



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

Thursday, December 15, 2022 at 6:30 PM

This meeting is open to the public in the Senator Hearing Room at Courthouse Square at 555 Court Street NE, Salem, Oregon 97301. For individuals who are not able to attend the meeting in person, the following options are available to watch the meeting if you have internet access on a cellphone or laptop, or have a television.

- ZOOMGOV \* **Meeting ID:** 160 931 3254 | **Passcode:** 441642  
Go to: <https://cherriots-org.zoomgov.com/j/1609313254?pwd=TjAxbVJ4a3FWbKpXQVRKNXhYd2VLQT09>
- COMCAST CHANNEL 21
- LIVE STREAM: <https://www.capitalcommunitymedia.org/all>
- ONE TAP MOBILE: +16692545252,,1609313254#,,,,\*441642# US (San Jose)
- LANDLINE PHONE: +1 669 254 5252 US (San Jose)

**AGENDA**

**A. CALL TO ORDER**

- Note the Attendance for a Quorum
- Pledge of Allegiance
- Safety Moment

**B. ANNOUNCEMENTS & CHANGES TO AGENDA**

**C. FARE ORDINANCE – First Reading and Public Hearing**

**5**

Shall the Board direct the **First Reading of Ordinance No. 2023-01** by Title and set a Public Hearing beginning with the December 15, 2022 Board meeting to the January 26, 2023 Board meeting to receive citizen testimony regarding proposed changes to the fare structure, fare programs and fare levels as described in the proposed Ordinance No. 2023-01 pursuant to ORS 198.540 and ORS 267.150?

**D. PUBLIC COMMENT – *In writing, by email, in person, or by ZoomGov\****

This is time designated for community members to testify before the Board on any items of Board business, being limited to three minutes. Please send your comments in writing or share your comments before the Board in person or by Zoom:

- Email: [Board@cherriots.org](mailto:Board@cherriots.org)
- Mail: Attn: Cherriots Board, 555 Court St. NE, Suite 5230, Salem, OR 97301

Written testimony will be submitted and entered into the record if it is received by 5:00 p.m. on the day of the meeting.

**E. CONSENT CALENDAR**

Items on the Consent Calendar are considered routine and are adopted as a group by a single motion unless a Board member requests to withdraw an item. Action on items pulled for discussion will be deferred until after adoption of the Consent Calendar.

- 1. Approval of Minutes**
  - a. November 17, 2022 Board of Directors Meeting ..... **31**
- 2. Routine Business Items**
  - a. Adopt Resolution No. 2022-05 Amending the Citizens Advisory Committee Bylaws **41**
  - b. Citizens Advisory Committee Member Appointment & Reappointments [Supplement]
  - c. Citizens Advisory Committee Chair & Vice-Chair Appointments ..... **51**
  - d. Statewide Transportation Improvement Funds Advisory Committee Chair & Vice Chair Appointments ..... **53**
  - e. Adopt Resolution No. 2022-06 Amending the Public Transportation Agency Safety Plan (PTASP) with changes prescribed by the FTA ..... **55**
  - f. Award of Contract with GLAS Architects, LLC, for the provision of general engineering services ..... **107**

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

**G. ACTION ITEMS**

- 1. Adopt the 2043 Long Range Transit Plan ..... **109**
- 2. Award of Contract for Legislative Advocacy Services ..... **159**
- 3. Award of Contract with PIVOT Architecture, for the provision of environmental review, property acquisition assistance, design and engineering, and construction management services ..... **161**
- 4. Approve the 2024-25 Public Transportation Service Providers and Qualified Entity's Statewide Transportation Improvement Fund Applications ..... **165**
- 5. Adopt Resolution No. 2022-07 to approve Federal Section 5310 through ODOT Projects for the 2024-2025 biennium. .... **175**
- 6. Award of Contract with EC Electric to support the battery electric bus charging project at Del Webb. .... **179**

**H. INFORMATIONAL REPORTS - None**

**I. GENERAL MANAGER'S REPORT**

**J. BOARD OF DIRECTORS REPORTS ..... 181**

This is the 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 a representatives of the District.

**K. ADJOURNMENT**

**Next Regular Board Meeting Date: Thursday, January 26, 2023**

- **Virtual Meetings:** The Board of Directors meeting is a public meeting; typically in a place that is ADA- accessible. Board meetings will also be available via *ZoomGov*. The meeting I.D. and passcode are on the top of 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; típicamente en un lugar que sea accesible según la ADA. Sin embargo, esta reunión de la Junta se llevará a cabo virtualmente a través de ZoomGov siguiendo las directivas del Gobernador Brown para mantener a las personas seguras y saludables durante la pandemia de Covid-19.
  - Subtítulos ocultos (CC): la plataforma de transmisión en vivo de ZoomGov incluye subtítulos ocultos (CC). Es una buena herramienta para ayudar a los espectadores a participar en la reunión. Sin embargo, CC no siempre se traduce con precisión.
  - Formatos alternativos Esta es una reunión pública en un lugar accesible a 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 oficina de la administración de Cherriots es de lunes a viernes de 8:00 a. M. A 5:00 p. M.
  - Se distribuyen copias electrónicas del paquete de la agenda de la reunión de la Junta por correo electrónico 6-7 días antes de la reunión. El paquete de la 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).



## **FY 2021 BOARD PRIORITIES AND PRINCIPLES**

Salem Area Mass Transit District, also known as Cherriots, has established priorities and principles that board members can use when representing the District on external committees.

### **Cherriots Board of Directors adopts the following priorities and principles:**

#### **Support of increased public transit funding**

*While Cherriots has seen an expansion of service in recent years, noticeable gaps in frequency and coverage remain in the existing service. As such, we are supportive of initiatives that could support the expansion of public transit in Marion and Polk counties. Funding sources could include federal, state, or local (city and county) revenues.*

#### **Pedestrian and bicyclist infrastructure**

*Transit riders and other community members depend on a strong, multi-modal network to reach their destinations. Large sections of the urban growth boundary do not have sidewalks, and bike infrastructure is inadequate. As Cherriots becomes a mobility integrator, we must advocate for strong "first mile/last mile" infrastructure.*

#### **Environmental justice**

*Decisions on how to allocate resources should be viewed through a lens of environmental justice. New projects should always consider historically underserved communities. For example, an area with higher levels of pollution should be the first to receive funding targeted to mitigate pollution.*

#### **Maintenance of existing travel lanes before building new infrastructure**

*Allocation of funding for automobile travel lanes should prioritize the maintenance of existing infrastructure before building new, costly-to-maintain infrastructure.*

#### **Unaccounted costs**

*Attention should be paid to policies that put the burden of costly infrastructure on the public when the number of individuals who would benefit is nominal. For example, parking minimums increase the cost of housing and commercial properties for everyone, but only drivers of automobiles benefit.*



**To:** Board of Directors

**From:** Ted Stonecliffe, Transit Planner II, Programs  
Chris French, Service Planning Manager

**Thru:** Allan Pollock, General Manager

**Date:** December 15, 2022

**Subject:** First Reading of Fare Ordinance 2023-01

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## ISSUE

Shall the Board direct the First Reading of Ordinance No. 2023-01 by Title and set a Public Hearing beginning with the December 15, 2022 Board meeting to the January 26, 2023 Board meeting to receive citizen testimony regarding proposed changes to the fare structure, fare programs and fare levels as described in the proposed Ordinance No. 2023-01 in **Attachment A** pursuant to ORS 198.540 and ORS 267.150?

## BACKGROUND AND FINDINGS

Every two years, an evaluation of the Cherriots fare structure is conducted at the direction of the Board of Directors. The last fare change for the District occurred in 2019 with the adoption of Ordinance 2019-01 by the Board on February 28, 2019. This prepared the District to begin offering discounted youth fares beginning June 1, 2019. The District hasn't raised fares since January 2015. All fares were removed from all Cherriots services on April 7, 2020 due to the COVID-19 pandemic and the associated emergency declared. Removing fares was necessary to enable rear-door boarding on all Cherriots Local buses and to minimize contact transit operators had with customers. Fares were reinstated on July 6, 2021.

An analysis of fares was postponed in 2021 due to the COVID-19 pandemic. However, now a new ordinance is necessary to make a successful pilot youth fare program permanent and to prepare the District for a new electronic fare payment system. The "Youth Zero" fare program was launched as a zero fare pilot program for all youth riding any Cherriots service beginning on September 4, 2022, and it has been a tremendous success with an 89 percent increase in youth riders for the month of October 2022 alone, compared to the same period in 2021.

This program is sponsored by the cities of Salem and Keizer and the Salem-Keizer School District for one year and will be evaluated at the end of the first year to gather support for continuing this valuable program. Regulations established by the Federal Transit Administration (FTA) only allow “experimental” fare programs to last up to six months. Therefore, the proposed ordinance 2023-01 will extend the Youth Zero program for the subsequent six months and into the future.

Three other changes are proposed with this fare change that include:

- Launching an electronic fare payment system called “*Umo*.”
- Lowering Cherriots Regional and Route 1X fares to the levels of Cherriots Local service.
- Establishing a new universal month pass for Cherriots LIFT customers.

The *Umo* card and associated smartphone application, which are products of Cubic Transportation Systems, will allow riders to pay their fare through a mobile app or a contactless smart card. Riders can manage fares within their *Umo* accounts themselves, by visiting Cherriots Customer Service, or at one of many retail outlets throughout the Cherriots service area. The District heard about the public’s desire for an electronic fare payment system in surveys conducted on-board Cherriots buses in October and November 2021, as well as during the public outreach for the Long Range Transit Plan in 2022. The *Umo* system is being used by many agencies around the country with great success. Three other transit agencies in Oregon that use it are Lane Transit District (Eugene-Springfield), Rogue Valley Transportation District (Medford), and Cascades East Transit (Bend).

Many people find it difficult to pay their fare with cash, and having the e-fare as an option is expected to increase ridership. It is also a very equitable system due to the new way of earning free rides called *fare capping*. Instead of buying a day or month pass, riders will spend stored value in their accounts. When they reach the set value for a day (\$3.20) or month (\$45.00) fare cap, they get the other rides taken that day or month for free. Through this system, people will not have to pay the full amount up front, which is easier on their household budgets. This will be better for low-income families and encourage more people to ride. For unbanked individuals, they can use cash to load stored value on an *Umo* card at a local retailer or Cherriots Customer Service, rather than using a credit card or check, then scan the card when boarding the bus.

The next major change of this proposal is the unification of Cherriots Local, Cherriots Regional, and Route 1X fares. There are many reasons for lowering the regional and Route 1X fares to the level of Cherriots Local fares. First, the public will benefit from a

single Cherriots system. It's easier to understand and navigate from the rider's perspective. Second, when riders use stored value on the *Umo* card or in the app to pay their fares, they will be capped for rides on Cherriots Local, Cherriots Regional, and Route 1X at the same rate, thus encouraging more mobility on the entire system. This will help increase ridership system wide, and make each system more equitable and inclusive. The fare revenue lost to this action will be backfilled by Statewide Transportation Improvement Fund (STIF) formula grant dollars, which is a sustainable source of funding as long as the economy is strong.

Lowering the Cherriots Regional and Route 1X fares to the same level as Cherriots Local fares will allow someone using the Day Pass product to ride the regional buses, as well as the local buses with a single pass. At the adult fare rate, it would cost \$7.75 today for day passes on both Cherriots Regional and Cherriots Local, but with fare unification, a day pass would be only \$3.25. This will make it very easy for someone to ride from Salem to any of the outlying urban and rural communities we serve or vice versa.

The last fare product introduced with this fare change is a new \$90 universal month pass for LIFT customers using the *Umo* system. This will lower the cost for individuals riding LIFT who ride 29 or more times in one month and enable those with conditional eligibility to ride unlimited trips on Cherriots Local, Cherriots Regional, and Route 1X buses, increasing access to these customers. Individual rides on LIFT will remain at \$3.20 due to the high cost of providing this door to door service.

The Cherriots Shop and Ride fares will remain unchanged.

Copies of the proposed fare table are provided in the Ordinance in **Attachment A**. Oregon statutes governing fare changes are provided as a reference in **Attachment B**. A full analysis of the fare change decision-making process is included in the 2022 Fares Analysis Report in **Attachment C**.

A public notice of the fare ordinance proposal as provided in **Attachment D** was published in the Statesman Journal newspaper and in online versions on December 8, 2022; and on the Cherriots website ([cherriots.org](http://cherriots.org)) in both Spanish and English at the same time. The agenda packet posted on the Cherriots Board of Director's website contains a copy of the public notice. There will also be an article in the January issue of Cherriots' e-newsletter, which is distributed to everyone on the Cherriots Marketing email list. Other public outreach activities will include presentations to a few groups representing historically marginalized and disadvantaged populations as well as a tabled event at the Downtown Transit Center Customer Service Lobby in January.

The Board will consider citizen testimony during the Public Hearing and in writing before adopting the new fare ordinance from December 15 until the Second Reading of Ordinance No. 2023-01 at the Public Hearing on January 26, 2023. Written comments may be sent by email to board@cherriots.org and must be received by 12:00 p.m. on January 26, 2023. The proposed changes in the ordinance are proposed to take effect on March 1, 2023.

### **FINANCIAL IMPACT**

The financial impact of implementing a new fare structure has many factors to be considered. By lowering fares, it is expected that ridership will increase 10-20%; mostly on Cherriots Regional and Route 1X. With the introduction of an electronic fare payment system (*Umo*), many people will be able to afford riding transit more than in the past because of the fare capping system. Therefore, an increase of ridership on all services will bring in more revenue. The lost revenue due to the lowering of the Cherriots Regional and Route 1X fares is predicted to be approximately \$90,000 per year, which will be paid by STIF formula grant dollars. One of the purposes of the STIF grant program is to increase access for low-income and other disadvantaged populations throughout the state. The cost of implementing the *Umo* system is accounted for in that project.

### **RECOMMENDATION**

Staff recommends that the Board direct the First Reading of Ordinance 2023-01 by Title; and receive citizen testimony regarding proposed changes to the fare structure, rates, and effective date for transportation services from the December 15, 2022 Board Meeting to the January 26, 2023 Board Meeting pursuant to ORS 198.540 and ORS 267.150.

### **PROPOSED MOTION**

**I move that the Board direct the First Reading of Ordinance No. 2023-01 by Title; and receive citizen testimony regarding proposed changes to the fare structure, rates, and effective date for transportation services from the December 15, 2022 Board Meeting to the January 26, 2023 Board Meeting pursuant to ORS 198.540 and ORS 267.150.**

***This is the First Reading of Ordinance No. 2023-01 by Title: "Ordinance No. 2023-01: Repealing Ordinance No. 2019-01 and Establishing SAMTD Fare Categories and Rates; and Establishing an Effective Date"***





**CF8 B5B79&\$&'!\$%  
REPEALING ORDINANCE NO. 2019-01  
ESTABLISHING SAMTD FARE CATEGORIES, RATES,  
AND ESTABLISHING AN EFFECTIVE DATE**

**WHEREAS**, the Salem Area Mass Transit District (“SAMTD”, herein) has determined that fare categories and rates must be established to enhance operating efficiencies and passenger service;

**WHEREAS**, SAMTD’s goals related to fares focus on using fare structure and policy to:

- Increase ridership
- Improve equitable access to SAMTD’s services
- Facilitate creation of life-long public transportation users
- Encourage choices that promote environmental sustainability
- Balance fare levels to optimize affordability and cost recovery

**WHEREAS**, SAMTD shall consist of, and operate as a single zone for the purpose of determining rates for transportation services provided by or through the District;

**WHEREAS**, the proposed fare rates were presented at a public hearing on December 15, 2022 and a second public hearing on January 26, 2023;

**WHEREAS**, a Title VI fare equity analysis conducted prior to the adoption of this ordinance showed the proposed fare changes to not have any disparate impacts to members of a group identified by race, color or national origin, or disproportionate burdens to low-income populations; and

**WHEREAS**, fare categories, structure and prices for transportation services shall be established by the Board of Directors from time to time by ordinance.

**NOW, THEREFORE, IT IS ORDAINED BY THE SALEM AREA MASS TRANSIT DISTRICT BOARD OF DIRECTORS:**

**THAT**, the Board finds, determines and declares that the adoption of Ordinance 2023-01 is necessary to ensure the continued safe and efficient operations of the District;

**THAT**, the following fare categories, prices and structure are hereby established for transportation service;

**THAT**, the effective date of Ordinance 2023-01 shall be March 1, 2023. Ordinance 2019-01 is repealed and the provisions of any other ordinance heretofore adopted are hereby repealed to the extent that the same are in conflict with the provisions of this ordinance.

<b>FARE CATEGORY</b>	<b>DESCRIPTION</b>
Adult	Passengers who do not fall under any other fare category.
Reduced	Passengers, who qualify as elderly or disabled, according to the criteria of SAMTD policy and procedure.
Youth	Passengers 0 years old up through 18 years of age.
Cherriots LIFT	Passengers who meet the ADA eligibility requirements under CFR 49, Section 37.123, of the Americans with Disabilities Act of 1990.
Employer Pass Program	Passengers using transportation service provided under the employer program offered by, through or on behalf of SAMTD.

**TABLE 1**  
**Fare Prices and Fare Structure\***

	<b>Current Adult</b>	<b>Proposed Adult</b>	<b>Current Reduced</b>	<b>Proposed Reduced</b>	<b>Current Youth</b>	<b>Proposed Youth</b>
<b>Cherriots Local</b>						
1 ride (cash)	\$1.60	\$1.60	\$0.80	\$0.80	\$0.50	\$0.00
Day pass (cash)	\$3.25	\$3.25	\$1.50	\$1.50	\$1.00	\$0.00
30-day pass	\$45.00	\$45.00	\$22.50	\$22.50	\$10.00	\$0.00
Umo card or smartphone app day fare capping	N/A	\$3.20	N/A	\$1.50	N/A	\$0.00
Umo card or smartphone app month fare capping	N/A	\$45.00	N/A	\$22.50	N/A	\$0.00
Umo card or smartphone app annual pass	\$540	\$540	\$270	\$270	\$120	\$0.00

	<b>Current Adult</b>	<b>Proposed Adult</b>	<b>Current Reduced</b>	<b>Proposed Reduced</b>	<b>Current Youth</b>	<b>Proposed Youth</b>
<b>Cherriots Regional</b>						
1 ride (cash)	\$2.25	\$1.60	\$1.50	\$0.80	\$0.50	\$0.00
Day pass (cash)	\$4.50	\$3.25	\$3.00	\$1.50	\$1.00	\$0.00
Month pass	\$60.00	\$45.00	\$30.00	\$22.50	\$20.00	\$0.00
Umo card or smartphone app day fare capping	N/A	\$3.20	N/A	\$1.50	N/A	\$0.00
Umo card or smartphone app month fare capping	N/A	\$45.00	N/A	\$22.50	N/A	\$0.00

	<b>Current Adult</b>	<b>Proposed Adult</b>	<b>Current Reduced</b>	<b>Proposed Reduced</b>	<b>Current Youth</b>	<b>Proposed Youth</b>
Umo card or smartphone app annual pass	N/A	\$540	N/A	\$270	N/A	\$0.00

**Cherriots Shop and Ride**

1 ride shopper shuttle	N/A	N/A	\$1.25	\$1.25	N/A	N/A
1 ride dial-a-ride	N/A	N/A	\$3.20	\$3.20	N/A	N/A
Ticket book (10 tickets) shopper shuttle	N/A	N/A	\$12.50	\$12.50	N/A	N/A

**Cherriots LIFT**

Single fare	N/A	N/A	\$3.20	\$3.20	N/A	N/A
Universal LIFT month pass	N/A	N/A	N/A	\$90.00	N/A	N/A

**Cherriots Route 1X - Wilsonville/Salem Express**

1 ride (cash)	\$3.00	\$1.60	\$1.50	\$0.80	\$0.50	\$0.00
Day pass (cash)	N/A	\$3.25	N/A	\$1.50	N/A	\$0.00
Universal month pass	\$85.00	N/A	\$42.50	N/A	\$42.50	N/A
30-day pass	N/A	\$45.00	N/A	\$22.50	N/A	\$0.00
Umo card or smartphone app day fare capping	N/A	\$3.20	N/A	\$1.50	N/A	\$0.00
Umo card or smartphone app month fare capping	N/A	\$45.00	N/A	\$22.50	N/A	\$0.00
Umo card or smartphone app annual pass	N/A	\$540	N/A	\$270	N/A	\$0.00

\* Proposed changes effective March 1, 2023

Fare Capping

The District may provide riders using stored value on a Umo card to purchase their fares the ability to accumulate stored value on a calendar day and calendar month basis. By accumulating stored value, riders will be charged only up to the eligible rate for qualifying fare types and not more. For example, once a rider has paid total fares equal to the cost of a day or monthly fare capping amount, no more fare is required to ride for the duration of that day or calendar month. Monthly fare capping only applies to fares paid beginning the first day of each month. When accessing stored value on a Umo mobile application or smartcard:

- Fares shall accumulate on a calendar day basis up to the eligible day fare capping rate.
- Fares shall accumulate on a calendar month basis up to the eligible month fare capping rate.
- Rides taken after reaching the maximum fare for the calendar period shall be free for the remainder of that calendar period.

### 30-Day Passes

30-Day passes are available either as a swipe card or via the Umo electronic fare card or smartphone application. These passes are valid on all Cherriots Local, Cherriots Regional, and Route 1X buses.

### Month Passes

Month passes are available as a flash pass. These are valid for the calendar month printed on the pass on all Cherriots Local, Cherriots Regional, and Route 1X buses.

### Universal LIFT Month Passes

Universal LIFT month passes are available to LIFT customers who would like to ride on Cherriots LIFT, Cherriots Local, Cherriots Regional, and/or Route 1X buses and utilize the Umo electronic fare card or smartphone application. Unlimited rides are granted for the month in which the pass is first used.

### Day Passes

Day passes are available to purchase on the bus with cash or via the Umo electronic fare card or smartphone application. These passes are valid on all Cherriots Local, Cherriots Regional, and Route 1X buses.

## **EMPLOYER PASS PROGRAM**

- The Employer Pass Program is available to companies, organizations, and government agencies with 10 or more employees
- The monthly rate for the Employer Pass Program is calculated by multiplying the total number of employees by the qualifying rate. The monthly rate qualifies all employees for a monthly pass:
  - The qualifying rate for for-profit companies is \$4.80 per employee.
  - The qualifying rate for non-profits, state, and federal governments is \$5.60 per employee.

**SALEM AREA MASS TRANSIT DISTRICT**

**ATTEST:**

\_\_\_\_\_  
Ian Davidson, Board President

\_\_\_\_\_  
[Name], Recording Secretary

<b>First Reading:</b>	<u>December 15, 2022</u>
<b>Second Reading:</b>	<u>January 26, 2023</u>
<b>Adoption:</b>	<u>January 26, 2023</u>
<b>Effective Date:</b>	<u>March 1, 2023</u>

**APPROVED AS TO FORM**

\_\_\_\_\_  
Sara Sayles, District Legal Counsel





**ORS § 267.320<sup>1</sup> - User Charges, Fees and Tolls**

- Persons over 65

(1) Except as otherwise provided in this section, to carry out the powers granted by ORS [267.010 \(Definitions for ORS 267.010 to 267.390\)](#) to [267.390 \(Acceptance of funds from United States\)](#), the district board may by ordinance impose and may collect user charges, fees and tolls from those who are served by or use the transit system and other facilities and services of the district.

