems; and
    - 5) Fare collection systems.
  - d. Lease of equipment when lease is more cost effective than purchase. Note that when lease of equipment or facilities is treated as a capital expense, the recipient must establish criteria for determining cost effectiveness in accordance with FTA regulations, "Capital Leases," 49 CFR part 639 and OMB Circular A-94, which provides the necessary discount factors and formulas for applying the same;
  - e. Acquisition of transportation services under a contract, lease, or other arrangement. This may include acquisition of ADA-complementary paratransit services when provided by an eligible recipient or sub-recipient as defined in section 5 of this chapter, above. Both capital and operating costs associated with contracted service are eligible capital expenses. User-side subsidies are considered one form of eligible arrangement. Funds may be requested for contracted services covering a time period of more than one year. The capital eligibility of acquisition of services as authorized in 49 U.S.C. 5310(b)(4) is limited to the Section 5310 program;
  - f. Support for mobility management and coordination programs among public transportation providers and other human service agencies providing transportation. Mobility management is an eligible capital cost. Mobility management techniques may enhance transportation access for populations beyond those served by one agency or organization within a community. For example, a nonprofit agency could receive Section 5310 funding to support the administrative costs of sharing services it provides to its own clientele with other seniors and/or individuals with disabilities and coordinate usage of vehicles with other nonprofits, but not the operating costs of service. Mobility management is intended to build coordination among existing public transportation providers and

other transportation service providers with the result of expanding the availability of service. Mobility management activities may include:

- 1) The promotion, enhancement, and facilitation of access to transportation services, including the integration and coordination of services for individuals with disabilities, seniors, and individuals with low-income;
  - 2) Support for short-term management activities to plan and implement coordinated services;
  - 3) The support of state and local coordination policy bodies and councils;
  - 4) The operation of transportation brokerages to coordinate providers, funding agencies, and passengers;
  - 5) The provision of coordination services, including employer-oriented transportation management organizations' and human service organizations' customer-oriented travel navigator systems and neighborhood travel coordination activities such as coordinating individualized travel training and trip planning activities for customers;
  - 6) The development and operation of one-stop transportation traveler call centers to coordinate transportation information on all travel modes and to manage eligibility requirements and arrangements for customers among supporting programs; and
  - 7) Operational planning for the acquisition of intelligent transportation technologies to help plan and operate coordinated systems inclusive of geographic information systems (GIS) mapping, global positioning system technology, coordinated vehicle scheduling, dispatching and monitoring technologies, as well as technologies to track costs and billing in a coordinated system, and single smart customer payment systems. (Acquisition of technology is also eligible as a standalone capital expense).
- g) Capital activities (e.g., acquisition of rolling stock and related activities, acquisition of services, etc.) to support ADA-complementary paratransit service may qualify toward the 55 percent requirement, so long as the service is provided by an eligible recipient/sub-recipient as defined in section 5, above,

and is included in the coordinated plan.

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;
- Applicant has a current Dun and Bradstreet (DUNS) Number;
- Services currently operated by applicant have no pattern of complaints, accidents, or service disruptions;
- Vehicles are maintained in a state of good repair; and
- Applicant has a current Title VI plan or is able to adopt a Title VI plan prior to award.

### **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 Plan;
- Service is accessible to individuals with disabilities in conformance to 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 STIF request).

## **Appendix F – SAMTD Board of Directors’ Success Outcomes and 2024 Organizational Work Plan Tactics**

### **F.1 SAMTD Success Outcomes and 2024 Organizational Work Plan Tactics**

The seven-member Board of Directors of SAMTD is appointed by the State of Oregon governor for four-year terms. Each member represents a certain geographic area within the Salem-Keizer urban growth boundary.

The board has identified a set of success outcomes along with organizational work plan tactics in the 2024 Cherriots Strategic Plan to assist staff in translating SAMTD mission statement into specific actions and policies. They target strategic topics of system operation and help define the steps that need to be taken to progress toward SAMTD’s mission. Table F-1 presents each element along with a brief synopsis of the board’s directions on each topic.