(2) The district shall not charge a person over 65 years of age a fee of more than 50 percent of the regular fee for transportation provided by the district. The maximum fee established by this subsection does not apply on any weekday, Monday through Friday, between the hours of 5 a.m. and 9 a.m. or between the hours of 3 p.m. and 7 p.m. [1969 c.643 §26; 1973 c.474 §1; 1975 c.124 §1; 1975 c.169 §1; 1981 c.634 §1; 2003 c.14 §131]

**ORS § 198.540<sup>1</sup> - Notice Prior to Adoption of Ordinance Affecting Regulation**

(1) Except in an emergency, an ordinance adopting, amending or repealing a regulation shall not be considered or voted upon by a district board unless the ordinance is included in the published agenda of the meeting. The agenda of a meeting shall state the time, date and place of the meeting, give a brief description of the ordinances to be considered at the meeting and state that copies of the ordinances are available at the office of the district board.

(2) The presiding officer shall cause the agenda to be published not more than 10 days nor less than four days before the meeting, in one or more newspapers of general circulation within the district or, if there is no such newspaper, in a newspaper of general circulation in each county in which the district is located. The presiding officer may also cause the agenda:

- (a) To be posted in three public places within the district at least 10 days before the meeting; or
- (b) To be published by radio and television stations broadcasting in the district as provided by ORS [193.310 \(Definitions for ORS 193.310 to 193.360\)](#) and [193.320 \(Radio and television broadcasts as supplement to newspaper publication\)](#). [1971 c.268 §4]

## **ORS § 267.150<sup>1</sup> - Ordinances**

- Regulating Use of Facilities
- Public Hearings
- Route, Schedule Changes

(1) The legislative authority of a district board shall be exercised by ordinance.

(2) The board may enact police ordinances relating to the protection, use and enjoyment of district property and facilities. A district may appoint peace officers who shall have the same authority as other peace officers, except that such authority shall be limited to the enforcement of police ordinances of the district and the enforcement, for purposes relating to the protection, use and enjoyment of district property and facilities, of state and local laws.

(3) The board may, by ordinance, provide a procedure for the conduct of public hearings on proposed changes in transit routes and schedules. The board may delegate to the general manager or other administrative officer the authority to conduct such hearings.

(4) An ordinance shall not be required for a mass transit district to adopt temporary or experimental changes in routes and schedules. [1969 c.643 §17; 1973 c.116 §2; 1975 c.392 §1]





# 2022 FARES ANALYSIS REPORT

DECEMBER 2022

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## **1.0 Introduction and background**

Every two years, an evaluation of the Cherriots fare structure is conducted at the direction of the Board of Directors. The last fare change for the District occurred in 2019 with the adoption of Ordinance 2019-01 by the Board on February 28, 2019. This prepared the District to begin offering discounted youth fares beginning June 1, 2019.

## **2.0 Proposal for March 2023 fare change**

The Salem Area Mass Transit District hasn't raised fares since January 2015. An analysis of fares was postponed in 2021 due to the COVID-19 pandemic. However, now a new ordinance is necessary to make a successful pilot youth fare program permanent and to prepare the District for a new electronic fare payment system.

### ***2.1 Youth Zero pass***

The "Youth Zero" fare program was launched as a zero fare pilot program for all youth riding any Cherriots service beginning on September 4, 2022, and it has been a tremendous success with an 89 percent increase in youth riders for the month of October 2022 alone, compared to the same period in 2021.

This program is sponsored by the cities of Salem and Keizer and the Salem-Keizer school district, Salem-Keizer Public Schools, for one year and will be evaluated at the end of the first year to gather support for continuing this valuable program. Regulations established by the Federal Transit Administration (FTA) only allow "experimental" fare programs to last up to six months. Therefore, the proposed ordinance 2023-01 will extend the Youth Zero program for the subsequent six months and into the future.

### ***2.2 Other proposed changes***

Three other big changes are proposed with this fare change:

- Launching of an electronic fare payment system called "Umo."
- Lowering of Cherriots Regional and Route 1X fares to the levels of Cherriots Local service.
- Establishing a new universal month pass for Cherriots LIFT customers.

### ***2.3 Electronic fare payment system***

The Umo card and associated smartphone application, which are products of Cubic Transportation Systems, will allow riders to pay their fare through a mobile app or a contactless smart card. Riders can manage fares within their Umo accounts themselves, by visiting Cherriots Customer Service, or at one of many retail outlets throughout the Cherriots service area. Cherriots heard about the public's desire for an

electronic fare payment system in surveys conducted on-board Cherriots buses in October and November 2021 as well as during the public outreach for the Long Range Transit Plan in 2022. The Umo system is being used by many agencies around the country with great success. Three other transit agencies in Oregon that use it are Lane Transit District (Eugene-Springfield), Rogue Valley Transportation District (Medford), and Cascades East Transit (Bend).

Many people find it difficult to pay their fare with cash, and having the e-fare as an option is expected to increase ridership. It is also a very equitable system due to the new way of earning free rides called fare capping. Instead of buying a day or month pass, riders will spend stored value in their accounts. When they reach the set value for a day or month fare cap, they get the other rides taken that day or month for free. Through this system, people will not have to pay the full amount up front, which is easier on their household budgets. This will be better for low-income families and encourage more people to ride. For unbanked individuals, they can use cash to load stored value on a Umo card at a local retailer or Cherriots Customer Service, rather than using a credit card or check, then scan the card when boarding the bus.

#### ***2.4 Lowering Cherriots Regional and Route 1X fares***

The next major change of this proposal is the unification of Cherriots Local, Cherriots Regional, and Route 1X fares. There are many reasons for lowering the regional and Route 1X fares to the level of Cherriots Local fares. First, the public will benefit from a single Cherriots system. It's easier to understand and navigate from the rider's perspective. Second, when riders use stored value on the Umo card or in the app to pay their fares, they will be capped for rides on Cherriots Local, Cherriots Regional, and Route 1X at the same rate, thus encouraging more mobility on the entire system. This will help increase ridership system wide and make each system more equitable and inclusive. The fare revenue lost to this action will be backfilled by Statewide Transportation Improvement Fund (STIF) formula grant dollars, which is a sustainable source of funding as long as the economy is strong.

Lowering the Cherriots Regional and Route 1X fares to the same level as Cherriots Local fares will allow someone using the Day Pass product to ride the regional buses as well as the local buses with a single pass. At the adult fare rate, it would cost \$7.75 today for day passes on both Cherriots Regional and Cherriots Local, but with fare unification, a day pass would be only \$3.25. This will make it very easy for someone to ride from Salem to any of the outlying urban and rural communities we serve or vice versa.

## 2.5 Universal LIFT month pass

The last new fare product introduced with this fare change is a new \$90 universal month pass for LIFT customers using the Umo system. This will lower the cost for individuals riding LIFT who ride 29 or more times in one month and enable those with conditional eligibility to ride unlimited trips on Cherriots Local, Cherriots Regional, and Route 1X buses, increasing access to these customers. Individual rides on LIFT will remain at \$3.20 due to the high cost of providing this door to door service.

## 2.6 Cherriots Shop and Ride fares

The Cherriots Shop and Ride fares will remain unchanged.

The current and proposed fare rates are shown in Table 1 below. A financial impact analysis is provided in Appendix B.

**Table 1. Fare Prices and Fare Structure\***

	Current Adult	Proposed Adult	Current Reduced	Proposed Reduced	Current Youth	Proposed Youth
<b>Cherriots Local</b>						
1 ride (cash)	\$1.60	\$1.60	\$0.80	\$0.80	\$0.50	\$0.00
Day pass (cash)	\$3.25	\$3.25	\$1.50	\$1.50	\$1.00	\$0.00
30-day pass	\$45.00	\$45.00	\$22.50	\$22.50	\$10.00	\$0.00
Umo card or smartphone app day fare capping	N/A	\$3.20	N/A	\$1.50	N/A	\$0.00
Umo card or smartphone app month fare capping	N/A	\$45.00	N/A	\$22.50	N/A	\$0.00
Umo card or smartphone app annual pass	\$540	\$540	\$270	\$270	\$120	\$0.00

**Table 1 (continued). Fare Prices and Fare Structure**

	Current Adult	Proposed Adult	Current Reduced	Proposed Reduced	Current Youth	Proposed Youth
<b>Cherriots Regional</b>						
1 ride (cash)	\$2.25	\$1.60	\$1.50	\$0.80	\$0.50	\$0.00
Day pass (cash)	\$4.50	\$3.25	\$3.00	\$1.50	\$1.00	\$0.00
Month pass	\$60.00	\$45.00	\$30.00	\$22.50	\$20.00	\$0.00
Umo card or smartphone app day fare capping	N/A	\$3.20	N/A	\$1.50	N/A	\$0.00
Umo card or smartphone app month fare capping	N/A	\$45.00	N/A	\$22.50	N/A	\$0.00
Umo card or smartphone app annual pass	N/A	\$540	N/A	\$270	N/A	\$0.00
<b>Cherriots Shop and Ride</b>						
1 ride shopper shuttle	N/A	N/A	\$1.25	\$1.25	N/A	N/A
1 ride dial-a-ride	N/A	N/A	\$3.20	\$3.20	N/A	N/A
Ticket book (10 tickets) shopper shuttle	N/A	N/A	\$12.50	\$12.50	N/A	N/A
<b>Cherriots LIFT</b>						
Single fare	N/A	N/A	\$3.20	\$3.20	N/A	N/A
Universal LIFT month pass	N/A	N/A	N/A	\$90.00	N/A	N/A
<b>Cherriots Route 1X - Wilsonville/Salem Express</b>						
1 ride (cash)	\$3.00	\$1.60	\$1.50	\$0.80	\$0.50	\$0.00
Day pass (cash)	N/A	\$3.25	N/A	\$1.50	N/A	\$0.00
Universal month pass	\$85.00	N/A	\$42.50	N/A	\$42.50	N/A
30-day pass	N/A	\$45.00	N/A	\$22.50	N/A	\$0.00
Umo card or smartphone app day fare capping	N/A	\$3.20	N/A	\$1.50	N/A	\$0.00
Umo card or smartphone app month fare capping	N/A	\$45.00	N/A	\$22.50	N/A	\$0.00
Umo card or smartphone app annual pass	N/A	\$540	N/A	\$270	N/A	\$0.00

\* Proposed changes effective March 1, 2023

### 3.0 Title VI Analysis

In compliance with the adopted Cherrriots Title VI Program and its associated policies 710 through 712, an analysis of the fare change as it relates to any potential disparate impacts to minorities and potential disproportionate burdens to low-income people must be made. Due to the fact that all fares are proposed to either stay the same or decrease, many riders will benefit from these changes. And with the implementation of an electronic fare payment system that includes fare capping, everyone who uses the Umo system will benefit. Fare capping allows people to pay as they go rather than asking for a large lump sum up front. This is easier on the budgets of low-income households that struggle to make ends meet on a daily basis.

The fare equity analysis showed that there would only be disparate impacts to minorities and disproportionate burdens for low income individuals if fares were increased on some fare categories, but this proposal keeps fares the same for most riders, reduces fares for others, and offers a universal month pass for LIFT for the first time, which makes that service more affordable even with the high cost of operating the service. The demographics of the Cherrriots Regional and Route 1X buses have changed after the COVID-19 pandemic due to the fact that State employees are teleworking most days and are driving to work other days. The Route 1X riders are now primarily low-income and minority riders who have no other option than public transit. The decrease of the Cherrriots Regional and 1X fares will open up access to more people in low-income households, which is a benefit to the minorities and low-income individuals living throughout the Cherrriots service area. Therefore, there are no disparate impacts or disproportionate burdens found in this analysis.





## List of appendices:

Appendix A. History of Cherriots fares  
Appendix B. Financial impact analysis

## Appendix A. History of Cherrlots Fares

The history of the last twenty years of Cherrlots' fare changes adds context to the discussion. The following contains the history and background:

On September 25, 1998, the Board of Directors adopted Ordinance No. 97-01, to establish rate categories to impose fares or other user fees for the District's transportation services. By resolution, fares were increased five times since 1995. The base fare changes are listed below:

- from 75 cents to 85 cents in 2005
- from 85 cents to \$1.00 in 2006
- from \$1.00 to \$1.25 in 2008
- from \$1.25 to \$1.50 in 2010
- from \$1.50 to \$1.60 in January 2015

As part of the FY2006 budget process, the Board directed staff to evaluate fares every two years to assess the need for changes. This procedure was also recommended as a standard practice in the District's 2004 Strategic Business Plan. On February 23, 2012, the Board declared an emergency to supersede Ordinance No. 10-01 with the adoption of Ordinance No. 12-01 to implement an experimental change in youth fares for the purpose of increasing ridership. A temporary reduction in youth monthly and day passes was implemented for the period March - August 2012.

On August 23, 2012, the Board adopted Ordinance No. 2012-02 repealing Ordinance No. 2012-01 and reduced the number of fare options to simplify the fare structure to make it easier for customers to use and understand; and eliminated the youth fare category and charged youth fares at the same rate as reduced fares for seniors and people with disabilities.

Cherrlots Local fares were increased to \$1.60 for the adult one-ride fare with Ordinance 14-02 adopted by the Board on September 25, 2014.

The last fare change for the District occurred in 2019 with the adoption of Ordinance 2019-01 by the Board on February 28, 2019. This prepared the District to begin offering discounted youth fares beginning June 1, 2019. Youth fares were reduced to \$0.50 per ride and \$10/month with this change.

All fares were removed from all Cherrlots services on April 7, 2020 due to the COVID-19 pandemic and the associated emergency declared. Removing fares was necessary to enable rear-door boarding on all Cherrlots Local buses and minimize contact operators had with customers. Fares were reinstated on July 6, 2021.

# Appendix B. Financial impact analysis

## 2A. Financial Impact

		FISCAL YEAR 2019			PROPOSAL			CHANGE BY FUND							Contracted Regional Fund				
		Rate	Expected Revenue	Actual FY19 Revenue	Proposed Rate	% Change	Projected Revenue Change	Projected Fare Revenue	General Fund						Contracted Regional Fund				
								FY19	Projected Change	Projected FY23 Fare Revenue	Exptected HB2017 Reimbursement	Expected City & School Dist. Reimbursement	Projected Total FY23 Revenue	FY19	Projected Change	Projected FY23 Fare Revenue	Exptected HB2017 Reimbursement	Projected Total FY23 Revenue	
<b>CHERRIOTS LOCAL</b>																			
One-ride	Full	\$1.60	\$165,813	\$154,637	\$1.60	0.0%	\$0	\$154,637	\$154,637	\$0	\$154,637	\$0		\$154,637					
	Reduced	\$0.80	\$20,938	\$18,459	\$0.80	0.0%	\$0	\$18,459	\$18,459	\$0	\$18,459	\$0		\$18,459					
	Youth	\$0.50	\$26,251	\$26,052	\$0.00	-100.0%	-\$26,052	\$0	\$26,052	(\$26,052)	\$0	\$0	\$39,909.53	\$39,910					
Day pass	Full	\$3.25	\$443,060	\$443,060	\$3.25	0.0%	\$0	\$443,060	\$443,060	\$0	\$443,060	\$0		\$443,060					
	Reduced	\$1.50	\$177,470	\$177,470	\$1.50	0.0%	\$0	\$177,470	\$177,470	\$0	\$177,470	\$0		\$177,470					
	Youth	\$1.00	\$120,682	\$120,682	\$0.00	-100.0%	-\$120,682	\$0	\$120,682	(\$120,682)	\$0	\$0	\$184,874.92	\$184,875					
30-day pass	Full	\$45.00	\$363,870	\$363,870	\$45.00	0.0%	\$0	\$363,870	\$363,870	\$0	\$363,870	\$0		\$363,870					
	Reduced	\$22.50	\$209,070	\$209,070	\$22.50	0.0%	\$0	\$209,070	\$209,070	\$0	\$209,070	\$0		\$209,070					
	Youth	\$10.00	\$31,470	\$31,470	\$0.00	-100.0%	-\$31,470	\$0	\$31,470	(\$31,470)	\$0	\$0	\$48,209.46	\$48,209					
Annual pass	Full	\$540	\$23,220	\$1,720	\$540	0.0%	\$0	\$1,720	\$1,720	\$0	\$1,720	\$0		\$1,720					
	Reduced	\$270	\$43,740	\$4,860	\$270	0.0%	\$0	\$4,860	\$4,860	\$0	\$4,860	\$0		\$4,860					
	Youth	\$120	\$1,320	\$43,740	\$0	-100.0%	-\$43,740	\$0	\$43,740	(\$43,740)	\$0	\$0	\$67,006.09	\$67,006					
								<b>Total</b>	<b>\$1,595,089</b>	<b>(\$221,944)</b>	<b>\$1,373,145</b>	<b>\$0</b>	<b>\$340,000</b>	<b>\$1,713,145</b>					
<b>CHERRIOTS REGIONAL (including Route 1X)</b>																			
One-ride	Full	\$2.25	\$23,538	\$97,325	\$1.60	-28.9%	-\$28,116	\$69,209	\$97,325	(\$28,116)	\$69,209	\$22,492.89	\$91,702	\$97,325	(\$28,116)	\$69,209	\$22,492.89	\$91,702	
	Reduced	\$1.50	\$15,012	\$51,157	\$0.80	-46.7%	-\$23,873	\$27,284	\$51,157	(\$23,873)	\$27,284	\$19,098.61	\$46,382	\$15,012	(\$23,873)	\$27,284	\$19,098.61	\$46,382	
	Youth	\$1.00	\$6,059	\$9,222	\$0.00	-100.0%	-\$9,222	\$0	\$9,222	(\$9,222)	\$0	\$0	\$0	\$9,222	(\$9,222)	\$0	\$0	\$0	
Day pass	Full	\$4.50	\$6,125	\$23,774	\$3.50	-22.2%	-\$23,774	\$0	\$23,774	(\$23,774)	\$0	\$19,019.20	\$19,019	\$23,774	(\$23,774)	\$0	\$19,019.20	\$19,019	
	Reduced	\$3.00	\$8,064	\$8,064	\$1.50	-50.0%	-\$8,064	\$0	\$8,064	(\$8,064)	\$0	\$6,451.20	\$6,451	\$8,064	(\$8,064)	\$0	\$6,451.20	\$6,451	
	Youth	\$2.00	\$1,812	\$1,812	\$0.00	-100.0%	-\$1,812	\$0	\$1,812	(\$1,812)	\$0	\$0	\$0	\$1,812	(\$1,812)	\$0	\$0	\$0	
Month pass	Full	\$60	\$73,521	\$79,766	\$45.00	-25.0%	-\$19,942	\$59,825	\$79,766	(\$19,942)	\$59,825	\$15,953.20	\$75,778	\$79,766	(\$19,942)	\$59,825	\$15,953.20	\$75,778	
	Reduced	\$30	\$35,340	\$35,341	\$22.50	-25.0%	-\$8,835	\$26,506	\$35,341	(\$8,835)	\$26,506	\$7,068.20	\$33,574	\$35,341	(\$8,835)	\$26,506	\$7,068.20	\$33,574	
	Youth	\$20	\$6,390	\$6,391	\$0.00	-100.0%	-\$6,391	\$0	\$6,391	(\$6,391)	\$0	\$0	\$0	\$6,391	(\$6,391)	\$0	\$0	\$0	
								<b>Total</b>	<b>\$312,852</b>	<b>(\$130,029)</b>	<b>\$182,823</b>	<b>\$90,083</b>	<b>\$272,906</b>						
<b>CHERRIOTS LIFT</b>																			
One-ride	Full	\$3.20	\$178,759	\$178,758	\$1.60	-50.0%	-\$166,371	\$12,387	\$178,758	(\$166,371)	\$12,387	\$0	\$12,387	\$178,758	(\$166,371)	\$12,387	\$0	\$12,387	

Month pass	Full	N/A	\$0	\$0	\$90.00	N/A	\$56,160	\$56,160	\$0	\$56,160	\$56,160	\$113,563		\$169,723					
									<b>Total</b>	<b>\$178,758</b>	<b>(\$110,211)</b>	<b>\$68,547</b>	<b>\$113,563</b>	<b>\$0</b>	<b>\$182,110</b>				
<b>CHERRIOTS SHOP AND RIDE DAR</b>																			
One-ride	Full	\$3.20	\$9,548	\$9,548	\$3.20	0.0%	\$0	\$9,548											
10-ride	Full	\$32.00	\$2,592	\$2,592	\$32.00	0.0%	\$0	\$2,592											
<b>CHERRIOTS SHOP AND RIDE SS</b>																			
One-ride	Full	\$1.25	N/A	N/A	N/A	N/A	N/A	N/A											
10-ride	Full	\$12.50	N/A	N/A	N/A	N/A	N/A	N/A											
<b>TOTAL</b>			<b>\$1,993,664</b>	<b>\$2,098,839</b>															
<b>NET CHANGE</b>																			
									\$1,773,847	-\$332,155	\$1,441,692	\$113,563	\$340,000	\$1,895,255	\$312,852	-\$130,029	\$182,823	\$90,083	\$272,906
														\$121,408					-\$39,946




**NOTICE OF ORDINANCE ADOPTION**

**NOTICE IS HEREBY GIVEN** by the Salem Area Mass Transit District (SAMTD) Board of Directors, that the Board will consider public comment regarding the adoption of Ordinance 2023-01 to establish Fare Categories, Rates and Methods of Distribution to impose fares or other user fees for transportation services provided by SAMTD pursuant to ORS 198.540 and ORS 267.150. Ordinance 2023-01 will repeal Ordinance 2019-01 adopted on February 28, 2019. The first reading of Ordinance 2023-01 takes place at the Board of Directors meeting on Thursday, December 15, 2022. The second reading of the ordinance will take place at the Thursday, January 26, 2023 Board meeting. Both meetings begin at 6:30 p.m. at Courthouse Square in the Senator Hearing Room (first floor), 555 Court St NE, Salem, OR 97301. If adopted, Ordinance 2023-01 will take effect on March 1, 2023.

Copies of Ordinance 2023-01 may be obtained at the SAMTD administration office, 555 Court St NE, Suite 5230, Salem, OR 97301 between 8:00 a.m. and 5:00 p.m. Monday through Friday or from the Cherriots website at [www.cherriots.org](http://www.cherriots.org). Written comments regarding the proposed ordinance will be accepted until 12:00 p.m., January 26, 2023 and can be emailed to [board@cherriots.org](mailto:board@cherriots.org), or mailed to the attention of the SAMTD Board of Directors. Please include your name and address for the record. Contact Person: Linda Galeazzi, Executive Assistant, phone 503-588-2424.

(Spanish version)

## **AVISO DE ADOPCIÓN DE ORDENANZA**

**POR MEDIO DE LO PRESENTE SE DA AVISO** a través de la Junta de Directores de Salem Area Mass Transit District (SAMTD), que la Junta considerará los comentarios del público con respecto a la adopción de la Ordenanza 2023-01 para establecer categorías de tarifas, tarifas y métodos de distribución para imponer tarifas y otros cobros al usuario para los servicios de transporte proporcionados por SAMTD de conformidad con ORS 198.540 y ORS 267.150. La ordenanza 2023-01 anulará la Ordenanza 2019-01 aprobada el 28 de febrero de 2019. La primera lectura de la Ordenanza 2023-01 tendrá lugar en la reunión de la Junta Directiva el jueves, 15 de diciembre de 2022. La segunda lectura de la Ordenanza tendrá lugar en la Reunión del Consejo del jueves, 26 de enero de 2023. Ambas reuniones comienzan a las 6:30 p.m. en Courthouse Square, en la Sala de Audiencias del Senador (primer piso), 555 Court St NE, Salem, OR 97301. Si se adopta, la Ordenanza 2023-01 entrará en vigencia el 1 de marzo de 2023.

Se pueden obtener copias de la Ordenanza 2023-01 en la oficina de administración de SAMTD, 555 Court St NE, Suite 5230, Salem, OR 97301 de lunes a viernes entre las 8:00 a.m. y las 5:00 p.m. o desde el sitio web de Cherriots en [www.cherriots.org](http://www.cherriots.org). Se aceptarán los comentarios por escrito con respecto a la Ordenanza propuesta hasta las 12:00 p.m. del 26 de enero de 2023 y se pueden enviar por correo electrónico a [board@cherriots.org](mailto:board@cherriots.org), o enviar por correo dirigido a la Junta Directiva de SAMTD. Incluya su nombre y dirección para el registro. Persona de contacto: Linda Galeazzi, Asistente Ejecutiva, teléfono 503-588-2424.



Salem Area Mass Transit District  
BOARD OF DIRECTORS  
MEETING

November 17, 2022

Index of Board Actions

<u>Action</u>	<u>Page</u>
Moved to approve the Consent Calendar: .....	<b>3</b>
1. <u>Approval of Minutes</u>	
a. October 27, 2022 Board of Directors Meeting	
b. October 27, 2022 Work Session	
c. October 22, 2022 Executive Session re: Potential Litigation	
2. Routine Business	
a. Contract Extension Award for a Second Year Option on Petro Card	
b. Reappoint Two Citizen Members to the Budget Committee representing Subdistricts #3 and #5	
 Moved to authorize the General Manager to enter into a contract with VIA Mobility, LLC, for the delivery of a demand response software management tool and approve a multi-year contract to include the base term and all option years, for a combined contract total of \$1,595,000.	 <b>4</b>
 Moved to adopt the proposed FY2023-2024 Budget Calendar by selecting Option B – consolidating the meetings into one week with the Budget Committee meetings being on Tuesday, May 2, 2023, Wednesday, May 3, 2023 and Thursday, May 4, 2023; with the last two meetings only being held if necessary.	 <b>4</b>

SAMTD Board of Directors meetings are video recorded and are available for viewing on YouTube through the Capital Community Media website at <https://www.capitalcommunitymedia.org/all>



Salem Area Mass Transit District  
**BOARD OF DIRECTORS VIRTUAL MEETING**  
**November 17, 2022**

**PRESENT:**

Board: President Ian Davidson; Directors Bill Holmstrom, Ramiro Navarro, Jr., Sara Duncan, Maria Hinojos Pressey, Chi Nguyen and Sadie Carney (virtual)

Staff: Allan Pollock, General Manager; David Trimble, Deputy General Manager; Denise LaRue, CFO; Christina Conner, CHRO; Patricia Feeny, Director of Communication; Tom Dietz, Director of Operations; Steve Dickey, Director of Technology & Program Management; Bobbi Kidd, Strategic Initiative Administrator; Ross Aguilar, System Administrator; Linda Galeazzi, Executive Assistant; and Sara Sayles, SAMTD Legal Counsel (virtual)

Guests: Jeff Hamm, former general manager; Colleen Busch, former board member; Jamey Dempster, Transportation Planning Project Manager, Jacobs Engineering Group; District staff: Ted Stonecliffe, Dan Knauss, Chris French, and Ben Sawyer

**MINUTES**

**CALL TO ORDER**

**6:30 PM**

- A. President Ian Davidson called the meeting to order. Attendance was noted with a quorum of the full board members present. The topic shared for the Safety Moment was about Cyber Security.

**ANNOUNCEMENTS AND CHANGES TO THE AGENDA**

- B. President Davidson announced the resignation of Director Chi Nguyen from the Board as of December 1, 2022. Director Nguyen served Subdistrict #1 in West Salem. She and her family are moving out of the District. That position is now open for a newly appointed representative through the Governor's Office. Linda Galeazzi, the clerk of the Board for 18 years is also retiring in December. A reception was held prior to the Board meeting to honor both Director Nguyen and Linda Galeazzi for their service.

**PRESENTATION**

**C.1 Long Range Transit Plan Draft Review**

Presenters: Jamey Dempster, Transportation Planning Manager, Jacobs Engineering Group

Ted Stonecliffe, Transit Planner II (Programs)

Staff Report: Pages 5-56 of the agenda





Board members were asked to review and provide feedback on a draft of the 2043 Long Range Transit Plan (LRTP) document prior to its adoption at the December 15, 2022 board meeting. In response to questions asked by board members, GM Pollock advised that the best way to send comments about the plan would be through GM Pollock by Wednesday, November 23<sup>rd</sup>.

**PUBLIC COMMENTS** – There were no written or verbal public comments.

**CONSENT CALENDAR**

E. Shall the Board approve the Consent Calendar?

Presenter: President Davidson

Staff Report: Pages 57-74 of the agenda

Moved to approve the Consent Calendar:

1. Approval of Minutes

- a. October 27, 2022 Board of Directors Meeting
- b. October 27, 2022 Work Session
- c. October 22, 2022 Executive Session re: Potential Litigation

2. Routine Business

- a. Contract Extension Award for a Second Year Option on Petro Card
- b. Reappoint Two Citizen Members to the Budget Committee representing Subdistricts #3 and #5

Motion: **Approve the Consent Calendar**  
 Motion By: **Director Sara Duncan**  
 Second: **Director Ramiro Navarro**  
 Vote: **Motion passed: Carney, Davidson, Duncan, Hinojos Pressey, Holmstrom, Navarro and Nguyen (7)**

**ITEMS DEFERRED FROM THE CONSENT CALENDAR** - None

**ACTION ITEMS**

G.1 Shall the Board authorize the General Manager to enter into a contract with VIA Mobility, LLC, for the delivery of a demand response software management tool and approve a project budget of \$1,595,000?

Presenter: Ben Sawyer, Contracted Services Manager

Staff Report: Pages 75-78 of the agenda

Contracted Service Manager, Ben Sawyer advised that software from RouteMatch, that the District had been using is now obsolete and is no longer supported by RouteMatch. A Request for Proposal (RFP) was set to identify a vendor to provide a turn-key demand response software management solution, which would replace the RouteMatch software



in August of 2022. The RFP closed in October 2022. Through the competitive bid process, VIA Mobility, LLC scored as the best value for the District as described in the staff report. The multi-year contract included three base years and four one-year options for a contract total of \$1,595,000. The contract includes software installation, licensing fees, maintenance, hardware installation, and funds for contingencies, if needed. The first year of the contract includes a 20% local match using 5307 funds for software installation and a 10% contingency. The charges for software licensing and maintenance in years 2-7 will be budgeted for, in each of the coming fiscal years, as an operating expense.

In response to questions asked by the board, Manager Sawyer stated that the new software is open source, it will work across all devices and will be CherriotsLIFT-branded. The District owns the data and will have complete control.

**Motion:** Moved to authorize the General Manager to enter into a contract with VIA Mobility, LLC, for the delivery of a demand response software management tool and approve a multi-year contract to include the base term and all option years, for a combined contract total of \$1,595,000.

**Motion By:** President Ian Davidson

**Second:** Director Sadie Carney

**Vote:** Motion passed: Carney, Davidson, Duncan, Hinojos Pressey, Holmstrom, Navarro and Nguyen (7)

G.2 Shall the Board adopt the proposed FY2023-2024 Budget Calendar by selecting the schedule for Option A or B?

Presenter: Denise LaRue, Chief Financial Officer

Staff Report: Pages 79-82 of the agenda

CFO LaRue recollected that the Board had asked staff to poll the citizen members of the budget committee to find out which option they preferred prior to taking action at the October 27<sup>th</sup> meeting, and bring the matter back to the November meeting for action. There are currently five citizen members and two vacancies on the budget committee. When polled to find out which option for budget committee meetings worked best for them, all five citizen members preferred Option B.

**Motion:** Moved to adopt the proposed FY2023-2024 Budget Calendar by selecting Option B - consolidating the meetings into one week with the Budget Committee Meetings being on Tuesday, May 2, 2023; Wednesday, May 3, 2023; and Thursday, May 4, 2023; with the last two meetings only being held if necessary.

**Motion By:** Director Maria Hinojos-Pressey

**Second:** Director Sara Duncan



**Vote:** Motion passed: Carney, Davidson, Duncan, Hinojos Pressey, Holmstrom, Navarro (6)  
**Abstained:** Directors Nguyen abstained since she will no longer be on the Board for budget committee meetings. (1)

## INFORMATION ITEMS

### H.1 January 2023 Service Change Briefing

Staff Report: Page 83-84 of the agenda

Presenter: Chris French, Service Planning Manager

Manager Chris French reported that service changes listed in the staff report on pages 83 and 84 for Cherrriots fixed route services will begin January 1, 2023 and will be in effect until Saturday, May 6, 2023. Service levels will continue to be at 93% pre-pandemic levels due to insufficient operator staffing. Time was opened up for questions from the Board. Manager French advised that employees who work on the holidays, get holiday pay.

### H.2 Performance Report – FY2023 First Quarter

Staff Report: Pages 85-128 in the agenda and a PowerPoint presentation

Presenter: Chris French, Service Planning Manager

Service Planning Manager Chris French reported on the first quarter of fiscal year 2023. The report measures performance from July 1 to September 30, 2022. Total year-to-date ridership on all service days include Cherrriots Shop and Ride at 1,149; Cherrriots Regional deviated-fixed route at 1,016; Cherrriots Regional at 18,454; CherrriotsLIFT at 18, 201; and Cherrriots Local at 618,070.

### H.3 Financial Report – FY2023 First Quarter

Staff Report: Pages 129-138 in the agenda

Presenter: Denise LaRue, Chief Financial Officer

CFO LaRue reported that the quarterly Finance Report provides information about how the budget is being implemented and includes statements for the General Fund, Special Transportation Fund, and Capital Project Fund. The Finance Report contains a statement of budget to actual on a non-GAAP basis that shows by fund the legal appropriations by category with actual amounts and variances. CFO LaRue noted under *Revenues* that *Passenger Fares* is at 22% of the annual budget. *Advertising* was discontinued, but the District will continue to receive *Advertising Revenues* until the end of December 2022 because the vendor had already sold advertising past the contract expiration date of July 31, 2022. *Total Operating Expenditures* of the General Fund are slightly under budget at 22% of total annual budget. All divisions in the General Fund are at or below



the anticipated 25% of total budget, ranging from 16% to 25% of the budget expended. *Transportation Programs Fund* expenditures are at 15% of annual budget. *Total Capital Revenues* in the Capital Project Fund are \$0 at the end of the first quarter, with the drawdowns for first quarter being processed at the end of October. *Capital Project Fund* expenditures are 1% of the adopted budget. Expenses under the Finance Division budget are for the Tyler Munis software implementation. The Operations Division expenses are for the Program Data Integration Software. Expenses under the Technology and Program Management Division are for the South Salem Transit Center project.

## **GENERAL MANAGERS REPORT**

- I. GM Pollock announced that Maintenance is already working on a decorated bus for the December 10<sup>th</sup> holiday parade in Keizer. Board members who wish to ride on the bus with their families should let GM Pollock know as soon as possible. In other news, GM Pollock announced that the District has five new charging stations at the Keizer Transit Center. The Salem/Keizer School District gave the District a Certificate of Appreciation for their support of their Vocational Students Program. There will be no service on the Thanksgiving holiday, November 24; on Christmas Day, December 25, or on New Year's Day, January 1st. The next board meeting is December 15, and the rollout of the Strategic Plan is in progress. A community rollout will begin in January.

## **BOARD OF DIRECTORS REPORTS**

- J. Shall the Board report on their activities and committee assignments as representatives of Salem Area Mass Transit District?

Board Report | page 139 of the agenda

Board members expressed their heartfelt thanks and offered well wishes to Director Chi Nguyen and the clerk of the board, Linda Galeazzi. Linda Galeazzi began her career at the District in June 2004 in the General Manager's Office and has been the clerk of the board for 18 years. Director Nguyen recalled after moving to Salem that she was asked to serve on the Budget Committee in 2017. She agreed and served for two years and then was appointed to the Board. During her time of service while at the meetings, she listened to learn. She served Subdistrict #1 in West Salem and the Edgewater District since 2019. She said that the work they do as board members is fulfilling, and people who live in the area with a heart for service should sign up to be considered for her position.

Director Ramiro Navarro Jr. attended Keizer Chamber's Government Affairs Committee where they considered expansion of Keizer's UGB area. He attended the Statewide



Transportation Improvement Fund Advisory Committee (STIFAC) meeting to hear about the projects submitted by the Public Transportation Services Providers (PTSP) for the STIF formula plan that must be approved by the Qualified Entities (the District) governing body for Marion and Polk Counties, before that plan is submitted to ODOT. He also congratulated Ron Harding and Marja Byers for their appointments as Chair and Vice-Chair on the STIFAC.

Director Sadie Carney said the SKATS Policy Committee meets next week where they will consider the project selection for STIF funding, and Cherriots staff will present a draft of the 2043 Long Range Transit Plan.

Director Maria Hinojos Pressey said the Citizens Advisory Committee did not meet this month. She spoke to Director Nguyen about their time together working on the Board's Diversity, Equity & Inclusion Subcommittee. She said that Director Nguyen helped her to feel more empowered.

Director Sara Duncan will also attend the SKATS meeting when they meet next week. She spoke about the Bike Bus in Portland started by a coach at Alameda Elementary School.

Director Bill Holmstrom said that other than serving on the budget committee, he is waiting for his assignments as a new board member.

President Ian Davidson appointed Directors Carney and Navarro to serve with him on the Board's Legislative Subcommittee before the Board takes action at their January meeting on projects and priorities to support in the coming year. There was no MWACT meeting. However, the Council of Government's Legislative Committee met to discuss the DLCDC and OHCS recommendations for the acute housing crisis. President Davidson thinks that Cherriots can play a small role by providing abundant service. He and GM Pollock met with Superintendent Christy Perry, Susan West, Jonah Hanson, marketing coordinator and Chris French, service planning manager to discuss the youth bus pass program.

**ADJOURN -**

**8:20 PM**

- K. President Davidson dedicated the meeting to Director Chi Nguyen and to Linda Galeazzi Clerk of the Board; and then adjourned the meeting.



Respectfully Submitted

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Ian Davidson, President

Director Chi Nguyen  
Board of Directors  
Subdistrict #1  
July 2019 – December 2022



Linda J. Galeazzi  
Executive Assistant/Clerk of the Board  
General Manager's Office  
June 2004 – December 2022





Linda Galeazzi <linda.galeazzi@cherriots.org>

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## Letter of Resignation

1 message

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**Chi Nguyen** <chi.nguyen@cherriots.org>

Mon, Nov 7, 2022 at 5:04 PM

To: Allan Pollock <Allan.Pollock@cherriots.org>, Ian Davidson <ian.davidson@cherriots.org>

Cc: Linda Galeazzi <Linda.Galeazzi@cherriots.org>

Dear President Davidson and General Manager Pollock,

Please accept this as my letter of resignation. It has been an honor to serve our constituents by ensuring that our transit district delivers world-class service. I am unable to continue my service due to a move out of the district. The sale of my home closes on December 1st, so this month's meeting will also be my last. I will do all that I can to ensure a smooth transition.

--

**Chi Nguyen, MBA - she/her**

Board of Directors, Subdistrict #1

[chi.nguyen@cherriots.org](mailto:chi.nguyen@cherriots.org)

Direct: 503-588-2424







# BOARD MEETING MEMO

Agenda Item E.2.a

**To:** Board of Directors

**From:** Tom Dietz, Director of Operations  
David Trimble, Deputy General Manager

**Thru:** Allan Pollock, General Manager

**Date:** December 15, 2022

**Subject:** Bylaws that Govern the Procedures and Conduct of the Board's Appointed Citizens Advisory Committee

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## Issue

Shall the Board revise the Bylaws that govern the Board's appointed advisory committees?

## Background and Findings

As stated in the Board's Bylaws under *Rule 22. Committees*, any committee authorized by the Board shall perform the duties prescribed by the Board at the time the committee was created. Board-appointed committees are subject to the direction and control of the Board. Recommendations of such committees are considered advisory only.

The Bylaws governing the Procedures and Conduct of the Citizen Advisory Committee were revised on July 23, 2020 with the adoption of Resolution #2020-04. The Citizens Advisory Committee is now recommending a change under Article II, Section 2. Qualifications in the description for the "Youth Leader (High School Student, one year term with a "school year term" option)" to "Youth Leader (between 16-24 years of age.)" in the Bylaws with the adoption of Resolution #2022-05 dated December 15, 2022.

## Financial Impact

There is no financial impact.

## Recommendation

The CAC recommends that the Board adopt Resolution #2022-05 to restate the Bylaws under Article II, Section 2. Qualifications for the description of the "Youth Leader" as described above.

## **Proposed Motions**

**I move to adopt Resolution No. 2022-05 to restate and replace the Citizens Advisory Committee Bylaws that were amended by Resolution 2020-04 dated July 23, 2020, with a revised description under Article II, Section 2. Qualifications for the “Youth Leader (High School Student, one year term with a “school year term” option”) to “Youth Leader (between 16-24 years of age.”).**



**RESOLUTION NO. 2022-05**  
**BYLAWS GOVERNING PROCEDURES AND CONDUCT OF**  
**THE CITIZENS ADVISORY COMMITTEE**

**WHEREAS**, the Salem Area Mass Transit District, hereafter referred to as "District", did on January 25, 1990, adopt Resolution #90-1, setting forth rules governing proceedings and conduct of the Board of Directors of the District, hereafter referred to as "Bylaws" and

**WHEREAS**, the Bylaws included attachments for each of the Board's advisory committees. The bylaws in Attachment A refer to the Rules Governing Proceedings and Conduct of the Elderly/Handicapped Transit Advisory Committee. These bylaws were revised by Resolution #91-02 on March 28, 1991, by Resolution #97-02 on February 27, 1997; and by Resolution #97-28 on December 18, 1997 when the committee was renamed the Senior and Disabled Consumer Advisory Committee. On March 25, 1999, the committee was dissolved by Resolution #99-02 to form the Consumer Advisory Committee; and was superseded by Resolution #11-13 on December 8, 2011 to form the Citizens Advisory Committee (CAC). The Bylaws were amended on December 12, 2013 by Resolution #13-12. In 2015, the CAC was disbanded and reestablished on December 14, 2017 by Resolution #2017-13 and revised on December 12, 2019 by Resolution 2019-10. On July 23, 2020, *Article II, Section 1 Appointment and Membership* of the CAC Bylaws was revised with the adoption of Resolution #2020-04, to allow up to eleven (11) members serving on the CAC; and

**WHEREAS**, the SAMTD Board of Directors wishes to amend the Bylaws.

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

**THAT** the description for the "Youth Leader" under *Article II, Section 2. Qualifications* be changed from "Youth Leader (High School Student, one year term with a "school year term" option)" to "Youth Leader (between 16 – 24 years of age.)"

**THAT** the form of Bylaws attached as Attachment A, titled "Bylaws Governing Procedures and Conduct of the Citizens Advisory Committee of the Salem Area Mass Transit District," is hereby adopted as the restated bylaws of SAMTD on this 15<sup>th</sup> day of December, 2022, following a meeting of the SAMTD Board of Directors.

**ATTEST:**

\_\_\_\_\_  
Ian Davidson, SAMTD Board President

\_\_\_\_\_  
Linda Galeazzi, Recording Secretary



## **BYLAWS GOVERNING PROCEDURES AND CONDUCT OF THE CITIZENS ADVISORY COMMITTEE (CAC) OF SALEM AREA MASS TRANSIT DISTRICT**

### **ARTICLE I –PURPOSE, ROLES AND RESPONSIBILITIES**

#### **Section 1. Purpose and Mission of the CAC Program**

The mission of the Citizens Advisory Committee, established by the Salem Area Mass Transit District (SAMTD) Board of Directors, is to act as an advisory committee to the Board on transportation-related issues of the District.

#### **Section 2. Committee Name and Purpose**

The name of the committee is the Citizens Advisory Committee also referred to as the CAC, hereinafter referred to as “Committee.” The purpose of the Committee shall meet to discuss and make recommendations to the SAMTD Board of Directors, on the District’s transportation policies, programs and services, and perform other duties as assigned by the Board. The Committee shall encourage and promote transportation services that meet the needs of the Salem/Keizer community.

#### **Section 3. Committee Procedures and Duties**

The Committee shall encourage and promote transportation services that meet the needs of the Salem/Keizer community.

The Committee shall establish an Executive Subcommittee. The Committee Chair and Vice-Chair, along with another member appointed by the Chair, shall serve on the Executive Subcommittee. The Executive Subcommittee may meet at a frequency directed by the Committee Chair.

The Executive Subcommittee will lead the efforts to create and implement a two-year plan which will incorporate the actions and goals of the Committee. The working document should be updated and reviewed by the Committee on a quarterly basis.

#### **Section 4. Open Meetings and Records**

All meetings shall be conducted according to Oregon’s Public Meetings Law and are open to the public.

A quorum of the Committee shall consist of a majority of all the members, and a quorum must be present for any business to be conducted. A majority vote of those members present is needed to approve any recommendation. No member may vote unless present.

The meetings shall be conducted in accordance the provisions of Robert's Rules of Order for small boards (11th Ed.). A record of each meeting will be kept with written minutes.

Regular meetings shall be scheduled with at least one week's notice and will be held at the District's Administration Office; or such other place as designated by the District, and so noticed in conformance with applicable laws.

### **Section 5. Ethics**

Members of the Committee must comply with the Oregon Ethics Laws, ORS Ch. 244, and must refrain from using the Committee member's position to obtain financial gain or avoid financial detriment to the member, relative, or business in which the member or relative has an interest. Members and their relatives and members of their household must refrain from accepting gifts in excess of \$50 in any calendar year from anyone who may have an interest in the actions or recommendations of the Committee. In the case of any actual or potential conflict of interest, the Member must publicly announce the actual or potential conflict of interest. Further, in the case of an actual conflict of interest, the Member must refrain from participating in any discussion or vote on the matter.

## **ARTICLE II – APPOINTMENT, MEMBERSHIP, QUALIFICATION, AND TERMS**

### **Section 1. Appointment and Membership**

Members of the Committee are appointed by the SAMTD Board of Directors, and serve at the pleasure of the SAMTD Board of Directors. Based on the discretion of the SAMTD Board of Directors the Committee shall have no more than eleven (11) voting members. Each member must meet anyone or more of the qualifications identified in Article II, Section 2 at the time of their appointment and for the duration of their term.

The Board will attempt to appoint members to the Committee who represent diverse interests, perspectives, geography, and the population demographics of the area.

## **Section 2. Qualification**

To be qualified to serve as a member of the Committee, the person must live and/or work in the SAMTD service area, representative of a cross-section of the Salem/Keizer community, and as much as possible be a person who meets one of the following qualifications:

- Paratransit User
- Recreational/Bike/Pedestrian Advocate
- Social Services Agency Representative
- Medical Community/Care Provider
- Chambers of Commerce/Business Economic Development Organization
- Major Employer (over 100 Employees)
- School District Representative/Educational Community
- Ethnic Community Member
- At-large Member
- Youth Leader (between 16 - 24 years of age)

Voting members appointed to the Committee must live and/or work within the District's service area.

## **Section 3. Terms of Service**

Committee members shall serve for a term of two years, commencing on January 1. Members are eligible for re-appointment for up to two consecutive terms. Terms will be staggered so that no less than one-third and not more than one-half of the voting members have a term that expires in the same year.

A Committee member who has served two consecutive two-year terms may not serve a third consecutive term. However, the Committee member may thereafter be appointed for future terms following the end of their second term after waiting at least 12 months for reappointment.

#### **Section 4. Chair and Vice-Chair Election and Responsibilities**

The Chair and Vice-Chair of the Committee shall be appointed on an annual basis by the Board of Directors. The Chair and Vice Chair shall serve for a term of 12 months; and no more than two consecutive terms. The Committee may recommend to the Board, members to serve as Chair or Vice Chair.

Committee recommendations are to be completed in order for appointments to be made at the December Board meeting prior to the expiration of the Chair and Vice-Chair's term.

The duties of the Chair are to preside at the meetings, and perform other duties assigned by the Board. The Chair, on behalf of the Committee shall present reports to the Board that are necessary to execute any and all of the responsibilities of the Committee. The Chair may, at the Board's direction, appoint sub-committee members to address special topics as needed.