**Table F-1.** SAMTD Board of Directors’ success outcomes and 2024 Organizational Work Plan Tactics

<b>Success Outcome</b>	<b>Organizational Work Plan Tactics</b>
<i>Community Value</i>	<ul style="list-style-type: none"> <li>• Initiate Development of a Climate Action</li> <li>• Integration of Battery Electric Buses / Zero-Emission Awareness</li> <li>• Access</li> <li>• Community Value Surveys</li> </ul>
<i>Customer Satisfaction</i>	<ul style="list-style-type: none"> <li>• Customer Satisfaction Survey</li> <li>• E-fare Implementation</li> <li>• Cherriots Intelligent Transportation System (CITS)</li> <li>• Clean and Safe Passenger Amenities</li> </ul>
<i>Culture of Ownership</i>	<ul style="list-style-type: none"> <li>• Merit-based Performance Management System</li> <li>• Management and Resource Tracking Instrument (MARTI)</li> <li>• Diversity, Equity, and Inclusion (DEI)</li> <li>• Employee Engagement Survey</li> </ul>
<i>Financial Sustainability</i>	<ul style="list-style-type: none"> <li>• The Finance Story</li> </ul>



**To:** Board of Directors  
**From:** Chris French, Service Planning Manager  
Shofi Ull Azum, Chief Planning and Development Officer  
**Thru:** Allan Pollock, General Manager  
**Date:** March 28, 2024  
**Subject:** May 2024 Service Change Briefing

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## ISSUE

Shall the Board receive a briefing regarding Cherriots fixed route service beginning May 5, 2024?

## BACKGROUND AND FINDINGS

This service change will begin on Sunday, May 5, 2024 and be in effect until Saturday, September 1, 2024.

### Local bus service

#### *New Route*

- Route 22 - Kuebler Link
  - **Overview**
    - This route has been developed so that riders that have origins and/or destinations in the southern area of Salem do not have to travel so far out of their way to reach those origins and/or destinations. Route 22 will make connections with Routes 6, 8, 11, and 21. Depending on the time day this route will save at least an hour of travel time in one direction for customers.  
**Please refer to the attached map for more detail.**
  - **Destinations**
    - This route will also bring customers to locations that are currently not served by Cherriots Local service. Those destinations include Costco on Boone Rd. and the Oregon State Police Headquarters on Trelstad Ave. To serve Trelstad Ave., and to provide more nimble service in the future, the route will utilize smaller, 25-foot buses.

- **Routing**
  - The route will start and end at Stop ID 230, Commercial @ Baxter.
    - In the **eastbound direction**, it will be routed along Commercial St., Barnes Ave., Reed Ln., Boone Rd., 27th Ave., Kuebler Blvd., 36th Ave., Trelstad Ave., Kuebler Blvd., Mill Creek Dr., and Truax Dr.
    - In the **westbound direction** it will begin at Stop ID 1932, Truax @ Aumsville Hwy. and be routed along Aumsville Hwy., Kuebler Blvd., 36th Ave., Trelstad Ave., Kuebler Blvd., 27th Ave., Boone Rd., Battle Creek Rd., Kuebler Blvd., Commercial St., Barnes Ave., Alpha St., and Baxter Rd. (See attached map and turn by turn directions for actual routing).
  
- **Frequency and span of service**
  - Route 22 will operate 7 days a week, see table below for first and last departures from Commercial @ Baxter (Stop ID 230) and frequency of service.

Route 22 - Kuebler Link	Weekday	Saturday	Sunday
<b>First departure from Commercial @ Baxter (Stop ID 230)</b>	5:26a	5:55a	7:00a
<b>Last departure from Commercial @ Baxter (Stop ID 230)</b>	11:04p	9:50p	7:40p
<b>Frequency</b>	20 minutes (every 40 min. after 9p)	20 minutes (every 40 min. after 7p)	40 minutes all day

### ***Route/Schedule adjustments***

- Route 6 - Fairview Industrial
  - **Overview**
    - Due to the new Route 22 having layover time scheduled at Commercial @ Baxter, (Stop ID 230), and that stop also being shared with Route 21 - South Commercial, the inbound portion of Route 6 will be rerouted.