The duties of the Vice-Chair are to perform the duties of the Chair, in the absence of the Chair. The Vice-Chair shall perform other duties as assigned by the Board.

#### **Section 5. Participation**

All members are expected to attend the scheduled meetings. If a member is unable to attend a scheduled meeting, the member must contact District staff or the Chair at least 24 hours or one business day in advance, except in cases of an emergency. The Chair may excuse the absence of a member for good cause. A member who fails to notify the Committee for two consecutive meetings, or misses more than two meetings over a one-year period, will be reported to the SAMTD Board, and the Board may declare that person's position vacant.

#### **Section 6. Removal and Vacancies**

Members of the Committee shall serve at the pleasure of the SAMTD Board of Directors, and may be removed with or without cause at any time, at the sole discretion of the Board of Directors.

The Committee may recommend removal of one of its members to the SAMTD Board of Directors by a vote of the majority of all its voting members. Such recommendation to the Board shall include the reasons for the recommendation.

When a vacancy occurs, the SAMTD Board of Directors may elect to fill the vacant position and the person so appointed will hold their position for the balance of the unexpired term of their predecessor, which term of service shall not be considered in connection with limitations on term of service under Article II, Section 3. The Board of Directors may select an appointee from among people expressing an interest in such appointment, from a call for applications for the position, or in any other manner determined by the Board of Directors.

### **Section 7. Staff Role and Responsibility**

The SAMTD General Manager will designate staff to prepare meeting notices, agendas, and minutes for the Committee. Staff will assist the Committee in orientation, and the preparation and presentation of background information concerning agenda items. Staff will advise and furnish technical assistance as appropriate to carry out the Committee's work.

## **ARTICLE III – MEETINGS**

### **Section 1. Frequency**

The Committee will meet as often as necessary to carry out the responsibilities of the Committee; however, the Committee shall meet at least two times each year. District staff and the Chair will confer as to the meeting schedules. Meetings shall be held at the offices of SAMTD or other place designated by the District in consultation with the Chair, and so advertised in conformance with applicable laws.

### **Section 2. Agendas**

Staff will consult with the Chair in developing meeting agendas. Staff will be responsible for distributing the final agenda including preparing or compiling the associated agenda materials for each meeting.

The agenda and other information associated with any agenda action item will be distributed in advance of the meeting. These may be paper or electronic copies.

### **Section 3. Quorum and Voting**

A quorum of the Committee shall consist of a majority of all the voting members. A quorum must be present for any business to be conducted.



Each member of the Committee has one vote. All actions of the Committee will be by a motion passed by a majority of the members present and voting at a meeting where a quorum is present.

The chair will be entitled to vote.

#### **Section 4. Minutes**

Minutes of Committee meetings will be prepared and distributed by staff. Minutes will note major points discussed and any conclusions reached or actions taken.

#### **Section 5. Recommendations to the SAMTD Board of Directors**

The Chair and the Chair's designee may present recommendations of the Committee to the SAMTD General Manager or SAMTD Board of Directors in person or in writing.

#### **ARTICLE IV - SUBCOMMITTEES**

The Chair may recommend formation of a subcommittee(s), and establish such subcommittee(s) with the Committee's concurrence. Subcommittees may be formed to carry out specific tasks and/or deal with specific issues, bringing their recommendations to the Committee as a whole. The Chair will select or appoint subcommittee members and designate a chair. The Chair of the subcommittee may appoint persons to serve on subcommittees who are not members of the Committee as a whole, provided they have knowledge and experience that will help the subcommittee in completing its assignment.

#### **ARTICLE V - AMENDMENTS**

The SAMTD Board of Directors shall have the authority to amend these bylaws at any meeting of the Board of Directors. The Committee may propose amendments of these bylaws to the Board of Directors.

Adopted by Board Resolution #2022-05 on December 15, 2022.





**To:** Board of Directors  
**From:** Tom Dietz, Director of Operations  
**Thru:** Allan Pollock, General Manager  
**Date:** December 15, 2022  
**Subject:** Board CAC Appointment of Chair and Vice-Chair

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## ISSUE

Shall the Board appoint a member of the Citizens Advisory Committee (CAC) to the positions of CAC Chair and Vice-Chair for a term of twelve months?

## BACKGROUND AND FINDINGS

Historically, per *Article II, Section 4. Chair and Vice-Chair Election and Responsibilities*, the Chair and Vice-Chair of the Committee shall be appointed annually by the Board of Directors. The Chair and Vice Chair shall serve for a term of 12 months; and no more than two consecutive terms. The Committee may recommend to the Board, members to serve as Chair or Vice Chair.

Committee recommendations for a chair and vice-chair will take place at the December 13<sup>th</sup> CAC meeting. After the CAC recommendations occur for Chair and Vice-chair a revised memo adding the recommendations will be provided in the board agenda supplemental packet.

## FINANCIAL IMPACT

This action is related to advisory committee membership and has no fiscal impact.

## RECOMMENDATION

The CAC Committee recommends the Board appoint [XXX] as Chair and [XXX], as Vice-Chair to serve from January 1 to December 31, 2023.

## PROPOSED MOTION

**I move that the Board appoint \_\_\_\_\_ as Chair and \_\_\_\_\_ as Vice-Chair of the Citizens Advisory Committee for a term of 12 months beginning January 1, 2023, ending December 31, 2023.**





# BOARD MEETING MEMO

Agenda Item No. E.2.d

**To:** Board of Directors

**From:** Stephen Dickey, Director of Technology and Program Management  
David Trimble, Deputy General Manager

**Thru:** Allan Pollock, General Manager

**Date:** December 15, 2022

**Subject:** Appointment of Chair and Vice Chair of the Statewide Transportation Improvement Fund Advisory Committee

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## ISSUE

Shall the Board appoint Ron Harding as the Chair, and Marja Byers as Vice- Chair, of the Statewide Transportation Improvement Fund Advisory Committee for a one-year term from January 1 through December 31, 2023, in accordance with the Statewide Transportation Improvement Fund Advisory Committee Bylaws?

## BACKGROUND AND FINDINGS

The Statewide Transportation Improvement Fund Advisory Committee (STIFAC) acts as an advisory committee to the Board on transportation funding of projects associated with the STIF program. The committee currently consists of eight members that consider projects from all qualified transportation service providers in Marion and Polk counties.

In the STIFAC Bylaws under Article 2, Section 4, it states that the terms of the Chair and Vice-Chair be appointed to commence in January of each year. At a meeting preceding January, members of the STIFAC may recommend a Chair and Vice-Chair to serve for a term of 12 months, but for no more than two consecutive years.

At its November 15, 2022 meeting, the STIFAC passed two motions to recommend a Chair, and Vice-Chair selection. The first motion was made to recommend Ron Harding as the STIFAC Chair, and the second motion, recommended Marja Byers as Vice-Chair of the committee. The STIFAC vote was unanimous for both the Chair and Vice-Chair nominations.

## FINANCIAL IMPACT

None



## BOARD MEETING MEMO

Agenda Item No. E.2.d

### **RECOMMENDATION**

The STIFAC recommends that the Board appoint Ron Harding as Chair and Marja Byers as Vice-Chair, for a one-year term from January 1 through December 31, 2023, in accordance with the STIF Advisory Committee Bylaws.

### **PROPOSED MOTION**

**I move that the Board appoint Ron Harding as Chair and Marja Byers as Vice- Chair of the Statewide Transportation Improvement Fund Advisory Committee for a one-year term from January 1 through December 31, 2023.**



**To:** Board of Directors

**From:** David G. Trimble, Deputy General Manager

**Thru:** Allan Pollock, General Manager

**Date:** December 15, 2022

**Subject:** Adopting Resolution No. 2022-06 Amending the Public Transportation Agency Safety Plan (PTASP)

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## ISSUE

Shall the Board adopt Resolution No. 2022-06 amending the Public Transportation Agency Safety Plan (PTASP) for Salem Area Mass Transit District (SAMTD)?

## BACKGROUND AND FINDINGS

At its July 23, 2020 meeting, the Board adopted Resolution No. 2020-07 to establish a Public Transportation Agency Safety Plan (PTASP) required by the Federal Transit Administration (FTA) in its final rule on July 19, 2018, for certain operators of public transportation systems that receive federal funds, under FTA's Urbanized Area Formula Grants.

The District developed a PTASP with consultation guidance from the Oregon Department of Transportation (ODOT) in accordance with FTA regulations. The PTASP is reviewed by the District annually, and every three years as part of the FTA's Triennial Review process. The plan was reviewed during the 2022 Triennial and no deficiencies were found. The PTASP meets all of the regulatory requirements and was also submitted to the regions Metropolitan Planning Organization (MPO).

The PTASP, is a Safety Management System (SMS). It ensures that the District has the necessary organizational structure, training resources, and operational procedures in place to efficiently and effectively align safety priorities and promote continuous improvement in safety performance.

As a result of the Bipartisan Infrastructure Law, codified in 49 U.S.C. 5329(d), there are new requirements that must be included into the District's plan by December 31, 2022.

Those changes were prescribed as follows:

1. Transit Agencies must establish a Safety Committee that is convened by a joint labor-management process and consists of an equal number of frontline employee representatives and management representatives.
2. Transit Agencies must establish a risk reduction program.
3. Transit Agencies must ensure that the agency's comprehensive safety training program includes maintenance personnel; and includes de-escalation training for maintenance personnel, operations (transportation) personnel, and personnel directly responsible for safety.

The District has amended its PTASP to include all of the new requirements established by the FTA. Once the plan is approved by the Board, copies will be sent to Salem-Keizer Area Transportation Study (SKATS) and the Oregon Department of Transportation (ODOT).

At a future Board meeting, staff will provide a detailed presentation on the updated plan and the District's progress toward the plan's goals.

## **FINANCIAL IMPACT**

None

## **RECOMMENDATION**

Staff recommends that the Board adopt Resolution No. 2022-06 amending the Public Transportation Agency Safety Plan for the District by December 31, 2022.

## **PROPOSED MOTION**

**I move that the Board amend Resolution No. 2020-07, dated July 23, 2020, with the adoption of Resolution No. 2022-06 to include new requirements prescribed by the FTA in the PTASP.**





## **Resolution No. 2022-06**

### **AMENDING THE PUBLIC TRANSPORTATION AGENCY SAFETY PLAN FOR SALEM AREA MASS TRANSIT DISTRICT**

**WHEREAS**, the Salem Area Mass Transit District, hereafter referred to as “District,” was required under the Federal Transit Administration (FTA) to establish a Public Transportation Agency Safety Plan (PTASP) as a result of their Final Rule published on July 19, 2018; and

**WHEREAS**, The FTA required certain operators of public transportation systems that received federal funds under FTA’s Urbanized Area Formula Grants to develop safety plans that included the process and procedures to implement Safety Management Systems; and

**WHEREAS**, the District developed a PTASP with Oregon Department of Transportation (ODOT) consultant guidance in accordance with FTA regulations; the Board adopted the Plan by Resolution No. 2020-07 dated July 23, 2020; and, the District submitted the PTASP to ODOT for approval.

**WHEREAS**, the District is required to update the PTASP with changes as a result of the Bipartisan Infrastructure Law, codified in 49 U.S.C. 5329(d), that must be included into the District’s plan by December 31, 2022.

**WHEREAS**, those changes were prescribed as follows: 1) Transit Agencies must establish a Safety Committee that is convened by a joint labor-management process and consists of an equal number of frontline employee representatives and management representatives; 2) Transit Agencies must establish a risk reduction program; 3) Transit Agencies must ensure that the agency’s comprehensive safety training program includes maintenance personnel; and includes de-escalation training for maintenance personnel, operations (transportation) personnel, and personnel directly responsible for safety.

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

**THAT**, the District updated its PTASP to include the new requirements established by the FTA; and

**THAT**, the Board will adopt Resolution No.2022-06 to include the changes in the PTASP prescribed by the FTA; thereby amending Resolution No. 2020-07, and



**THAT**, the PTASP will be sent to Salem-Keizer Area Transportation Study (SKATS), and ODOT as presented; and

**THAT**, staff will provide a detailed presentation on the PTASP, and the District's progress toward the Plan's goals.

**ADOPTED** by the Board of Directors on the 15<sup>th</sup> day of December, 2022, and effective thereupon.

**ATTEST:**

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Ian Davidson, Board President  
SAMTD Board of Directors

---

Linda Galeazzi, Recording Secretary

Public Transportation Agency Safety  
Plan

Salem Area Mass  
Transit District  
(SAMTD)



July 2020  
Updated December 2022

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## Section 1. Transit Agency Information

### General Information

<b>Agency Name</b>	Salem Area Mass Transit District (SAMTD)
<b>Administrative Office</b>	555 Court St. NE, Suite 5230, Salem, OR 97301
<b>Accountable Executive</b>	Allan Pollock, General Manager/CEO
<b>Chief Safety Officer</b>	David G. Trimble, Deputy General Manager
<b>Modes of Service</b>	Fixed Route Bus, ADA Paratransit, Vanpool
<b>FTA Funding Sources</b>	FTA Section 5307, 5310, 5311
<b>Modes of Service Directly Provided</b>	Fixed Route Bus

SAMTD does not provide transit services on behalf of another transit agency or entity.

### Description of Services Provided:

Salem Area Mass Transit District (SAMTD) is the third largest transit district in the state of Oregon. The fixed route service (Cherriots Local), commonly known as “Cherriots,” provides regularly scheduled transit service within the Salem-Keizer urban growth boundary. The Transit District’s Paratransit service (Cherriots LIFT) service provides complementary paratransit service under the Americans with Disabilities Act (ADA). The Cherriots Regional program provides flex and fixed route service in rural areas.

### Additional Facility Information

#### Administrative Offices

General Manager, Deputy General Manager, Communication, Finance and Technology, Strategic Initiatives and Program Management, Human Resources (Safety and Risk Management), and a portion of the Operations Division Department are all located at:

555 Court St NE, Suite 5230

Salem, OR 97301

Phone: 503-588-2424

Fax: 503-566-3933

[info@Cherriots.org](mailto:info@Cherriots.org)

Open weekdays 8 a.m. to 5 p.m.



### **Cherriots Call Center**

3140 Del Webb Ave

Salem, OR 97301

Phone: 503-315-5544

Toll-free: 888-315-5544

Oregon Relay Service: 7-

1-1 Fax: 503-315-5514

Call weekdays, 6 a.m. to 6 p.m.; Saturdays and Sundays, 8 a.m. to 4 p.m.

### **Cherriots LIFT Eligibility Office**

555 Court Street NE, Suite 5230

Salem, OR 97301

Phone: 503-361-7554

Fax: 503-361-7560

[adaeligibility@Cherriots.org](mailto:adaeligibility@Cherriots.org)

Open weekdays 8:30 a.m. to 5 p.m.

### **Customer Service**

Customer Service, Security, and Mobility Assessment offices are all located at: 220 High St NE

Salem, OR 97301

Phone: 503-588-2877

[info@Cherriots.org](mailto:info@Cherriots.org)

Customer Service is open weekdays, 6 a.m. to 7 p.m.; Saturdays, 7 a.m. to 6 p.m.

### **Del Webb Operations Headquarters**

Operations, Contracted Services, Cherriots Call Center, and Transportation Department all located at: 3140 Del Webb Ave

Salem, OR 97301

The Del Webb facility also includes the parking area for buses not in service.

### **Maintenance Facility**

3170 Del Webb Avenue

Salem, OR 97301

### **Downtown Transit Center**

555 Court St NE

Salem, OR 97301

**Keizer Transit Center**

5860 Keizer Station Blvd  
 NE Keizer, OR 97303

**Section 2. Plan Development, Approval, and Updates**

<b>Name of Entity That Drafted This Plan</b>	Oregon Department of Transportation (RLS & Associates) in cooperation with SAMTD		
<b>Signature by the Accountable Executive</b>	<b>Signature of Accountable Executive</b>	<b>Date of Signature</b>	
<b>Approval by the Board of Directors or an Equivalent Authority</b>	<b>Name of Individual/Entity That Approved This Plan</b>	<b>Date of Approval</b>	
	<b>Relevant Documentation (title and location)</b>		
<b>Certification of Compliance</b>	<b>Name of Individual/Entity That Certified This Plan</b>	<b>Date of Certification</b>	
	<b>Relevant Documentation (title and location)</b>		
<b>Version Number and Updates</b>			
<i>Record the complete history of successive versions of this plan.</i>			
<b>Version Number</b>	<b>Section/Pages Affected</b>	<b>Reason for Change</b>	<b>Date Issued</b>
001	22	Addition of Risk Mitigation Plan	12/15/2022
	33	Addition of Safety Committee Change	
	38	Addition of Procurement Language	
	41	Addition of Infectious Disease Section	
<b>Annual Review and Update of the Public Transportation Agency Safety Plan</b>			
<i>Describe the process and timeline for conducting an annual review and update of the Public Transportation Agency Safety Plan.</i>			

The Plan will be reviewed and updated on an annual basis in October of each year. Updated targets will be included in our annual NTD reporting and amendments to the Plan will be approved by Cherriots Board

### Section 3. Safety Performance Targets

#### Safety Performance Targets

Specify performance targets based on the safety performance measures established under the National Public Transportation Safety Plan.

Mode of Transit Service	Fatalities	Injuries	Safety Events	System Reliability	Other	Other	Other
Fixed Route Bus	0	3	1.0/100K	9,000 miles			
Demand Response	0	2	1.0/100K	3,000 miles			

#### Safety Performance Target Coordination

Describe the coordination with the State and Metropolitan Planning Organization(s) (MPO) in the selection of State and MPO safety performance targets.

Salem-Keizer Area Transportation Study (SKATS) is the designated Metropolitan Planning Organization (MPO) for the Salem-Keizer area. The SKATS MPO is directed by a Policy Committee composed of elected representatives from the cities of Keizer, Salem, and Turner; Marion and Polk Counties; the Salem Area Mass Transit District; the Salem-Keizer School District; and a manager from the Oregon Department of Transportation (ODOT) Region 2 office. Mid-Willamette Valley Council of Governments staff provide the day-to-day staff work for SKATS.

Targets Transmitted to the State	State Entity Name	Date Targets Transmitted
	Oregon Department of Transportation	
Targets Transmitted to the Metropolitan Planning Organization(s)	Metropolitan Planning Organization Name	Date Targets Transmitted
	Salem-Keizer Area Transportation Study (SKATS)	

## Section 4. Safety Management Policy

### Safety Management Policy Statement

Salem Area Mass Transit District (SAMTD)/Cherriots strives to provide safe, reliable, comfortable, and innovative transportation options to every member of the community. The Public Transportation Agency Safety Plan (PTASP) has been developed to integrate safety into all Cherriots system operations. By using the procedures contained in the PTASP, Cherriots can continue to improve the safety and security of Cherriots operation and services.

This PTASP describes the policies, procedures, and requirements to be followed by management, maintenance, and operations personnel to provide a safe environment for Cherriots employees, customers, and the public. The goal of this program is to eliminate the human and fiscal cost of avoidable personal injury and vehicle accidents.

Each department has a responsibility under the PTASP. Directors and managers shall provide the continuing support necessary to achieve the PTASP objectives. A key to the success of this effort is for employees to be aware that they are accountable for safely performing the requirements of their position. The success of the program also depends on all employees actively identifying potential hazards and making a commitment to the safety of others.

Cherriots must be aware that decisions and actions often affect the safety of those in other operations. By following the processes described in the PTASP, Cherriots will continue to improve performance and the safety of the system while creating a culture of safety.

Cherriots commitments are to:

- **Support** the management of safety through the provision of appropriate resources that will result in an organizational culture that fosters safe practices, encourages effective employee safety reporting and communication, and actively manages safety with the same attention to results as the attention to the results of the other management systems of the organization;
- **Integrate** the management of safety among the primary responsibilities of all managers and employees;
- **Clearly define** for all staff, managers, and employees alike, their accountabilities and responsibilities for the delivery of the organization's safety performance and the performance of Cherriots safety management system;
- **Establish and operate** hazard identification and analysis, and safety risk evaluation activities--including an employee safety reporting program as a fundamental source for safety concerns and hazard identification--to eliminate or mitigate the safety risks of the consequences of hazards resulting from Cherriots operations or activities, to a point which is consistent with an acceptable level of safety performance;

- **Ensure** that no action will be taken against any employee who discloses a safety concern through the employee safety reporting program, unless disclosure indicates, beyond any reasonable doubt, an illegal act, gross negligence, or a deliberate or willful disregard of regulations or procedures;
- **Comply** with, and wherever possible exceed, legislative and regulatory requirements and standards;
- **Ensure** that sufficient skilled and trained human resources are available to implement safety management processes;
- **Ensure** that all staff are provided with adequate and appropriate safety-related information and training, are competent in safety management matters, and are allocated only tasks commensurate with their skills;
- **Establish and measure** safety performance against realistic and data-driven safety performance indicators and safety performance targets;
- **Continually improve** safety performance through management processes that ensure that appropriate safety management action is taken and is effective; and
- **Ensure** externally supplied systems and services to support operations are delivered, meeting established safety performance standards.

Cherriots Goals for Safety are established as follows:

- Design, construct, test, and operate a transportation system that achieves an optimum level of safety, exceeding the safety performance of other transit districts of a similar size in the United States.
- Identify and evaluate, then eliminate or control, hazards to employees, customers, and the public.
- Meet or exceed all government and industry occupational health and safety standards and practices.
- Maximize the safety of future operations by affecting the design and procurement processes.

The objectives of the PTASP are the means to achieving its goals. They also provide a method of evaluating the effectiveness of Cherriots safety efforts. The PTASP objectives are:

- Integrate safety management and hazard control practices within each Cherriots department.
- Assign responsibilities for developing, updating, complying with, and enforcing safety policies, procedures, and requirements.
- Verify compliance with Cherriots safety policies, procedures, and requirements through performance evaluations, accident/incident trends, and internal audits.
- Investigate all accidents/incidents, including identifying and documenting the causes for the purpose of implementing corrective action to prevent a recurrence.
- Increase investigation and systematic documentation of near misses.

- Identify, analyze, and resolve safety and security-related hazards in a timely manner.
- Minimize system modifications during the operational phase by establishing and utilizing safety controls at system design and procurement phases.
- Ensure that system modifications do not create new hazards.
- Train employees and supervisors on the safety components of their job functions.

Cherriots takes these commitments seriously as the lives of Cherriots riders, employees, and the public depend on Cherriots ability to operate in a culture of safety.

---

Accountable Executive – Allan Pollock, General Manager/CEO

---

Date

## Safety Management Policy Communication

Cherriots realizes the importance of ensuring its employees and riders are aware of Cherriots safety management policies and procedures to effectively manage the system's day-to-day operations. To do this, Cherriots relies on several forms of effective communication.

Employees: Cherriots is constantly evaluating existing policies and procedures to verify their effectiveness. To do this, Cherriots seeks input from all staff to determine if change is necessary based on trends, data analysis, operational changes, or new assets. Several methods are used to communicate policy and/or procedure changes, including:

- Safety Committee
- Employee Online Information System Slides
- Employee Portal (Intranet)
- Newsletters
- Risk Committee
- Service Excellence Team
- Employee memorandum through paycheck, daily manifest of work orders, and agency meetings
- Bulletin board notices
- Employee email notification
- Labor Union notification

Depending on the importance of the policy or procedure change, policies are distributed through email and an electronic confirmation, which is recorded, verifying employees' understanding of the change.

Riders: If a rider policy is changed or added, Cherriots notifies riders through the following methods:

- Notice posted on vehicle and facilities, including effective date and whom to contact for more information;
- Changes to digital rider guidance including schedules and ride guides as appropriate;
- Public Meetings;
- Social Media; and
- Any services impacted by policy changes will include outreach as required by Federal Guidance

## Authorities, Accountabilities, and Responsibilities

As mentioned in the Safety Policy Statement, the ultimate authority for the success of this PTASP falls to the Accountable Executive. The Chief Safety Officer, the administration and management team, as well as all employees, fulfill their commitment to safety on a day-to-

day basis support the AE.

**Accountable Executive (AE):** The Accountable Executive will determine, based on feedback from senior staff, the level of Safety Management System principals to maintain to ensure a safe work environment, rider experience, and community safety. Cherriots AE is committed to providing employees with the tools and training needed to be successful and safe in their roles with Cherriots. The AE will continually strive to create a culture of safety among the employees, and Cherriots expects each employee to play a role in maintaining a safe workplace.

Cherriots AE will be responsible for ensuring an annual budget is developed that provides the necessary funding to support training for new hires and experienced staff, while also maintaining assets in a State of Good Repair (SGR) and/or replacing them, if they are no longer able to function as originally intended.

The AE is Allan Pollock, General Manager. He is responsible for approving changes to this Plan.

**Chief Safety Officer (CSO):** Cherriots has concluded one CSO will be sufficient to manage the day-to-day adherence to this Plan and, while in this role, report directly to the AE. As CSO, this individual will monitor safety and security throughout the organization including sub-contractors. All departments have been notified of the CSO's role and the established reporting requirements relating to safety-related matters.

Cherriots CSO will be responsible for the following:

- Developing and maintaining SMS documentation;
- Directing hazard identification and safety risk assessment;
- Monitoring safety risk mitigation activities;
- Providing periodic reports on safety performance;
- Briefing the Accountable Executive and Board of Directors on SMS implementation progress; and
- Planning safety management training

The CSO is David Trimble, Deputy General Manager. He is responsible for maintaining and monitoring this Plan.



## Roll of Staff to Develop and Manage Safety Management Systems (SMS)

### Accountable Executive

The AE, who also serves as General Manager (Chief Executive), will work with the CSO and Administrative staff to adjust the PTASP as needed based on staff feedback, trends, and data analysis. The AE is vested with the primary responsibility for the activities of the transit district and overall safety performance. The AE fulfills these responsibilities by providing the resources necessary to achieve PTASP goals and objectives by exercising the approval authority for system modifications as warranted. The AE also sets the agenda and facilitates the cooperative decision making of the Executive Leadership Team (management team).

### Chief Safety Officer

For purposes of managing the SMS and PTASP, the CSO will report directly to the AE to determine strategy, policy, and goals for maintaining safety and security for passengers, employees, and the public. The CSO will monitor day-to-day operations and work with staff to identify and mitigate risk through evaluation, feedback, and data analysis.

### Directors and Managers

Directors and managers are responsible for safety within their divisions/departments, including employees, facilities, operations, and services provided. This responsibility includes determining and implementing measures required to counteract safety hazards and problems and coordinating the implementation and maintenance of safety programs within their functional areas. They are also responsible for ensuring that employees have required licenses and up-to-date certifications. Furthermore, they are responsible for communicating safety information to employees, and for assuring that all employees follow all appropriate safety rules and procedures.

### Supervisors

Supervisors are responsible for the safety performance of all personnel and equipment under their supervision. They are responsible for the initial investigation of all accidents and incidents, and for reporting these accidents and incidents to the Human Resources and the Operations Department.

### Employees

All Cherriot's personnel are responsible for performing their work safely and for following established safety-related rules, procedures, and work practices. This includes reporting all accidents, incidents, and hazards to their supervisor per established requirements for the protection of themselves, co-workers, customers, facilities, and equipment.

### Key Staff

Cherriot's staff will be responsible for maintaining high standards of safety, customer service, and security. The Employee Safety Reporting Program (ESRP) will define the employees' role to identify and mitigate risk through open communication to superiors

including the CSO and AE. Administrative staff will be instrumental in ensuring action is taken to reduce risk and the whole system is continuously monitored to ensure actions are effective and appropriate.

Cherriots staff will be involved with updates, modifications, and implementation of the PTASP. Each staff member brings a valued perspective to the development of policies and procedures he or she will be expected to implement. Every opportunity will be given for employees and riders to provide input to increasing safety at Cherriots. Those opportunities include monthly safety meetings, annual employee meetings and training, department meetings, customer and employee surveys, and an open-door policy with access to all management staff.

### Employee Safety Reporting Program (ESRP)

As stated in the [Safety Management Policy Statement](#), Cherriots is determined to provide a safe environment for its employees, riders, and the public. To ensure success, Cherriots has developed an ESRP to enable employees to report any risk or perceived risk to a supervisor, the CSO, or member of administration.

The ESRP allows each employee to report detailed information and observations whether they are a driver in service, maintenance staff, or other on-duty employee. This program dovetails with other methods currently in place to proactively identify hazards or threats. Those methods include, but are not limited to, the following:

- Pre/Post Trip Inspections
- Preventive Maintenance Inspections
- Employee Evaluations
- Facility Maintenance Plan
- Service Evaluation and Planning Program
- Training Program
- Rider and Public Complaint/Compliment Process
- Safety and Employee Meetings
- Incident/Accident Policies
- Safety and Risk Committees

Cherriots has developed a Hazard Reporting Form used to identify and provide information about hazards observed by Cherriots employees while on duty. The three-page form identifies vital information to assist employees in determining an action to mitigate the threat or hazard. This form is not meant to replace accident or incident forms currently being used. It is a proactive reporting method to identify a perceived threat or hazard potentially endangering employees, riders, or the public. The form is located in Appendix A of this Plan.

Effective September 28, 2020, all Cherriots employees will receive one hour of training

on the procedures associated with the Hazard Reporting Form. The training will cover the following areas:

- Locations of blank Hazard Reporting Forms
- When to use a Hazard Reporting Form
- Capturing critical information on the form
- Notification process depending on the hazard
- Proper assessment of the reported hazard
- Supervisor and CSO role in completing the form
- Follow-up process to determine effectiveness of mitigation

The following process is used as part of the ESRP.

#### Immediate Action Required

If an employee has identified a hazard which is perceived to be a risk to the employee, fellow employees, passengers or the public, the hazard must be reported immediately to the on-duty supervisor/dispatcher. Once reported, the employee must determine if immediate action is necessary to prevent additional risk. If immediate action is required, the employee will communicate the risk of no action to the supervisor before taking action if time allows. Once action has been taken to mitigate the potential harm to the employee, others, or property, employee will notify a supervisor of the results of actions taken. Once time allows, the employee will complete the Hazard Reporting Form with complete information and give to the supervisor on-duty.

#### Delayed Action Required

Once a hazard has been identified and assessed to be of no further risk if immediate action is not taken, the Cherrits employee will await further instructions from a supervisor. If the employee determines delayed action is appropriate, a full report must be completed using the Hazard Reporting Form and submitted to the on-duty supervisor.

#### Role of Supervisor

The on-duty supervisor is responsible for advising the employee on immediate action if the situation allows for advice, or delayed action to mitigate a hazard. The supervisor must then review the Hazard Reporting Form to ensure all information is included, adding additional information from their perspective. Once the form is complete it must be reviewed by the CSO to determine action necessary, investigate root cause of hazard, and follow-up.

The CSO is responsible for determining the status of each hazard reported. In some cases, hazards may be identified and are not able to be resolved, but actions are taken to reduce the risk of the hazard. It is Cherrits goal to eliminate all identified hazards if possible. Some hazards may require continuous monitoring to ensure the hazard does not elevate to an action level.

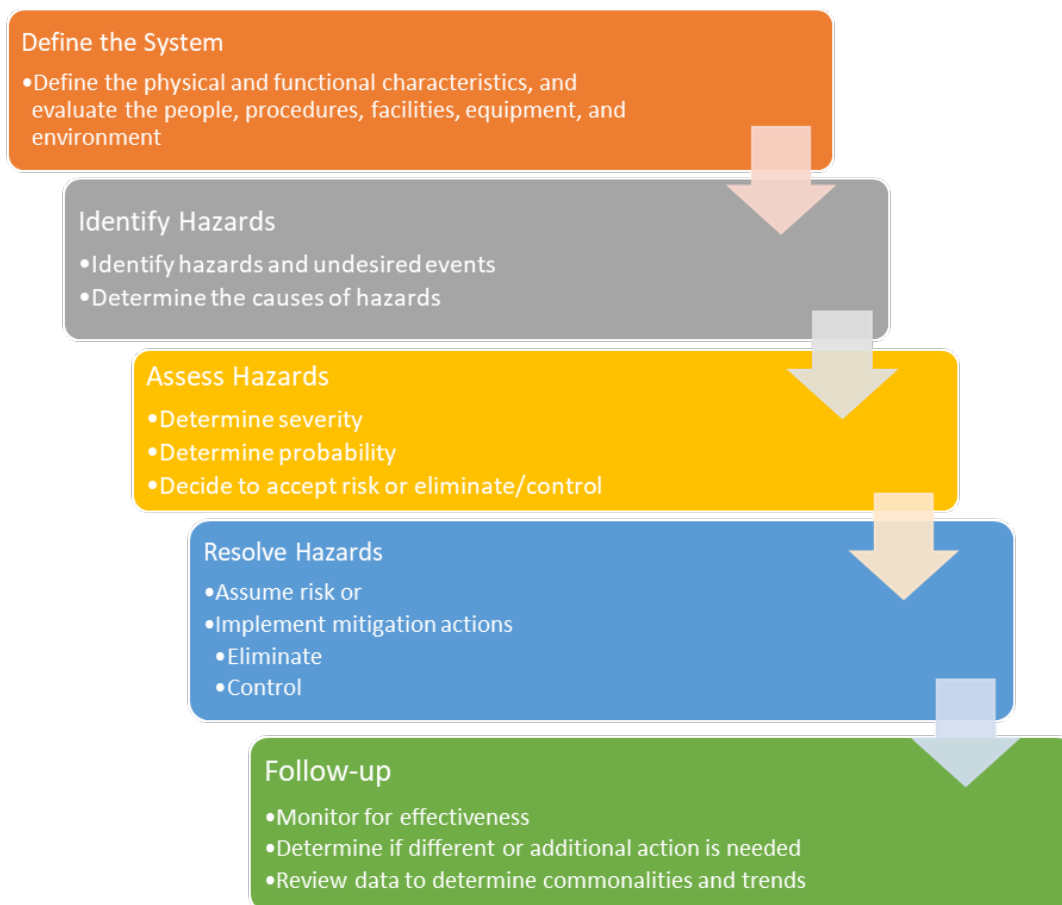
All hazard reports will be documented and integrated into current performance measures and data collection. The CSO will track each hazard to completion and recommend policy or procedural changes, if needed, as a result of the hazard mitigation.

### Cherriots Responsibility

Cherriots takes every hazard report seriously and investigates each one to determine if it's an isolated case or emerging trend requiring evaluation of policies and procedures, or service modifications.

Employees reporting hazards will not face disciplinary action unless that employee contributed to the hazard. Cherriots wants to encourage all employees to report any hazard or threat they observe and help make the Cherriots system as safe as possible for its employees, riders, and the public. Employees may report the hazard to their immediate supervisor, or go directly to the CSO to submit and discuss their report.

The following process chart illustrates the steps taken as part of the hazard identification process through the ESRP.



Continuous Improvement

The objective of safety at Cherriots is to continually improve the processes and operations to maximize safety to the highest practicable level. This effort is undertaken by providing on-going opportunities for employees to be reminded of safety, incorporate safe practices into their operations, to hold open discussions about safe work observations and provide multiple means for each employee to identify potential hazards to develop actions needed in their work place and on the system.

We accomplish this through safety messages, safety committee meetings, safety posters, identification and mitigation of hazards, proactive reviews and inspections to identify potential hazards. In addition to the above Cherriots, personnel can make suggestions to any department or group where they may see an area of needed safety improvement. Any employee can have a request for safety assessment, which is administered by the SSE Division. Through the continuous improvement process, Cherriots is then able to develop and carry out a plan to address identified safety deficiencies by:

- Prioritizing identified deficiencies and systemic hazards;
- Developing strategic initiatives to overcome known deficiencies;
- Re-evaluating progress on improvement measures through the Cherriots SMS.
- Periodic review of the ASP

## Section 5. Safety Risk Management

Cherriots provides training to all personnel in the identification of hazards and security threats while also providing tools to enable personnel to report these risks. Once the risk has been identified, Cherriots conducts an assessment of the risk to determine the necessary response and response time. The response may include further investigation or monitoring, action(s) to mitigate the hazard or security threat, and follow-up assessment to ensure action taken is appropriate and effective.

### Safety Hazard Identification

Hazard and security threats are identified through different methods of monitoring the system. This includes system, employee, and asset assessments conducted daily and on incremental basis. Cherriots conducts the following routine and random evaluations of the system in the following departments:

#### Personnel

Each Cherriots employee is evaluated annually to ensure they are performing their job to the expectations of the agency. As part of their orientation process the employee is provided training and tools to perform their job while not receiving permanent status until completing 180 days of employment. During the 180-day period, the employee is evaluated to determine if they are properly prepared to perform their job.

Additional evaluations of the employee are conducted throughout the year through spot-checks of various aspects of their job function. If through spot-check, or annual evaluation it is determined the employee's performance does not meet expectations or training standards, remedial training will be provided and additional evaluations will take place to ensure remedial training was effective.

### Assets

Rolling stock, facilities, and equipment are monitored through a vigorous preventive maintenance plan aimed at identifying hazards and deficiencies as part of daily and scheduled inspections. Transportation and Maintenance Departments coordinate the preventive maintenance program including Daily Vehicle Inspection Reports (DVIRs), incremental, and annual inspections.

Cherriots updates the FTA-required Transit Asset Management (TAM) Plan annually with data relevant to each asset to include a condition assessment, miles (with rolling stock and non-revenue vehicles) and age as to whether the asset is in a State of Good Repair (SGR). The TAM Plan allows Cherriots management to plan asset replacement or rehabilitation for future years.

### System

As part of Cherriots safety management system monitoring, the agency uses service evaluations when planning, spot-checking or responding to an event like an accident or incident. New routes are strategically developed with safety being the first priority and passenger access second. Cherriots route planners plan and test all routes before activating the route for revenue service. All routes are reviewed periodically to determine if environmental hazards may exist requiring modification to the route, schedule, or vehicle. All front-line staff have been trained to note any changes to service which may be considered a hazard or security threat and through the ESRP, and notify their supervisors immediately or upon return to Cherriots depending on the severity of the hazard.

### Hazard Identification Procedure

Any employee seeing something through inspection or observation they deem to be a hazard, is instructed to immediately report that hazard to their immediate supervisor regardless of the perceived level of threat. Depending on the situation, either the immediate supervisor or the employee will complete a Hazard Reporting Form and submit it to the CSO.

If the hazard requires immediate mitigation, the employee will be instructed on steps to take to reduce the risk which may, or may not, alleviate the risk completely. Additional actions may be taken once the immediate risk mitigation has been taken. Some hazards may not pose an immediate risk, but are still reported and the CSO will be responsible for risk assessment, investigation, and mitigation strategy.

In some cases, a passenger or member of the public may call Cherriots with a complaint about a front-line employee which may rise to the level of hazardous behavior or actions. Cherriots currently documents all customer complaints/compliments and takes appropriate action to investigate any complaints. Complaints deemed hazardous will trigger immediate action by on-duty supervisors.

Hazard Identification Forms will be located on all vehicles along with standard safety kits for accident and incident reporting, with all Customer Service Representatives (CSRs), Dispatch, Transportation, and Maintenance Departments. A copy of the form is located in Appendix A.

The Hazard Identification Form will require the employee to briefly describe the hazard noting date, time of day, location, and other pertinent information. The form includes a section for the CSO or immediate supervisor to document immediate action taken to reduce risk, a risk assessment chart prioritizing the risk, and a section for additional follow-up action. All forms will be processed by the CSO and summarized periodically for trend analysis and included in safety performance measures.

49 CFR part 673.5

*Hazard* means any real or potential condition that can cause injury, illness, or death; damage to or loss of the facilities, equipment, rolling stock, or infrastructure of a public transportation system; or damage to the environment.

## Safety Risk Assessment

All Cherriots staff have been provided with training appropriate for their positions within the organization. Cherriots expects its employees to respond to hazards or threats with professional judgment as sometimes there might not be time to contact a supervisor to prevent an emergency event.

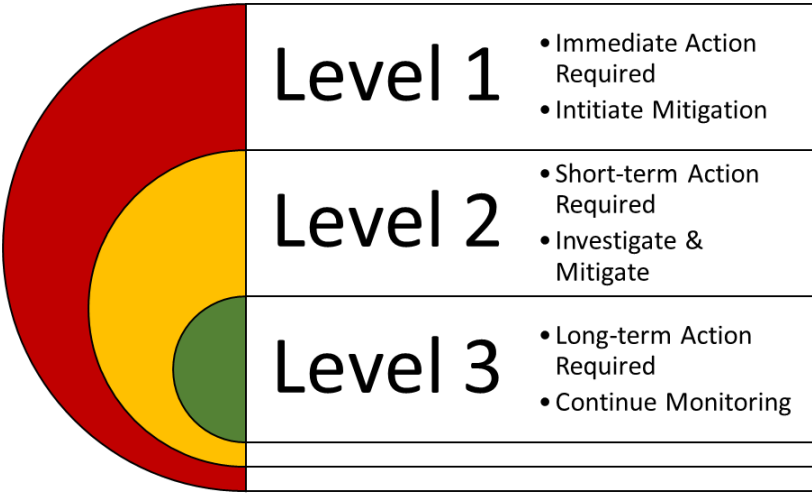
In cases where the hazard can be reported without immediate risk, the employee will make an initial assessment of the risk as part of their report.

Once received by the CSO, the initial risk assessment may be amended requiring immediate, short, or long-term response.

**Level 1** - Immediate: A deficiency, threat or hazard requiring immediate attention to mitigate risk either temporarily until further action can be taken or complete mitigation.

**Level 2** – Short-term: Action is needed within seven days to mitigate an identified deficiency, threat or hazard. The deficiency, threat or hazard does not pose immediate danger, but if no action is taken could elevate to an immediate level risk.

**Level 3** – Long-term: A deficiency, threat or hazard has been identified but does not pose a threat currently, but could at a later time. Continued monitoring and awareness are required.



The CSO in coordination with key staff will investigate each identified hazard, assess the risk, and take appropriate action to mitigate the risk. Additional mitigation may be needed based on follow-up monitoring to the action taken.

### Safety Risk Mitigation

In response to all identified and assessed hazards, Cherriots will take steps to mitigate the hazard and reduce or eliminate the risk to employees, riders, and public. Mitigation strategies will be dependent on results of investigation into the elements contributing to the risks. The investigation may include more than one department and may include interviews outside of the transit system.

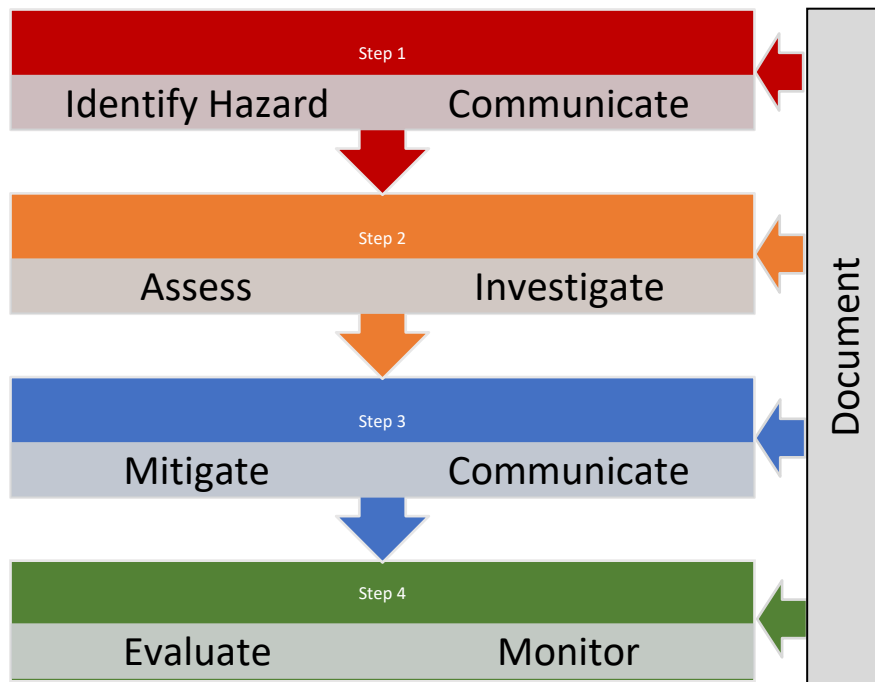
Actions to mitigate risk will include all employees, riders, and the public who may be



impacted by either the hazard or the actions to reduce or alleviate the risk. Cherriots will communicate actions to appropriate staff through methods appropriate to risk assessment. In some cases, immediate communication through two-way communications (dispatch system, text burst, email, or web alert) may be necessary. In other cases, bulletin board notices or memorandum posting may be appropriate.

Once a risk mitigation strategy has been implemented, Cherriots will monitor the actions to determine if full mitigation is possible and, if not, is additional action necessary to alleviate the risk, or is stepped-up monitoring necessary. Some risks may not be completely mitigated, but awareness to the risk is a top priority.

All actions taken to mitigate risk will be documented and linked to the initial deficiency, threat, or hazard identification step.



## PTASP Risk Reduction Program Components

Risk Reduction Program for transit operations to improve safety by reducing the number and rates of accidents, injuries and assaults on transit workers based on data submitted to the NTD, including:

- Components of Risk Reduction Program include a comprehensive Risk Management framework that incorporates systemic components including:
  - **Organizational culture/internal environment:** Risk management doesn't happen in a vacuum; Enterprise Risk Management (ERM) is driven by the organization's attitude to risk.
  - **Objective setting:** Establish ERM goals are: total risk avoidance vs risk tolerance.
  - **Risk identification:** Identify internal and external events that could affect the achievement of ERM objectives. Explore the opportunities as well as the risks.
  - **Risk assessment and measurement:** Assess the risks associated with organizational management and operations. Determine their likelihood, severity and ability to respond.
  - **Risk response, or risk mitigation:** Identify actions to take in line with risk tolerance and appetite for risk.
  - **Control activities:** Determine appropriate [internal and external controls](#) to monitor and test the risk reduction approach. Checks and balances designed to identify any out-of-tolerance activity or results.
  - **Internal communication to drive buy-in:** Communicate RM objectives and strategy with outcomes.
  - **Risk reporting and monitoring:** Report outcomes regularly to ensure continued buy-in and accountability.
  - **Risk governance:** Monitor and modify RM objectives and efforts regularly based on lessons learned. Finesse controls and governance processes in synergy.

Reduction of vehicular and pedestrian accidents involving buses that includes measures to reduce **visibility impairments** for bus operators that contribute to accidents, including retrofits to buses in revenue service and specifications for future procurements that reduce visibility impairments.

- Vehicular Accident Reduction components –
  - Employee Training and Supervisor Oversight
    - Entry Level Driver Training (ELDT) for all new-hires
    - Driver training and refresher training – Smith System
    - Annual In-service Training
    - Supervisor Ride-along
  - Accident Investigation Process
    - Supervisor Accident Investigation
    - Accident Review Committee
  - Vehicle Modifications and Specification

- Updated vehicle specification on new procurements (Lights, Mirrors, Cameras, etc)
- Monitoring camera and audio on exterior and interior of vehicles
- Pedestrian Accident Reduction components –
  - Employee Training and Supervisor Oversight
    - Customer Service Training
    - Passenger Interaction and Assistance Training
    - Public Contact Tracking
  - Incident Reporting and Investigation Process
    - Incident reporting
    - Incident review by supervisors
  - Vehicle Modifications and Specification
    - Maintain all walking and gripping surfaces
    - Securement of mobility devices
    - Lighting at points of ingress and egress
    - Slip resistance surfacing on steps, ramps, etc

**Mitigation of assaults on transit workers**, including the deployment of assault mitigation infrastructure and technology on buses, including barriers to restrict the unwanted entry of individuals and objects into the workstations of bus operators when a risk analysis performed by the recipient’s Safety Committee determines that such barriers or other measures would reduce assaults on transit workers and injuries to transit workers.