The first stop of the inbound trip will be a new stop located on Baxter @ Commercial, (Stop ID 1969). **Please refer to the attached map for more detail.**

- **Routing**
  - Due to the route terminus being moved to Baxter @ Commercial, (Stop ID 1969), the new routing will allow for two way travel along Baxter Rd. and Reed Ln. (See attached map and turn by turn directions for actual routing).
    - New routing:
      - The **inbound** trip will begin from Baxter @ Commercial (Stop ID 1969), then be routed along Baxter Rd., Reed Rd., Boone Rd., and 27th Ave. From there it will turn right onto Kuebler Blvd. and continue as it does today.
      - The **outbound** trip will turn left from Kuebler Blvd. onto 27th Ave., continue through the roundabout, turn right on Boone Rd., then continue as it does today; however, the outbound trip will end at the new Baxter @ Commercial stop.
      - The route will no longer drive on Battle Creek Rd.
- **Schedule**
  - To help avoid blocking traffic at the new Baxter @ Commercial (Stop ID 1969) stop, layover time for the route has been moved from the end of the line. All layover time for the route will take place at DTC.
  - To help with schedule adherence, some segment times (scheduled times between timepoints) in the outbound direction after Baxter @ Commercial (Stop ID 137) have been adjusted.
- Route 21 - South Commercial
  - **New Timepoints**
    - To help facilitate transfers to the new Route 22 for customers, timepoints have been created for the Commercial @ Baxter stops in the outbound (Stop ID 541) and inbound (Stop ID 230) directions. These will be reflected on schedules and driver paddles.

### ***Stop adjustment***

- Route 11 - Lancaster / Verda
  - Lancaster @ Denver (Stop ID 1149)
    - To help with pedestrian access to and from Willamette Town Center, this outbound stop will be moved to the far side of the intersection.