- Employee Training and Supervisor Oversight
  - De-escalation Training during In-service
  - Policy education and training – workplace violence, personal safety
- Incident Reporting and Investigation Process
  - Incident Reporting System (TransTrack)
  - Security Contract and coordination with Security Coordinator
  - Liaison with law enforcement
- Vehicle Modifications and Specification
  - Driver barrier to limit passenger access to driver workspace
  - Radio communications

Risk Reduction – Assaults and De-Escalation Training

All Cherrriots Operations division front-line supervisors (Transportation and Maintenance) will participate in customized, interactive training. Sessions will help attendees to understand historical, systemic, and individual factors that contribute to homelessness and housing insecurity; understand historical, systemic and individual factors that impact individuals experiencing symptoms of various mental conditions.

The training will teach strategies for prioritizing safety while improving interactions with individuals who are in distress and/or are experiencing a mental health and/or situational crises. This will be delivered in customized three-hour interactive facilitated training sessions that will address communication and procedural goals and promote consistency among all employees, supervisors and security personnel. The training will focus on techniques for staff's internal and external communication, including discussing when to and not to engage, and exploring options when faced with various situations and scenarios.

Sessions will be developed around scenarios and questions solicited through an optional questionnaire and meetings with a manager. The sessions will be facilitated to inspire interaction and engagement and will be flexible to the questions, comments, and specific needs of the participants.

#### Risk Reduction – Frontline Employees (In-Service and Ongoing Training)

All customer-facing employees will participate in pre-escalation and de-escalation training delivered by the Security and Emergency Management department staff. This facilitated training consists of the following topics:

- Definitions of Pre and De-escalation terminology
- Situational Awareness
- Techniques to maintain your composure
- Being empathetic and identifying potential mental illness
- Utilizing applied tools and methods to recognize situations
- Reducing intensity of Conflicts
- Techniques for avoiding volatile situations
- How to request assistance in the field
- Techniques to remain calm in difficult situations
- Discussion on past experiences
- Managing your personal safety.

## Section 6. Safety Performance Monitoring and Measurement

Safety performance monitoring and measurement involves the continual monitoring of the transit agency's activities to understand safety performance. Through these efforts, Cherrlots can determine whether it is meeting its safety objectives and safety performance targets, as well as the extent to which it is effectively implementing SMS.

Cherrlots is constantly striving to maintain the highest level of safety through its monitoring methods to include adherence to policies and procedures, safety and maintenance plans, and system and employee evaluation processes. These methods allow Cherrlots to determine the need to make changes to improve policies, employee training, and service

delivery.

## Maintenance

### Maintenance Standards and Procedures

Standards and procedures are included in the SAMTD Fleet Maintenance Plan. In general, maintenance procedures are designed to ensure that the maintenance recommendations of the manufacturer are met, maximum efficiency in performance and operation is obtained, and maximum bus life and condition are maintained. Daily bus inspections, an active Preventive Maintenance Program, contractor oversight, and careful monitoring are included in procedures to ensure the safety of buses and adequacy of the Fleet Maintenance Plan.

### Operator Inspections

All operators are required to perform a pre-trip and post-trip inspection to ensure that the vehicle is safe and in good operating condition. If any defects are noted by the operator, a Defect Slip is completed and, depending on the severity and extent of the defect, the vehicle may be repaired or taken out of service until a repair can be made. In the case of a defect that develops or is noted once a vehicle is in service, the operator is required to communicate the problem to Transportation, who will then notify Maintenance.

### Daily Servicing and Inspections

Maintenance team members inspect and service every bus used in revenue service each day. The buses are fueled and washed, all fluids are checked, tires and lugs are checked, and the vehicle is inspected for any leaks or unusual noises. The Service Workers clean the bus interiors each day. When a defect is noted, it is reported to the Mechanic, or Supervisor on shift, so that evaluation and, if necessary, a repair can be conducted.

### Mileage-Based Maintenance Inspections

All buses receive preventive maintenance inspections (PMI) at designated mileage intervals. Mileages are determined by vehicle and subcomponent manufacturers and real-world experience. Oil sampling is performed periodically for both engines and transmissions. A description of the schedule and type of inspection and service performed for each bus series is included in the Fleet Maintenance Plan.

## Operations

### Facility Monitoring

Formal facility inspections of all Cherriot's facilities and grounds are conducted by members of the Safety Committee quarterly using a facility checklist. The purpose of the inspections is to identify any unsafe or unhealthy conditions which may exist, and that may require maintenance or modification. Each facility is also visually inspected for compliance with Occupation Safety Health Administration and local fire codes.

Any guests to the Cherriots administration facility must check in through a secured process requiring check-in and validation of visit purpose. Employees are trained on procedures for visitors in the workplace and facility access is limited through security systems.

### Frequency

The Facility Maintenance Department conducts quarterly safety inspections. Mechanics and Facilities Maintenance employees look for potential hazards with equipment whenever they are using that equipment. The vehicle hoists, chain pulls, and cranes in the vehicle maintenance shop are inspected annually by contractors. Preventive maintenance of equipment and facilities is performed in accordance with the manufacturer's recommended practice. Hazards are also identified by analyzing work accident trends, through Hazard Report Forms submitted by employees. Forms are used by employees to report safety concerns and to make safety recommendations.

### Reporting

When deficiencies are noted during quarterly inspections, they are documented and reported to the manager of the department in which the safety hazard is located. When safety hazards are noted by non-scheduled observation, they must be reported by the observer to a supervisor. Hazard Reporting Forms are routed to the department, CSO, or the director best equipped to evaluate the concern and, when necessary, propose a resolution.

### Hazard Resolution

The primary purpose of facility inspections and hazard reporting is to identify conditions that could lead to accidents and losses. In view of this, it is crucial that all departments and employees be involved in the Facility Inspection and the Hazard Identification and Resolution processes. Hazard resolution is related to the severity of the hazard and the probability and severity of a negative consequence of the hazard.

### Follow-up

Corrective action for a confirmed hazard that has been identified by any established process is the responsibility of the manager of the department area in which the hazard exists, or the CSO. This includes arranging for the services of other Cherriots departments or outside parties, as necessary, to eliminate or control the hazard.

### Documentation

Hazards that have been identified, proposed resolutions, and corrective actions are recorded in hard copy by the Safety Committee and maintained by the CSO. All front-line personnel are responsible for monitoring safety and security as part of their respective positions. If a hazard is identified through observation or interaction with customers or the public, it is reported to the immediate supervisor as well as following Cherriots hazard reporting process.

## Employee Hazard Reporting

### Reporting Forms

Employees fill out a Hazard Reporting Form, which is turned into the affected department and the CSO, talk with a supervisor, and depending on the hazard, the Manager as well. They can also contact a Safety Committee member, which is composed of union and administrative members.

Depending on the severity/risk of the hazard identified, immediate action may be taken, or the input will be brought to the Safety Committee for discussion. Feedback will be provided to the employee on what action, if any, will be taken. All employees follow the Employee Hazard Reporting Program Policy.

### Route/Operations Safety

Employees can fill out a Hazard Reporting Form or discuss suggestions for making the system/route safer. Cherrits encourages employees to be advocates for safety while also suggesting methods of increasing performance. Management has an open-door policy and makes clear the importance of employee feedback: positive and negative.

## Safety Events

### Accident and Incident Reporting Process

All accidents and loss incidents are to be investigated. Cherrits safe driving standards require professional safe performance of all operators. To ensure better than average safety performance, Cherrits convenes an Accident Review/Determination Panel to determine if a collision or onboard incident could have been prevented. All personnel operating any Cherrits vehicle are held to this standard. The Safety and Loss Control Specialist will evaluate the circumstances of an occurrence and render a determination on whether the occurrence will be classified as an accident, or incident. The Specialist will coordinate all determinations with the CSO

The Salem Area Mass Transit District Operator's Manual includes procedures and responsibilities for accident/incident investigation. The combined manuals establish procedures for accident notification, response, and investigation.

### Accident Definition

An accident, by definition of the National Safety Council, is any occurrence that results in property damage and/or personal injury, regardless of who was injured, what property was damaged, to what extent, or where it occurred.

For the District's purposes, a vehicular accident is further defined as: vehicular contact with another object that results in any reported injury; any property damage other than to our vehicle; or any property damage to our vehicle that necessitates a repair.

*See Safety and Security Procedure 3011, Accident Review and Determination.*

### Reporting an Accident

Transit Operators are required to report all accidents to Dispatch immediately and complete an Accident Report no later than the end of his/her shift that day. The Accident Report must be filled out accurately and completely by the transit operator involved in the accident. The transit operator's signature confirms his/her agreement with the accurate contents of the report.

### What to Do at the Scene of an Accident

When involved in a vehicle accident, stop the bus as quickly as possible and do not move the bus. Report the accident to Dispatch immediately. Check for injuries and relay information to Dispatch. Do not move the bus until released by a police officer or an operations supervisor. If you feel it is necessary to move your bus, notify Dispatch and state your reason why.

Protect the scene – place emergency triangles in the proper configuration around your bus.

Begin the information exchange with the other driver. Use the proper District forms from your accident packet.

Distribute and collect courtesy cards, obtaining the names and phone numbers of customers on the bus or others outside the bus who may have witnessed the accident.

Anyone wanting to make a claim should be referred to the safety and loss control specialist or his/her designee in the District's Human Resources Department.

Do not make any statements describing the accident, how the accident occurred, or your opinion of fault to anyone, except the police, District supervisory personnel, and safety and loss control specialist, or his/her designee. Requests for information or questions about the accident are to be referred to supervisory personnel. All media requests for information are to be directed to the District's public information officer.

See General Administrative Manual Policy 203, Media Contacts.

### Accident Classification

All accidents will be given a determination of preventable or non-preventable. The National Safety Council has developed this brief definition:

"A preventable collision is one in which the driver failed to do everything that reasonably could have been done to avoid it."

In other words, when a driver commits errors and/or fails to react reasonably to the errors of others, the National Safety Council considers a collision to be preventable. When a driver commits no errors and reacts reasonably to the errors of others, the Council considers the collision to be non-preventable.

Accident reports are reviewed and, if necessary, further investigated. A determination as to the preventability is issued to the transit operator in writing. A preventable accident will prevent a



transit operator from receiving an annual National Safety Council Safe Driving Award.

Transportation coordinates with outside law enforcement agencies if they investigate an event. Administrative staff coordinates with outside insurance providers and provides support among Cherriot's departments and independent investigation to manage Cherriot's liability and claims.

Most accidents and incidents involving Cherriot's are relatively minor in severity and are investigated by Operations Field Supervision. Since most accidents involve buses, this section focuses on bus accidents. However, all non-bus accidents and incidents are also investigated.

### Investigation

An attempt is made to complete the investigation of most accidents within three days. Operations Supervisors are required to complete an Accident/Incident Report. Operators are required to complete an Accident Information Report. The Supervisor is required to file both reports electronically, as well as a hard copy and attach all relevant media for use by the Accident Review and Determination Panel and the CSO.

A Report of Injury Form must be completed if an employee suffers an injury or illness as a result of an accident or incident. An 801 Form must be filed if medical treatment is necessary.

### Accident Review Process

Accidents and incidents are classified as preventable or non-preventable.

Preventable accidents are defined as those accidents that could have been reasonably avoided if the operator had followed all defensive driving techniques as established by the National Safety Council Guidelines, and/or Cherriot's Transit Operations Procedures and Policies.

The Panel follows all policies, procedures, and definitions as in Safety and Security Procedure 3011, Accident Review and Determination. Examples of investigations may include reviews of accident and injury reports, vehicle condition reports, witness statements, employee interviews, accident scene sketches, bus videos, physical evidence, training manuals, and accident site visits. Employees who wish to appeal preventable determinations must notify the Safety and Loss Control Specialist in writing within 21 days of the date the employee was notified of the determination. At that time, the employee (or union representative) shall provide to the District's Safety and Loss Control Specialist all documents they wish the National Safety Council to consider. The Safety and Loss Control Specialist will submit these documents, along with the District's documentation, to the National Safety Council for their review and determination. The employee will receive a copy of all documents submitted. The National Safety Council's determination of the preventability or non-preventability of the accident is final and binding.

### Hazard Resolution

The primary purpose of the accident investigation process is to determine the cause(s) of

accidents so that they may be prevented or mitigated in the future. To this end, it is crucial that all relevant departments be appropriately involved in the process. A serious attempt is made to use lessons learned through the investigatory process to incorporate hazard resolutions into future procedures, designs, construction, modifications, training, and procurements.

#### Follow-up

Follow-up in the form of corrective action is the responsibility of the employee's direct supervisor or manager. The responsibility may be delegated to a designee, or the CSO.

Any disciplinary action will be assessed using the Collective Bargaining Agreement procedures and/or the Administrative Handbook. Disciplinary consequences for accidents may include warnings, suspensions, and discharge.

Training will be provided, in most cases, for employees who have been involved in two preventable accidents within one year. Training and re-training are not disciplinary in nature.

#### Internal Reporting

The employee's direct supervisor is responsible for ensuring that all accident reports are completed and filed.

#### Documentation

Management, the Safety and Loss Control Specialist, and the CSO maintain the accident investigation documentation.

#### Performance Measures

Through a series of performance measures relative to operations, maintenance, and safety, Cherriots can monitor the system's safety by identifying trends and gaps in policies, procedures, training, and monitoring efforts. The following performance measures are on a daily, monthly, and quarterly basis.

#### Maintenance

- **Preventive Maintenance On-time Inspection Percentage** – determines the effectiveness of the maintenance department to ensure all inspections are conducted per manufacturing and Cherriots mileage intervals.
- **Vehicles Removed From Revenue Service** – tracks vehicles removed from service due to a mechanical defect developed while in service requiring immediate service either on-site of failure, or once returned to the facility.
- **Annual Vehicle Condition Assessment** – through annual inspection, determines on a scale of 1-5 the overall condition of the asset. This performance measure is also used in annual updates of Cherriots Transit Asset Management Plan.

#### Transportation

- **Customer Complaints Per Month** – tracks all customer complaints to identify areas of

deficiency with vehicle, driver, or other Cherriots areas. Safety-related complaints are immediately routed to a supervisor on-duty or the CSO for investigation mitigation and response. Complaints may be a result of phone calls, website, or Cherriots public forums.

- **On-time Performance** – serves as an indicator to issues with time management, environmental factors, scheduling, and vehicle and driver performance.
- **On-board Surveys** – conducted annually, allow Cherriots to receive rider feedback about bus operator performance, customer service, and vehicle safety.

### Safety

- **Safety Performance Measure: Fatalities** (total number of reportable fatalities and rate per total vehicle revenue miles by mode)
- **Safety Performance Measure: Injuries** (total number of reportable injuries and rate per total vehicle revenue miles by mode)
- **Safety Performance Measure: Safety Events** (total number of reportable events and rate per total vehicle revenue miles by mode)
- **Safety Performance Measure: System Reliability** (mean distance between major mechanical failures by mode.)

### Safety Committee

The Safety committee was convened by a joint labor-management process and consist of an equal number of frontline employee representatives who represent a plurality of the frontline workforce. The purpose of the Safety Committee is to bring management, employees and employee representative together to achieve and maintain a safe, healthful workplace.

The Safety Committee shall have the responsibility for the following actions:

- Evaluate employee concerns about safety and security hazards;
- Assist in identifying and reporting hazards in the workplace;
- Review injury reports and provide recommendations to reduce recurrence
- Assist with workplace inspections;
- Address concerns and recommend mitigation;
- Provide management with information concerning safety and security hazards and provide recommendations for mitigation;
- Reduce recurrence of injuries to employees;
- Identify potential “hot spot” locations in the service area.

Additionally, the Safety Committee evaluates the effectiveness of the Bus system safety programs and activities and its implementation through the review of safety audits, major incident or accident investigations, and safety related statistics to reduce the potential for recurrence of similar incidents and negative trends. Major safety or security incidents include any incident that has potential for significant liability of Cherriots, results in significant, sustained, or unusual disruption of transit service, results in death or serious

injuries to persons on Cherriots premises or vehicles and/or has potential for high public/media.

## Section 7. Safety and Promotion

### Employee Selection

#### Hiring Practices

Selecting applicants best suited to excel at the Transit Operator, Dispatch, Supervisor, Maintenance job requirements, is critical to safe transit operations. The Transit Operator is directly responsible for the safety of not only the passengers, but also the pedestrians, bicyclists, drivers, and all others who share the road with the transit vehicle. Other Operations departments are instrumental in ensuring the Operator has a safe and reliable vehicle, clear and concise policies and procedures, effective communications, and proper training.

All safety-sensitive employees must meet Federal and State compliance requirements to be considered for a position with Cherriots. Cherriots hiring process is described thoroughly in the Section 320 of the SAMTD Personnel Policies.

### Training

There are formal training programs for Transit Operators, Maintenance employees, and Transportation employees. These include training classes, manuals, Cherriots Standard Operating Procedures, and on- the-job training. Training is provided by department manager and Training Supervisors in coordination with the Human Resources Department.

The safety component of training is designed to make employees aware of the hazards associated with their jobs and the appropriate methods for controlling these hazards. The training is intended to motivate employees to work safely. Trainings fall into three main categories: (1) Initial, (2) Periodic, and (3) Remedial, or Refresher.

#### Initial Bus Operator Training

New Bus Operators receive an intensive seven-week training course that covers every aspect of their new job. Some components of the training are delivered in the classroom. The majority of learning occurs on the buses during off-route and on-route training. The training includes, but is not limited to, the following areas:

- Traffic Technology Services Predictive Driving
- Orientation to Cherriots
- Basic Bus Maneuvers
- Advanced Bus Maneuvers
- Service Stops

- System Overview
- System Procedures
- Communication Skills
- Customer Service
- Accessible Service
- Emergency Management
- Fleet Services
- Personal Safety
- Health/Injury Prevention
- Stress Management
- CDL Preparation
- On-route Training
- Vehicle Orientation of all Vehicles
- Vehicle Security Awareness
- Conflict Resolution

On-route training provides real service experience, both day and night, with an Operator Instructor during the Instructor's regularly scheduled work. The time the new employee operates the revenue route is increased daily. Each day the student receives a full review and debriefing from his or her instructor. Instructors communicate among one another regarding where additional training for new operators is required. Student rotation among the Operator Instructor group provides each student with experience across a variety of routes, vehicles, times of day, instructional styles, and driving conditions.

After the initial training, new Bus Operators receive additional support and training, including:

- Check-rides at the following intervals: one week, three months, six months, nine months, and twelve months
- Four-week Follow-up: Procedure and Policy Review
- Fall Bad Weather: Driving and Defensive Driving Course (DDC)
- Refresher
- 90-Day: Mid-trial Performance Review
- One-year Follow-up: Debriefing with Operations Training Supervisor and safety review with Transportation Department Management and the CSO
- One Year Refresh: In-service Training
- Operators with at least two years of experience, and no accidents or discipline within the last year, may apply to become Training Instructors as positions become available.

All new Cherriots employees are subject to a trial period of six (6) months at which time a determination will be made to give career status, terminate employment, or returned to previous classification if a vacancy exists.

### Annual Training for All Bus Operators

Every year, each Bus Operator receives one full day of refresher and topical training. The training addresses, but is not limited to, the following topics:

- Safety and Customer Service
- Predictive Driving
- Signal and Intersection Management
- On the Road Exercise
- Effectively Dealing With People of Differing Ages
- Safety/Loss Control Topics – Blood Borne Pathogens
- ADA – Securement and Service Key Point Review
- Safety/Security Update

Partial-day trainings are also scheduled as needed and whenever warranted by the addition of new equipment or a change in configuration.

### Initial Operations Supervisor Training

Transit Operations Supervisors typically begin their career path as Bus Operators who first work alongside full-time supervisors in Dispatch and on-the-road. However, some individuals come into the position from diverse backgrounds. Subjects taught and subsequent testing is received as follows:

- Drug & Alcohol (Policy and procedures for all types of FTA-mandated testing)
- Accident Investigation
- Emergency Procedures
- Security Procedures
- On-the-job Injury Claims
- Blood Borne Pathogens
- Data Entry and Recordkeeping
- Harassment
- Cultural Diversity
- Coaching/Counseling/Discipline
- Dispatch Operations
- Field Operations
- First Aid and Defibrillator
- Basic Data Entry and Storage
- Examination and Filing of Bus Camera Video Evidence
- Conflict Resolution, De-escalation.
- In addition to their initial training, all Operations Supervisors will receive one full day of refresher and topical training annually via annual in-service training.

### Injury and Illness Prevention Training

Injury and Illness Prevention Training is directed toward achieving a safe working environment for all employees and reducing the chance of occupational-related injuries and illnesses. The

majority of training targets employees working in the Maintenance and Facilities Maintenance Departments because these employees have the greatest exposure to occupational hazards. The program is based on applicable Federal, State, and local safety codes and regulations. Some areas addressed in training include:

- Handling Hazardous Materials (Right to Know)
- Slips, Trips, and Falls
- Personal Protection Equipment
- Safety Data Sheets (SDS)
- First Aid
- Forklift Safety
- Blood Borne Pathogens
- Hazardous Materials Storage
- Strains and Sprains
- Fall Protection
- Crane Operation
- Ergonomics
- Hazard Communication Program

#### Emergency Response Planning and Coordination

Details are contained in the Cherrits Emergency Action Plan and Evacuation Request Procedures.

#### System Modification Design Review and Approval

##### General Process

The Cherrits bus system is regularly modified in response to operational experience, the addition of new types of service, and changes in service design and levels. Cherrits philosophy is to use appropriate new technologies to benefit the environment and the community it serves. The challenge is to review any proposed modification adequately before it is approved. Any proposed modification should be evaluated to ensure it is compatible with existing systems and does not introduce new hazards to the system or reduce the effectiveness of existing hazard controls.

Equipment modifications may be proposed by any employee of any department that uses the equipment. Changes may also occur from an analysis of reliability performance, historical data, and available improvements in equipment design and components.

##### Modification Design Review

A review of any modification in equipment design shall be made by the director and managers of the department responsible for the equipment. It is an informal practice to include Human Resources and Operations in the review of any change that might affect safety. The impact on the safety of all designs and specifications should be identified and

evaluated before the change is approved. Some of the areas to be considered include, but are not limited to:

- Hazardous Materials (handling and use)
- Motor Vehicle Safety
- Human Factor
- Occupational Health and Safety
- Materials Compatibility
- Fire Protection
- Lighting
- Braking Systems
- Mirrors
- Warning Devices

Modifications must not be made before it is determined how they might affect the safety of the system, or any other systems. Other departments may evaluate a proposed change to determine its compatibility with other systems (e.g., hoists, fueling systems, communications systems). The evaluation may also include a review of applicable regulations, such as the Federal Motor Vehicle Safety Standards and Regulations and the State of Oregon OSHA.

Testing may also be performed to evaluate the safety of a proposed modification. The testing of small changes may be minimal. For substantial modifications, extensive field testing, mock-ups, and structural evaluations may be employed.

#### Modification Design Approval

Final approval is generally made by the Deputy General Manager. When modifications are made by a bus manufacturer, the Maintenance Manager works with the manufacturer, and contractual changes may be made. If changes are substantial, additional training will be provided for maintenance and operation staff.

#### Monitoring

Once a modification is put in place, feedback from the operating department is solicited to evaluate the performance of the modification. Unsolicited input from the operating department and its employees (end users) is also encouraged. Depending on the nature of the modification, Human Resources and Planning and the Safety Committee, may be involved for input.

#### Procurement Process

Procurement of new systems such as facilities, equipment, and buses include safety requirements in specifications, design reviews, testing and configuration control. These procurements may trigger consultation with the project manager and safety committee to ensure basic system safety principles. Consideration is given to the following safety requirements:



- Compatible with the existing Cherrits system safety features, design, and procedures.
- Incorporate "fail-safe" principles when failures would cause a catastrophe resulting in injury to personnel, damage to equipment, or inadvertent operation of critical systems.
- Avoid, eliminate, or reduce identified safety hazards by design change, safety devices, and parts or materials selection. Composition of hydraulic fluids, lubricants, and other materials shall provide optimum safety characteristics and fire-resistant properties.
- Location of equipment components so that access by personnel during operation, maintenance, repair, or adjustment activities shall not require exposure to hazards such as electrical shocks, burns, cutting edges, sharp points or dangerous or toxic materials.
- Design to minimize severe damage to equipment or injury to personnel in the event of an accident.
- Avoid undue exposure to physiological and psychological stresses, which might cause errors leading to an accident.
- Provide suitable warning and cautionary notes in instruction for operation, assembly, maintenance and repair, and distinctive markings for personnel protection on hazardous components, equipment, and facilities.

Contractors who provide systems, sub-systems, equipment that affect safe transit operations or passenger or employee safety are required to establish and maintain a system safety program in accordance with an approved ASP. The contractor's approved ASP must define objectives, tasks, and procedures, schedules, and data submittals for the safety activities that will be performed by the contractor. The Chief Safety Officer approves the contractor's system safety program plans, with concurrence of the Safety department staff.

Additionally, all personal protective equipment to be used by Cherrits personnel are reviewed and approved by the Chief Safety Officer, Risk Administrator and Safety Coordinator in accordance with respiratory, hearing conservation, work at heights, lock out/tag out or other applicable safety standards. Chemicals and other potential hazardous materials being considered for purchase and use are also reviewed and approved by the abovementioned team prior to arrival on site.

### Documentation

The Maintenance Department is responsible for documenting any vehicle modifications. Facilities Services is responsible for documenting any modifications made to a facility. Documentation may involve changing diagrams, schematics, manuals, service bulletins, service intervals, standard operating procedures, and Safety Data Sheets. Maintenance Supervisors are responsible for updating Safety Data Sheets based on input from product manufacturers.

### Routes

Route modifications are designed by the Planning Department. Planning may use a current Bus Operator to test routing and bus stop placement. This experience-based, real-world process is designed to protect the safety of the transit bus, transit passengers, other vehicles, and

pedestrians.

The Planning Department informs the Service Excellence Team of any proposed route modifications. The Planning Department can request that the Committee evaluate a specific proposal, or the Committee can choose to evaluate any proposed modifications.

Transportation Management may request a route modification it believes will improve operations. It may also choose to evaluate a modification that has been proposed by another department. Input from individual Bus Operators is encouraged through the Hazard Reporting Form, direct communication, and periodic surveying of Operators conducted by Service Planners.

Finally, the Planning Department maintains a cooperative working relationship with the appropriate planning and road departments of all municipal levels of government within which Cherrlots operates.

## 8. Minimizing Spread of Infectious Diseases

### COVID Cases

Guidelines from the Centers for Disease Control and Prevention about masking, testing and isolation haven't changed much since the CDC last updated its recommendations in August 2022. But as the virus continues to spread, here's what the agency recommends in regards to masking, testing and isolation.

#### When to wear a mask

Since February, the CDC has based masking guidelines on three metrics: new Covid cases, hospital capacity and hospital admissions. Given that, the agency currently does not suggest masks for the majority of U.S. counties. You can check your county's risk level and see whether masks are needed using the CDC's online tool. Immunocompromised people and those in their households should wear masks if they live in counties with a medium risk level.

The District must comply with any State or Federal mandates imposed by governing bodies.

#### When to test

- Get tested immediately if you have symptoms or five full days after you were exposed to someone who tested positive.
- Consider testing if you've been in high-risk settings or before spending time around someone with a high risk of severe Covid, especially if your area has a medium or high risk level based on the CDC's metrics.

### If you have been around a person who has tested positive

- Wear a mask around others, regardless of your vaccination status.
- If symptoms appear, get a test as soon as possible. If you are symptom-free, take a test after five full days (the date of your exposure is considered day zero).
- The Food and Drug Administration recommends that people with a known exposure who test negative take a second test 48 hours later. If negative again, test a third time after another 48 hours. (The FDA does not offer guidance about whether to repeat tests if you don't have a known exposure, but the CDC notes that multiple negative tests can increase confidence in the result.)
- If you previously tested positive for Covid within 30 days or less of your exposure, you do not need to test unless you develop symptoms.
- Those who tested positive between 31 and 90 days before their exposure should take a rapid test — not a PCR test — regardless of whether they have symptoms. (PCR tests may stay positive for up to 12 weeks.)

### If you have COVID symptoms

- Isolate until you're able to get tested. If the test is negative, you can end your isolation, but the FDA recommends taking a second test 48 hours after the first.

### If you test positive

- Isolate for at least five days after your positive test (details about when to leave isolation can be found below).
- Wear a high-quality mask around others through day 10 unless you test negative on two rapid tests administered 48 hours apart. If you continue to test positive beyond day 10, the CDC recommends you continue masking.
- Avoid being around people who are at high risk of severe Covid until at least day 11.

## Other Infectious Diseases

Infectious diseases are illnesses caused by harmful organisms (pathogens) that get into your body from the outside. Pathogens that cause infectious diseases are viruses, bacteria, fungi, parasites and, rarely, prions. You can get infectious diseases from other people, bug bites and contaminated food, water or soil.

### Ways to prevent infectious diseases

- Vaccines and safe food handling habits, you can reduce your risk of coming down with or spreading an infectious disease with a few everyday practices.
- Wash your hands with soap and water. Thorough hand-washing is particularly important before preparing a meal or eating, after using the bathroom.
- Cover your nose and mouth when you sneeze or cough.
- Disinfect frequently touched surfaces in your home and workplace.

- Avoid contact with people who are sick with an infectious disease or sharing personal items with them.
- Avoid contact with others while you are sick with an infectious disease.
- Wear a mask around others when you are sick or as recommended by the CDC.

### General Workforce Considerations

The Chief Safety Officer, Safety Coordinator and Risk Administrator will be responsible for responding to pandemic concerns. This information will be share through communication channels identified in other parts of this document. Additionally, a small team of 3 to 4 staff members, will track and monitor health and safety data from federal, state, and county health authorities. This team will make recommendations to the Executive Leadership Team for the appropriate course of action should an exposure to a virus occurs.

Staff will continually educate employees and riders on how to manage and mitigate pandemic risks. Cherriots will communicate and reinforce new policies and procedures as they are developed by the following:

- Establish a distribution of memos addressing recent changes in policy and direction for the agency.
- ELT to hold daily briefings to stay informed of current circumstances and continually evaluate effectiveness of current actions.
- Hold weekly GM Roundtables to brief all staff and address questions.
- Utilize social media, district website, and posted notices (electronic and printed) to keep the public informed of the most recent changes.
- Conduct periodic after action reviews (AAR) to evaluate current processes and make adjustments as deemed necessary.
- Provide a supply disinfecting wipes or disinfecting cleaner and paper towels in locations easily accessible to all employees as needed. Ensure that all extended term contractors are doing the same.
- “No touch” water bottle fill stations to remain active. Drinking fountains should be turned off or marked out-of-service.

### Cleaning and Disinfecting of Surfaces

The Safety team, in cooperating with the Safety Committee shall develop protocol for cleaning and disinfecting areas, equipment, surfaces, and vehicles after a person infected with the pandemic virus was known to be in one or more of these types of spaces.

- Procedures: When possible, open all doors and windows to increase air circulation in the area. Wait 24 hours or as long as practical before beginning cleaning and disinfection. Cleaning staff should clean and disinfect all areas such as offices, bathrooms, common areas, shared electronic equipment (like tablets, touch screens, keyboards, and remote controls) used by the ill persons, focusing especially on frequently touched surfaces. Wear disposable gloves when cleaning and disinfecting surfaces. Gloves should be

discarded after each cleaning. If reusable gloves are used, those gloves should be dedicated for cleaning and disinfection of surfaces contaminated with the pandemic virus and should not be used for other purposes. Consult the manufacturer's instructions for cleaning and disinfection products used. Clean hands immediately after gloves are removed.

- (Non-porous) Surfaces: For hard non-porous surfaces within the interior of the vehicle such as hard seats, arm rests, door handles, seat belt buckles, light and air controls, doors and windows, and grab handles, clean with detergent or soap and water if the surfaces are visibly dirty, prior to disinfectant application.
- Soft (porous) Surfaces: For soft or porous surfaces such as fabric seats, remove any visible contamination, if present, and clean with appropriate cleaners indicated for use on these surfaces. After cleaning, use products that are EPA approved for use against the virus and that are suitable for porous surfaces.
- Electronic Surfaces: For frequently touched electronic surfaces, such as tablets or touch screens used in the vehicle, remove visible dirt, then disinfect following the manufacturer's instructions for all cleaning and disinfection products. If no manufacturer guidance is available, consider the use of alcohol-based wipes or sprays containing at least 70% alcohol to disinfect. Follow manufacturer's instructions for all cleaning and disinfection products for (concentration, application method and contact time, etc.) household disinfectants should be effective.
- Cleaning Hygiene: Gloves and any other disposable PPE used for cleaning and disinfecting the vehicle should be removed and disposed of after cleaning; wash hands immediately after removal of gloves and PPE with soap and water for at least 20 seconds, or use an alcohol-based hand sanitizer with at least 60% alcohol if soap and water are not available. If a disposable gown was not worn, work uniforms/clothes worn during cleaning and disinfecting should be laundered afterwards using the warmest appropriate water setting and dry items completely. Wash hands after handling laundry.
- Precautions: Wear skin protection and consider eye protection for potential splash hazards. Ensure adequate ventilation. Use no more than the amount recommended on the label. Use water at room temperature for dilution (unless stated otherwise on the label). Avoid mixing chemical products. Label diluted cleaning solutions. Store and use chemicals out of the reach of children and pets. You should never eat, drink, breathe or inject these products into your body or apply directly to your skin as they can cause serious harm.
- Regularly clean/disinfect facilities and stations; clean/disinfect daily for high traffic areas if resources permit. Clean/Disinfect frequently touched surfaces throughout daily operations such as: elevator and exit buttons, handrails, grab bars, seats/benches, garbage cans, doorknobs, and call boxes.
- Include materials and instructions to wipe down (at least 70% alcohol) desk, keyboard, mouse, telephone, microphone, and other frequently touched surfaces at the beginning and end of each shift.
- All revenue vehicles to be sanitized after each trip or at specified intervals as recommended by Oregon Health Authority. Every vehicle is sanitized during the evening fueling procedures. Operators have access to wipes for steering wheels and controls.

- Contractor(s) providing service will sanitize Regional vehicles at the Downtown Transit Center and at the other end of the routes. Contractor(s) are also sanitizing Regional shelters throughout the day.
- LIFT operators are sanitizing after the last customer.
- All non-revenue vehicles have been supplied with sanitizing wipes.
- Continue investment in operator barriers and other tools to ensure a reduction in spread of diseases.
- Communication will continuously update and produce education campaign materials for internal and external customers from early on.

### Additional Information

Safety and Security of the Oregon Public Transportation Plan (OPTP) aligns with the key components of the Federal Transit Administration's Safety Management System (SMS) principles in the Public Transportation Safety Action Plans. Goal 6 of the OPTP and SMS principles extend safety and security beyond vehicles and stations and include transit personnel, riders and the surrounding community. Safety is a basic expectation of all public transportation users and providers. Both the OPTP Goal 6 policies and strategies and the SMS principles encourage greater safety of the public transportation system through a range of strategies that proactively address design factors, personnel training, use of safety technologies, accident investigation and emergency management planning. The OPTP Goal 6 policies and strategies and SMS principles are scalable and effective across a broad range of organizations and applications. The goal of the OPTP and SMS is to ensure the agency has an inclusive and effective process to direct resources to optimally manage safety.

This PTASP was developed from information in other Cherriots documents, policies and procedures, and manuals. Those documents are listed below:

- SAMTD Personnel Policies
- Onboarding Checklists
- Transit Operator Handbook
- Safety and Security Plans, Policies, and Procedures
- General Administration Policies and Procedures
- Pandemic Response and Recovery Plan

## Appendix A

## HAZARD REPORTING FORM

Reporting Employee					Report #	
Date of Report						
Time of Hazard				Time Report Submitted		
Location of Hazard				Route/Manifest		
Supervisor Notified						
(Check all that apply)						
<b>Type of Hazard</b>						
Vehicle		Weather Related				
Passenger		Road Condition				
Facility		Security				
Employee		Near Miss				
<b>Description of Hazard</b>						
<b>Initial Action Taken to Mitigate Hazard</b>						
<b>Initial Assessment of Hazard</b>						
	Level 1 - Immediate: A deficiency, threat, or hazard requiring immediate attention to mitigate risk either temporarily until further action can be taken or complete mitigation.					
	Level 2 - Short Term: Action is needed within seven days to mitigate an identified deficiency, threat, or hazard. The deficiency, threat, or hazard does not pose immediate danger, but if no action is taken could elevate to an Immediate level risk.					
	Level 3 - Long Term: A deficiency, threat or hazard has been identified but does not pose a threat currently, but could at a later time. Continued monitoring and awareness are required.					
<b>Likelihood of re-occurrence of this hazard (1-10)</b>						
Received by: _____				Date/Time _____/_____/_____		



## HAZARD MITIGATION

Investigating Supervisor				Title		
Date of Investigation				Time		
<b>Additional Information</b>						
<b>Assessment Classification (Circle)</b>		Level 1	Level 2	Level 3		
					Report #	
<b>Mitigation Action(s) Taken</b>						
Action(s) Designed to:		Eliminate	Control	(Circle one)		
<b>Describe Communication of Action(s)</b>						
<b>Follow-up</b>						
Date		Contact				
<b>Status of Action Taken</b>						
Is additional action needed?		YES	NO			
<b>Additional Action Taken</b>						

## HAZARD CLASSIFICATION

						Report #	
Category of Hazard							
<b>Vehicle</b>			<b>Passenger</b>				
Mechanical			Behavior				
Performance			Weapon				
Interior			Suspended from svc.				
Exterior			Medical Emergency				
Towed			Injury				
Repaired on scene			Death				
Safety equipment			Mobility Devise				
Lift/Ramp/Securemt							
See Pre-Trip							
<b>Facility</b>			<b>Facility</b>				
Safety Equipment			Shelter				
Security Systems			Fueling				
Plumbing			Hazardous Materials				
Electrical			Fencing/Gate				
Foundation			Passenger Amenities				
Parking							
Equipment			<b>Employee</b>				
HVAC/Heat			Behavior				
Roof			Theft				
Storage			Endangering Others				
Computer/Data			Property Abuse				
Farebox/Vault			Illegal Activity				
						Chief Safety Officer Initials	



**To:** Board of Directors

**From:** Steve Dickey, Director of Technology and Program Management

**Thru:** Allan Pollock, General Manager

**Date:** December 15, 2022

**Subject:** Contract Award for Architectural Services for Multiple Projects

---

## ISSUE

Shall the Board authorize the General Manager to execute a contract with GLAS Architects, LLC, for the provision of architectural services, and approve an overall project budget of \$299,450, which includes a contingency of approximately 25%?

## BACKGROUND AND FINDINGS

Cherriots has several projects either scheduled or planned over the next seven years that may need to have architectural services available to support the project. These projects include:

- Del Webb perimeter fence, automated gates, and security enhancements.
- New Maintenance Supervisor's office.
- East Salem/Chemeketa Community College Transit Center
- New comprehensive District, Administration, Operations, and Maintenance Facility Study.
- Ancillary architectural services for small projects initiated during the term of the contract.

On August 9, 2022 a Request for Proposals (RFP) was released seeking proposals to provide these services. The deadline for proposals was September 14, 2022 and two proposals were received. One from Merryman Barnes Architects, Inc., and one from GLAS Architects, LLC. These proposals were reviewed by District Procurement staff for responsiveness, and then the Source Evaluation Committee (SEC) reviewed the proposals, conducted interviews with both firms, and scored the proposals based on the information in the proposals, responses to clarifying questions, and the interviews.

These proposals were evaluated on a qualifications basis only, as is required by Federal Transit Administration (FTA) under the guidance of the Brooks Act. Both firms were highly qualified. After a thorough process the SEC selected GLAS Architects, LLC as the apparent winner of the contract.

Upon completion of this process, the cost proposal was reviewed by Procurement staff to determine if the cost proposal was considered fair and reasonable in the current market for like services. The not to exceed amount requested includes a 25% contingency to account for the current instability of market prices for goods and services.

### **FINANCIAL IMPACT**

The expenses associated with this contract will be tied directly to the various budgets of the projects these services will support. The annual capital budget approved as part of the overall district budget will provide funding for these services as they relate to the various projects.

### **RECOMMENDATION**

Staff recommends that the Board authorize the General Manager to execute a contract with GLAS Architects, LLC, for the provision of general engineering services, and approve an overall project budget of \$299,450, which includes a contingency of approximately 25%.

### **PROPOSED MOTION**

**I move that the Board authorize the General Manager to execute a contract with GLAS Architects, LLC, for the provision of general engineering services, and approve an overall project budget of \$299,450.**



**To:** Board of Directors

**From:** Ted Stonecliffe, Transit Planner II, Programs  
Chris French, Service Planning Manager

**Thru:** Allan Pollock, General Manager

**Date:** December 15, 2022

**Subject:** Adoption of 2043 Long Range Transit Plan (LRTP)

---

## ISSUE

Shall the Board adopt the 2043 Long Range Transit Plan (LRTP) as provided in **Attachment A**?

## BACKGROUND AND FINDINGS

The 2043 LRTP will be a comprehensive long-range (20-year) planning document that provides a road map for transit and other mobility options in the District's service area (local and regional). District staff have been working with Jacobs Engineering Group, Inc., since the fall of 2021, and Jacobs has revised the draft of the document incorporating final comments from the project's Technical Advisory Committee, Citizens Advisory Committee, staff, and the board itself. This final copy is now presented to the board for adoption.

Some of the changes incorporated into the draft include:

- An Executive Summary was added to the document.
- Graphics and maps were revised to reflect a more general audience.
- Clarification of financial projection uncertainties and the schedule for updating this document with a financial forecast within the next 12 months.

Staff and a consultant team developed this plan with a high degree of involvement from the public, internal staff, and external stakeholders. Transparency of the planning process is key for public engagement so that our key stakeholders, including historically marginalized and disadvantaged communities, were consulted in the process of

developing the document and, in turn, Cherriot's service. We are happy to say that the outreach performed was highly successful in engaging these communities, despite the challenges of a pandemic and low ridership numbers.

The next 20 years is forecast to see many changes in population and employment in the Salem-Keizer region as well as the outlying rural areas of Marion and Polk counties. The Long Range Transit Plan creates a shared understanding about where we are today and what opportunities and challenges we will consider over the next 20 years. The LRTP identifies and communicates 20-year strategies to maintain and grow a regional public transportation system that enhances our community with equitable and inclusive transportation options. The plan aims to clearly describe the District's role in the region, sets priorities for future service, and will help deliver our mission of Creating Community Connections.

This document will be used by the many jurisdictions we serve in Marion and Polk counties to plan transit at the local level, but also by those that we do not yet serve, in order to identify needs and plan public transit services.

Staying consistent and compatible with local, regional, and state plans, such as transportation plans and climate action plans, is an important goal for the Long Range Transit Plan. Additionally, as the community develops, and changes to the transit network are made, the Long Range Transit Plan will be revised with a comprehensive review including public outreach every five (5) years.

## **FINANCIAL IMPACT**

There is no financial impact associated with the adoption of the LRTP document.

## **RECOMMENDATION**

Staff recommends that the Board adopt the Long Range Transit Plan as provided in **Attachment A**.

## **PROPOSED MOTION**

I move that the Board adopt the Long Range Transit Plan as provided in **Attachment A**.



# LONG RANGE TRANSIT PLAN

*December 2022*

## Acknowledgements

The production of the Cherriots Long Range Transit Plan has been the collective effort of the following people and organizations:

### Cherriots Board of Directors

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Ramiro Navarro Jr., Subdistrict 2  
Sadie Carney, Subdistrict 3  
Maria Hinojos Pressey, Subdistrict 4  
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Sara Duncan, Subdistrict 6  
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Ted Stonecliffe, Transit Planner II and Deputy Project Manager  
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David Trimble, Deputy General Manager

### Organizations and communities

Blindskills, Inc.  
CaPES McKay Community Partnership Team  
Chemeketa Community College  
Cherriots Citizens Advisory Committee

Edgewater Community Partnership Team  
Kaiser Permanente  
Keizer United  
Linn Benton Community College  
Mano a Mano  
Marion County Intellectual and Developmental Disabilities Services  
Micronesia Islander Community  
Northgate Community Partnership Team  
Northwest Senior and Disability Services  
Oregon Commission for the Blind  
Salem for Refugees  
Salem Health  
Salem-Keizer Area Transportation Study (SKATS) Technical Advisory Committee

### Technical advisory committee

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Tory Banford, Urban Development Planner at City of Salem  
Fred Evander, City Planner at City of Independence  
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Kevin Hottmann, City Traffic Engineer at City of Salem  
Ray Jackson, Senior Planner at Salem-Keizer Area Transportation Study  
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Bill Lawyer, Public Works Director at City of Keizer  
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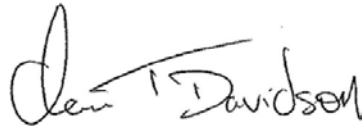
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Brandy Steffen, Consultant Public Engagement Support



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# Letter from General Manager and Board President



It is a pleasure to present the first long-range planning document for the Salem Area Mass Transit District (SAMTD), better known as Cherriots. Staff and a consultant team have been working to develop this plan with a high degree of involvement with the public. Transparency of the planning process is key for public engagement so that our key stakeholders, including historically marginalized and disadvantaged communities are consulted in the process of developing the document. We are happy to say that the outreach performed was highly successful in engaging these communities, despite the challenges of a pandemic and low ridership numbers.

The next 20 years is forecast to see many changes in population and employment in the Salem-Keizer region as well as the outlying rural areas of Marion and Polk counties. The Cherriots Long Range Transit Plan creates a shared understanding about where we are today and what opportunities and challenges we will consider during the next 20 years.

The Long Range Transit Plan identifies and communicates Cherriots 20-year strategies to maintain and grow a regional public transportation system that enhances our community. The plan clearly describes the District's role in the region and sets priorities for future service. This document will be used by the many jurisdictions we serve in Marion and Polk counties to plan transit at the local level, but also by those that we do not yet serve, in order to identify needs and plan public transit services.

Cherriots Vision, Mission, and Values were recently revised in the 2022 version of the Cherriots Strategic Plan. These are integrated throughout the Long Range Transit Plan in order to ensure consistency with the District's long-term goals and objectives.

**Vision** We deliver valued mobility options that inspire community pride.

**Mission** Creating community connections.

**Values** Communication, Humility, Excellence, Respect, Resourceful, Inclusive, Ownership, Transparency, Safety

Staying consistent and compatible with local, regional, and state plans such as transportation plans and climate action plans, is an important goal for the Long Range Transit Plan. Additionally, as changes to the community take place, it will need to adapt to such things as new developments, changes to the transit network, and new technologies. Therefore, updates to the Long Range Transit Plan will take place as needed.

Cherriots looks forward to seeing how the Long Range Transit Plan will shape, and be shaped by, the future of our community.

*Best regards,*

Ian Davidson, President, SAMTD Board of Directors  
Allan Pollock, General Manager, SAMTD





# Executive Summary

A strong public transit system is the backbone of an environmentally friendly and economically thriving community. The Long Range Transit Plan will deliver valued mobility options that inspire community pride. The Cherriots Long Range Transit Plan supports this by describing where Cherriots will go in 5-, 10-, and 20-year timeframes. Cherriots is committed to delivering valued mobility options that inspire community pride. We are guided by nine key values: communication, humility, excellence, respect, resourcefulness, inclusivity, ownership, transparency, and safety.