### **Holiday Service**

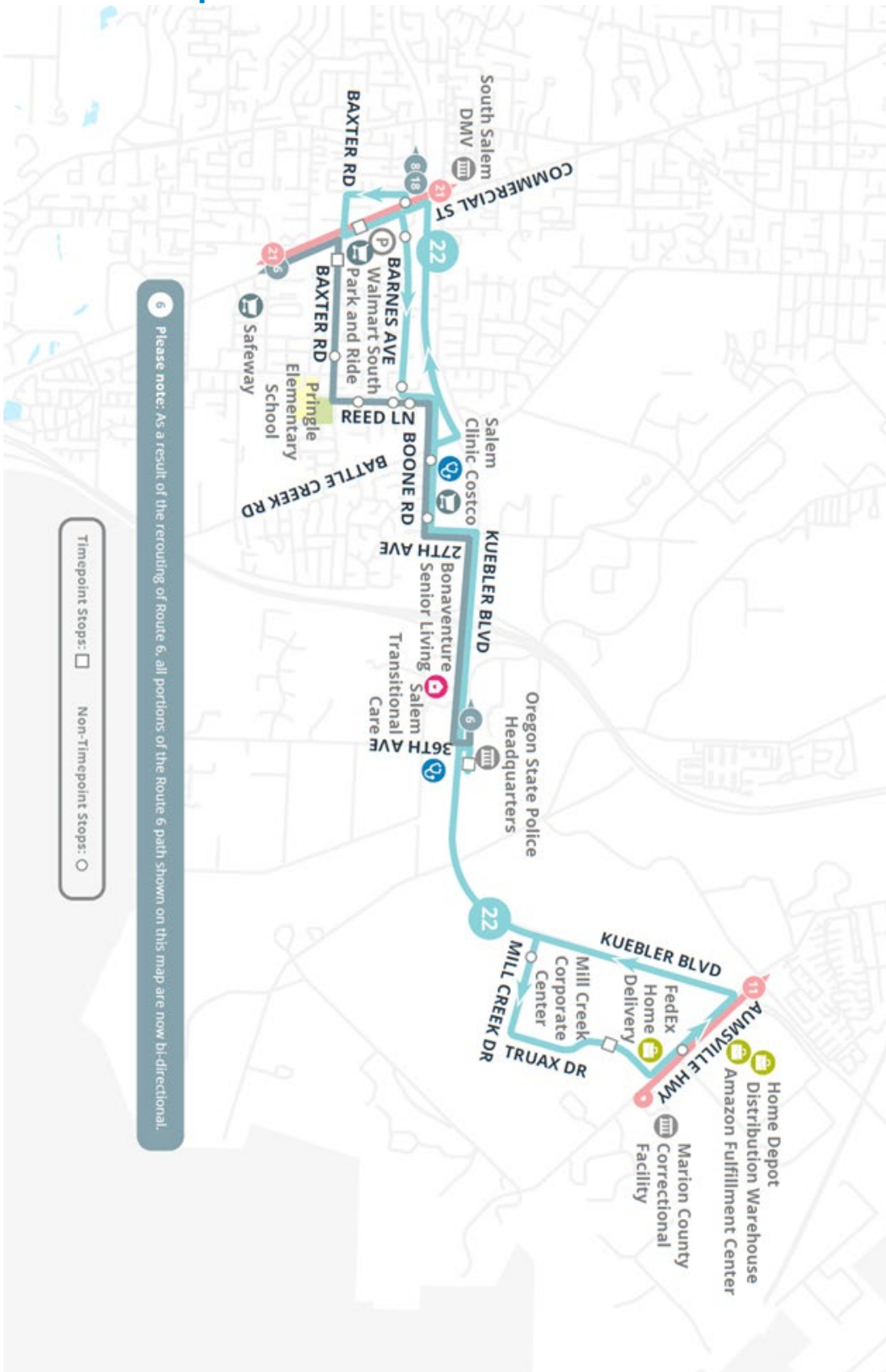
- Memorial Day, May 27
  - Cherriots Local will operate at the **Sunday** service level.
    - Operators who work this holiday will select the **Sunday** block number ending in '02' when signing into the MDT.
- Juneteenth, June 19
  - Cherriots Local will operate at the **Sunday** service level.
    - Operators who work this holiday will select the **Sunday** block number ending in '02' when signing into the MDT.
- Independence Day, July 4
  - Cherriots Local will operate at the **Sunday** service level.
    - Operators who work this holiday will select the **Sunday** block number ending in '02' when signing into the MDT.

### **Cherriots LIFT**

#### **Holiday service**

- Cherriots LIFT will have the same span of service as local buses on Memorial Day, Juneteenth, and Independence Day.

## Route 22 Map



**FINANCIAL IMPACT**

None.

**RECOMMENDATION**

For information only.

**PROPOSED MOTION**

**None.**



# BOARD MEETING MEMO

Agenda Item X

**To:** Board of Directors  
**From:** Allan Pollock, General Manager  
**Date:** March 28, 2024  
**Subject:** Board Member Committee Report

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## ISSUE

Shall the Board report on their activities and committee assignments as representatives of Salem Area Mass Transit District?

## BACKGROUND AND FINDINGS

Board members are appointed to local, regional, or national committees. Board members also present testimony at public hearings on specific issues as the need arises on behalf of SAMTD. Board members may take this opportunity to report committee updates or on any meetings or items of note relating to District business.

Subdistrict 1 Joaquín Lara Midkiff	West Salem Business Association
Subdistrict 2 Director Navarro	State Transportation Improvement Fund Advisory Committee (STIFAC)
Subdistrict 3 Director Carney	Salem-Keizer Area Transportation Study (SKATS) Legislative Committee
Subdistrict 4 Director Hinojos Pressey	
Subdistrict 5 Director Davidson	FY27 Service Enhancement Committee Mid-Willamette Valley Council of Governments (MWVCOG)
Subdistrict 6 Director Duncan	Diversity, Equity, and Inclusion Committee Mid-Willamette Area Commission on Transportation (MWACT)
Subdistrict 7 Director Holmstrom	Community Advisory Committee



**FINANCIAL IMPACT**

None.

**RECOMMENDATION**

For informational only.

**PROPOSED MOTION**

**None.**