The long range planning process occurred from September 2021 to December 2022. The plan was built around inclusive public engagement activities, with technical analysis and research supporting the investigations into how Cherriots must adapt and grow.

The Long Range Transit Plan includes background and technical documents describing work completed during the 16-month planning process. These are available as appendices and include the Plan Review, Snapshot Existing Conditions Report, Scenario Evaluation and Strategy Development Report, and two Public Engagement Summaries.

## Vision, mission, values

The Cherriots 20-year strategies in this plan set priorities for future service based on Cherriots vision, mission, and values. The Cherriots Long Range Transit Plan follows the agency's guiding principles that also guide the Strategic Plan.

- Vision** We deliver valued mobility options that inspire community pride
- Mission** Creating Community Connections
- Values** Communication, Humility, Excellence, Respect, Resourceful, Inclusive, Ownership, Transparency, Safety

## Cherriots planning process

This is Cherriots first Long Range Transit Plan but not the first time Cherriots has looked to the future. Other plans and documents guiding Cherriots development and growth include the Strategic Plan, Comprehensive System Analysis, and Metropolitan Transportation Plan, as well as contributions to city and county transportation system plans. For more information on the near-term service planning process, see the Cherriots Strategic Plan.

### Related planning processes over time

Plan	Update years		
	1 - 2	2 - 5	5 - 10
<b>Cherriots</b>			
Strategic Plan	●		
Service Plans	●		
Diversity, Equity, and Inclusion Plan		●	
Coordinated Public Transit Human Services Plan		●	
Long Range Transit Plan			●
Climate Action Plan			●
<b>Partner Agencies</b>			
SKATS Metropolitan Transportation Plan		●	
Local Comprehensive Plans		●	
Local Transportation System Plans			●
Local Climate Action Plans			●
Oregon Public Transportation Plan			●

\* SKATS = Salem-Keizer Area Transportation Study

# Public engagement

The Long Range Transit Plan was supported by a public engagement process that engaged community members to listen and learn about priority needs, inform us about their long range service priorities, and explore ideas and tradeoffs in developing an implementable public transportation plan. Public outreach activities occurred online and in person through the online survey, online open house, virtual workshop, stakeholder interviews, community presentations, outreach talking points and flyers, mailings, flyers posted on buses, and tabling events. The project had two public engagement phases:

**Phase 1:** Winter 2021 when we asked people within the communities to share their priorities and values for the future of the transit system and their unmet needs.

**Phase 2:** Summer 2022 when we asked community members about transit strategies and alternatives to understand what works best for them and what else was needed.

The project team identified leaders within organizations that represented:

- Older adults
- People experiencing physical, intellectual, or developmental disabilities and visual impairments
- Refugees
- People of color
- Low income
- Students in elementary, middle, and high school, as well as local college students

Table E1 shows the themes that were identified through interviews, presentations, and conversations with the public through both public engagement phases.

**Table E1. Public engagement themes identified from the engagement phases**

<b>Increase in frequency:</b> Frequency increases were preferred over geographic coverage increases .
<b>Affordability of fares:</b> It is especially important for college students and caregivers.
<b>Technology is important:</b> Although crucial for younger people, the older demographic has become technology savvy following the pandemic. Technology options selected include real-time schedule information, app-based fares, and digital kiosks.
<b>Interest in vanpools:</b> There is community interest in vanpools, especially if they serve people who are acquainted and comfortable with each other.
<b>Flexible transit:</b> An on-demand bus service serving different zones was one of the top choices as an option for Cherriots to explore further.
<b>Same-day service:</b> Desired for paratransit riders, people with urgent medical appointments, and especially compelling for people who are blind or visually impaired, and for people with disabilities.
<b>Transit reliability in rural areas:</b> Important because many people live outside Salem where housing is more affordable and therefore need a way to and from Salem.
<b>Education campaign:</b> Improving education campaigns about how to find and use bus schedules, also at the high school level.
<b>Bus Stop accessibility:</b> Elements are required to increase accessibility such as street lighting and sidewalks (bus riders are pedestrians too).
<b>First and last mile service:</b> Needed for those who cannot reach a bus route that is a little too far to walk to.
<b>Diverse information media and languages:</b> Reach the Latinx community through Spanish media and TV, and Pacific Islander and Asian communities via flyers posted in Asian markets (languages: Chuukese, Marshallese, Pohnpeian, Palauan).



## Future services

The Long Range Transit Plan strategies describe Cherriotics investments to meet the District's vision, mission, values, and strategic priorities, working in coordination to deliver responsive, reliable, and safe transit. There are six top strategies that define the way Cherriotics will embark on this 20-year journey. All service changes will align with the Cherriotics Title VI program and follow public hearing requirements.

The strategies in this chapter are organized into six categories representing service or investment types. Each section describes policies, services, and infrastructure investments to address rider needs and improve transportation in and connecting the region. See the full Long Range Transit Plan for specific short-, medium- and long-term strategies.

### L RTP TOP MESSAGES AND STRATEGIES



**Meeting commitments to existing service goals.** One short to medium-term (1-10 years) Cherriotics priority is to expand both weekday and weekend service levels to meet goals for the Core Network and other routes. Cherriotics is still building on commitments to offer a baseline of bus service across the local and regional networks. Cherriotics will prioritize meeting policies set for the Core Network, Cherriotics Local and Cherriotics Regional routes, seven days per week.



**Adding service frequency and reliability to Cherriotics Local and Regional routes.** Cherriotics heard clearly in the public engagement conducted for the Long Range Transit Plan that new and future riders want to see more bus frequency on existing routes. This can include transit enhancements that help keep buses on-time and ensure access to services, jobs, and people across the region. Cherriotics will pursue these and other strategies to meet this need.



**Building Cherriotics into a Mobility Integrator.** Cherriotics is a trusted provider of transportation services and will look for opportunities to leverage its expertise to work towards offering options such as flexible routes and micro-transit, while building partnerships for emerging mobility such as bike share. Growing into a mobility integrator means staying informed of the travel needs and opportunities that are constantly changing in the communities we serve.



**Enhancing bus stops and transit centers.** The quality of amenities at Cherriotics bus stops and transit centers represent key gateways to opportunity. Cherriotics will make bus stops and mobility hubs that are safe, accessible, and with links to a variety of transportation options a key focus of this strategy.



**Building partnerships with local jurisdictions for service expansion and land use integration.** Cherriotics will continue to work in partnership with cities and counties to provide transportation services as our communities grow. Cherriotics will balance investments in new service areas while balancing capital and operating resources.



**Becoming a leader in environmental sustainability through clean transportation choices.** Cherriotics has started a zero emissions journey with groundbreaking investments in electric buses. Cherriotics will seek out and capture future opportunities to preserve and improve our environment.

### Transit network

- Add Local service: Increase service frequency to meet service goals and beyond, add service hours to meet travel trends, and extend route coverage
- Develop and implement High-capacity transit operational and capital strategies to improve Core Network speed and reliability
- Expand regional mobility including added service and new routes
- Identify and serve new service areas across the Local and Regional networks.

### Bus stops and transit centers

- Develop a bus stop typology to design, identify amenities and prioritize improvements for standard bus stop, superstop bus stops, transit mobility hub, and transit centers.
- Implement new stops to improve access and connections for bus riders.

### Customer information and fares

- Complete implementation of e-fare program, including actions to protect customer data.
- Identify opportunities to expand reduced fares to other groups.
- Monitor the adoption of e-fare payment by seniors, people with disabilities, low-income riders, and ethnic minority riders, including from a Title VI perspective.
- Identify opportunities to reduce barriers to use of new trip planning and fare payment technologies for low-income riders.
- Look for opportunities to extend e-fare payment to new and existing services and explore new technologies that make fare payment easier for customers.
- Leverage data collected from e-fare payment to inform service plan and fare updates.

### Flexible mobility

- Look for opportunities to use flexible mobility to provide first- and last-mile connections for riders who are traveling throughout the region.
- Establish clear standards for the performance of on-demand and flex-route transit to guide future implementation.
- Incorporate flex routes, ride hailing partnerships, and expanded vanpools into scenarios during future updates of the Long Range Transit Plan.

- Look for opportunities to expand on-bus bicycle capacity as existing vehicles are replaced.
- Work with service providers to integrate new mobility options into Cherrlots e-fare payment and trip planning systems.

### Transportation options

- Complete the Transportation Options strategic plan to meet the needs of travelers in Marion, Yamhill, and Polk Counties.
- Partner with new multifamily housing developments close to the Salem Downtown Transit Center to provide information and encouragement for walking, biking, carpooling, and transit use.
- Pilot a residential Group Pass Program with one or more new housing developments.
- Expand vanpool programming to manufacturing and agricultural employers.
- Expand the Group Pass Program to partners in housing developments, colleges, and universities.
- Expand program activities to promote bicycle riding and provide training.
- Leverage alignment with local Climate Action Plans and business and community sustainability priorities to increase shared mobility options in the region.

### Vehicles

- Replace the current renewable diesel (R-99) fleet with zero-emissions buses.
- Prioritize ongoing training for Cherrlots maintenance and transportation staff to maintain and operate an increasingly zero-emissions fleet.
- Continue to expand capacity for electric buses through additional depot and on-route chargers.
- Investigate and study new opportunities as zero-emissions and other technologies advance and become more widely available.
- Cherrlots will continue its focus on reducing emissions and improving the local environment by focusing on battery electric buses and infrastructure, and pursuing new and innovative technologies that lower Cherrlots reliance on fossil fuels.

# Chapter 1. What is the Long Range Transit Plan?

A strong public transit system is the backbone of an environmentally friendly and economically thriving community. The Long Range Transit Plan will deliver valued mobility options that inspire community pride. The Cherriots Long Range Transit Plan supports this by describing where Cherriots will go in 5-, 10-, and 20-year timeframes. Cherriots is committed to delivering valued mobility options that inspire community pride. We are guided by nine key values: communication, humility, excellence, respect, resourcefulness, inclusivity, ownership, transparency, and safety.

The long range planning process occurred from September 2021 to December 2022. The plan was built around inclusive public engagement activities, with technical analysis and research supporting the investigations into how Cherriots must adapt and grow.

The Long Range Transit Plan includes background and technical documents describing work completed during the 16-month planning process. These are available as appendices and include the Plan Review, Snapshot Existing Conditions Report, Scenario Evaluation and Strategy Development Report, and two Public Engagement Summaries.

## Background and context

Cherriots public transit serves the needs of a wide range of people, including those getting to medical appointments, accessing food, commuting to a work place, returning home after a late shift, meeting friends, or attending university classes on time. Our needs change day-to-day and over time, as does the way we prefer to get to places. What matters is providing access to opportunities that make our lives more connected, fulfilling, and healthy.

Transit is an essential part of how communities in the Salem-Keizer region thrive and meet their shared goals. It is a priority resource in transportation systems that provide affordable mobility, reduce greenhouse gas emissions, ease traffic congestion, and offer ways to reduce space devoted to parking.







**When  
transit  
reflects**

*communication  
humility  
excellence  
respect  
resourcefulness  
inclusivity  
ownership  
transparency  
safety*



**Riders get**

*Lifelong mobility  
Physical access  
Comfort  
Options to meet needs  
Feeling safe and secure  
Information and  
engagement*



**And more  
people  
have  
access to**

*Family and friends  
Lifelong health  
Education and learning  
Business and jobs  
Livable neighborhoods  
Clean air*

Cherriots is an integral part of local communities that look to transit and shared mobility to fulfill the goals they are working hard to achieve.

## Trends

Cherriots is a transportation network that will evolve and adapt with our communities. Cherriots identified and considered needs and opportunities affecting the District today, and likely to affect customer expectations and the District’s path during the next 20 years. The following sections list several trends likely to affect how Cherriots will grow in the future.

### Public health

The COVID-19 pandemic affected transit use and operations across the United States, and Cherriots was no exception. Ridership on Cherriots buses fell by more than 90% during the spring of 2020. Some people lost jobs, while others shifted to working from home for some or every shift. Still others, especially Cherriots riders, needed to get to work in essential industries like health care, shipping and delivery, education, retail, agriculture, manufacturing, and the food industry. Cherriots suspended fares for 16 months after March 2020 to ensure a decrease of touch points for both riders and Team Cherriots members in order to decrease the spread of COVID-19, disinfected vehicles more often, and made room for physical distancing. These measures provided valuable lessons for operations, and in the long term Cherriots will need strategies to adapt quickly and effectively to further disruptions and the resulting impacts.

### Staffing

Hiring and retaining transit operators has been a perennial challenge for transit providers. The pandemic has made this an even greater challenge. Cherriots and transit agencies across the country have reduced transit service due to staffing shortages. Over the long term, transit providers will likely need to attract skilled drivers with increased wages and benefits, safety measures, training, and other investments to maintain a skilled and essential workforce.

### Equity and access

Cherriots surveys riders, social service providers, and the general public on a regular basis through needs assessments and other plans. A consistent theme is the need for affordable and accessible transportation choices, for which transit is an effective solution. Cherriots riders are more likely to live in low-income households, speak languages other than English at home, and identify with historically disadvantaged groups, which are populations shown to closely align with essential workers. Cherriots transit and paratransit services are an essential resource for older adults, which is a population that continues to grow across the region. Cherriots must work to connect with all parts of our communities to deliver solutions most important to those most in need.

### Safety and security

One of the Cherriots nine values is safety. Safety for public transportation includes accessible paths of travel to and from transit facilities as well as inviting and comfortable spaces while waiting for and riding in the bus. Cherriots must also be a trusted service provider of transportation—maintaining vehicles and training drivers—while creating safe and inviting public spaces. Looking ahead, Cherriots must understand and address what makes people feel safe and secure to create long-term livability.

### Technology and mobility

Advances in transportation technology are rapid and have affected transportation in positive and negative ways during the past decade. For the long term, Cherriots and its partner local agencies must prepare to capture opportunities while remaining focused on the vision, mission, and values. Growing the role of mobility manager for the Salem-Keizer region is one way to organize around these changes. Cities look to public transportation to help address climate and equity goals because agencies like Cherriots offer expertise in service delivery and management. Technology offers many ways to coordinate services, engage stakeholders, receive feedback, provide new mobility services, and coordinate regional payment systems for transit, parking, and other shared mobility products.

## Vision, mission, and values

The Cherriots 20-year strategies in this plan set priorities for future service based on Cherriots vision, mission, and values. The Cherriots Long Range Transit Plan follows the agency's guiding principles that also guide the Strategic Plan.

- Vision** We deliver valued mobility options that inspire community pride.
- Mission** Creating Community Connections.
- Values** Communication, Humility, Excellence, Respect, Resourceful, Inclusive, Ownership, Transparency, Safety.

**Table 1. Cherriots values**

<b>C</b>	<b>Communication</b>	I promote an open, respectful dialogue with our customers, community partners, and my teammates.
<b>H</b>	<b>Humility</b>	I will serve others with compassion and empathy.
<b>E</b>	<b>Excellence</b>	I will deliver a world class customer experience.
<b>R</b>	<b>Respect</b>	I will honor my team and community with my words, actions, and behaviors.
<b>R</b>	<b>Resourceful</b>	I will adapt to find efficient and innovative ways to overcome challenges and be willing to take initiative to achieve success.
<b>I</b>	<b>Inclusive</b>	I recognize and honor diversity and will act with integrity, promoting decisions and actions that are equitable and align with being an inclusive agency.
<b>O</b>	<b>Ownership</b>	I am empowered to take actions that contribute to good stewardship and community trust.
<b>T</b>	<b>Transparency</b>	I invite trust by fostering honesty and credibility in the eyes of others.
<b>S</b>	<b>Safety</b>	I own my role in ensuring Cherriots provides a safe, clean, and secure experience.

The Cherriots Strategic Plan contains four major integrated elements:

1. Vision, Mission, and Values
2. Success Outcomes
3. A detailed Work Plan to achieve
4. A Scorecard to monitor performance

In detailing the District's aspirations and specific steps for attaining goals set forth, the Strategic Plan plays an important role in long range planning. It provides clarity around the vision for achieving excellence, supporting employee engagement and professional growth, increasing Cherriots value within the community, and achieving financial health. The organizational tactics and scorecards displayed in the comprehensive Organizational Strategic Plan outline projects and programs to achieve the District's success outcomes. The strategic plan will be revised every year going forward to include updated organizational and divisional tactics. These updates will be incorporated into revisions of the LRTP as often as they occur.



Figure 1. Related planning processes over time

Plan	Update years		
	1 - 2	2 - 5	5 - 10
<b>Cherriots</b>			
Strategic Plan	●		
Service Plans	●		
Diversity, Equity, and Inclusion Plan		●	
Coordinated Public Transit Human Services Plan		●	
Long Range Transit Plan			●
Climate Action Plan			●
<b>Partner Agencies</b>			
SKATS Metropolitan Transportation Plan		●	
Local Comprehensive Plans		●	
Local Transportation System Plans			●
Local Climate Action Plans			●
Oregon Public Transportation Plan			●

\* SKATS = Salem-Keizer Area Transportation Study

## Public engagement

The Long Range Transit Plan was supported by a public engagement process that engaged community members to listen and learn about priority needs, inform us about their long range service priorities, and explore ideas and tradeoffs in developing an implementable public transportation plan. Public outreach activities occurred online and in person through the online survey, online open house, virtual workshop, stakeholder interviews, community presentations, outreach talking points and flyers, mailings, flyers posted on buses, and tabling events.

The project had two public engagement phases:

1. The first phase was in winter 2021 when we asked people within the communities to share their priorities and values for the future of the transit system and their unmet needs.
2. The second phase was in the summer of 2022 when we asked community members about transit strategies and alternatives to understand what works best for them and what else was needed.

### Cherriots planning process

This is Cherriots first Long Range Transit Plan but not the first time Cherriots has looked to the future. Other plans and documents guiding Cherriots development and growth include the Strategic Plan, Comprehensive System Analysis, and Metropolitan Transportation Plan, as well as contributions to city and county transportation system plans. Cherriots develops near-term service plans and policies that the staff and the Board develop as part of their annual work plans, in response to operational needs and opportunities. For more information on the near-term service planning process, see the Cherriots Strategic Plan.

### Stakeholders

Engagement opportunities were designed to be convenient to community members and create ways to provide meaningful input. The project team engaged stakeholders through broad community outreach and targeted outreach to current transit riders and communities often left out of planning projects, such as Spanish-speaking communities and people in rural areas.

The project team talked with a diverse group of stakeholders, including rural and underserved populations. The project team identified leaders within organizations that represented the following communities:

- Older adults
- People experiencing physical, intellectual, or developmental disabilities and visual impairments
- Refugees
- People of color
- Low income
- Students in elementary, middle, and high school, as well as local college students

Stakeholder interviews were conducted with the following groups:

- Marion County Intellectual and Developmental Disabilities Services
- Salem Health
- Mano a Mano
- Kaiser Permanente
- Micronesian Islander Community
- Chemeketa Community College
- Linn Benton Community College
- Blindskills, Inc.
- Northwest Human Services
- Oregon Commission for the Blind

Community presentations, which also included opportunities for group discussions, were given to Cherriots Citizens Advisory Committee (CAC), Keizer United, Salem-Keizer Area Transportation Study Technical Advisory Committee (TAC), Salem for Refugees, Edgewater Community Partnership Team, Community and Partners of East Salem - McKay Community Partnership Team.

Many of the groups the project team interviewed shared information about their rural constituents. The team indirectly reached rural residents through the Polk County Service Integration Team newsletter and the Santiam Service Integration Team email that were sent to multiple agencies and shared with the individuals and families that the agencies serve.

The team reached Spanish- and Russian-speaking communities by talking to people in their own language at tabling events in the region; hanging flyers in English and Spanish in the windows of Mexican markets; holding interviews on Spanish radio; sending bilingual postcards to over 12,500 households; and providing English- and Spanish-language paper flyers in food boxes at local food pantries.

For the first survey, the project team offered \$20 gift cards to incentivize survey and focus group participation. Gift cards were mailed to the first 50 survey respondents who provided their address and to 30 people randomly selected from the entire respondent pool. For the second survey, the project team incentivized survey participation by offering a \$100 gift card to two randomly selected people from the respondent pool. In both outreach periods, focus group participants received \$20 gift cards as a thank-you for providing input.

### Online open houses and surveys

The project team offered two online open houses in English and Spanish, each with an online survey. The online open houses were held in winter 2021 and summer 2022. The online open house format included project information using infographics, maps, and an existing conditions report. The survey was promoted using postcards mailed to more than 12,500 recipients in Marion and Polk counties and via flyers developed to share at events around the region. Participants also had the option to receive a print survey and postage-paid envelope.

Cherriots Long Range Transit Plan surveys received more than 600 responses combined, including print and electronic versions. The intent of the first survey was to collect input from participants about their mobility needs, how they use transit, and what would help them use transit or shared mobility services in the future. The second survey asked participants to choose their top priority strategies and future service types, with detail on preferred types of investments.

### Survey comparison

Cherriots completed an on-board rider survey in October 2021 to support the updated Needs Assessment that occurred during this plan. The rider survey reached a different audience than the Long Range Transit Plan online open house surveys. Both surveys yielded essential data for long range planning. This data will help Cherriots balance needs for existing and new riders.

Table 2 summarizes respondent demographics and travel patterns as provided in the survey data. The Long Range Transit Plan general public

survey respondents were more likely to identify as white, had a vehicle available to them, and used transit less often. The 2021 rider survey respondents included more people who identified with races other than white, were less likely to have a vehicle available, and were riding Cherris at least once per week.

**Table 2. Online open house and 2021 rider survey respondent comparison**

	Long Range Transit Plan general public	On-board needs survey
Caucasian	72%	53%
No vehicle	25%	84%
No driver's license	34%	72%
Use transit for nonwork trips (medical, etc)	80%	82%
Ride less than 1 time per week	47%	11%
Ride 1 or more times per week	53%	89%
Live in Salem or Keizer	85%	95%

Table 3 compares needs identified in the two surveys. The top choice in both the surveys was an increase in frequency and enhanced network coverage, indicating that these services are a top priority for both the existing riders and the general public. However, there were some notable differences. While the general public is interested in low- or no-emission buses and faster trips, current riders instead prioritized later service and operator friendliness (customer service).

**Table 3. Comparing needs from on-board and Long Range Transit Plan surveys**

Needs assessment (on board)	Percent	Long Range Transit Plan	Percent
Increased bus frequency	33%	Increased bus frequency	22%
Affordable fares	16%	Low- or no-emission buses	18%
Extend service later at night	15%	More stops and area coverage	15%
Operator friendliness	9%	Faster or more reliable trips	12%
More stops and area coverage	6%	Affordable fares	11%

## Public engagement themes

Table 4 shows the themes that were identified through interviews, presentations, and conversations with the public through both public engagement phases.

**Table 4. Public engagement themes identified from the engagement phases**

<b>Increase in frequency:</b> Frequency increases were preferred over geographic coverage increases .
<b>Affordability of fares:</b> It is especially important for college students and caregivers.
<b>Technology is important:</b> Although crucial for younger people, the older demographic has become technology savvy following the pandemic. Technology options selected include real-time schedule information, app-based fares, and digital kiosks.
<b>Interest in vanpools:</b> There is community interest in vanpools, especially if they serve people who are acquainted and comfortable with each other.
<b>Flexible transit:</b> An on-demand bus service serving different zones was one of the top choices as an option for Cherris to explore further.
<b>Same-day service:</b> Desired for paratransit riders, people with urgent medical appointments, and especially compelling for people who are blind or visually impaired, and for people with disabilities.
<b>Transit reliability in rural areas:</b> Important because many people live outside Salem where housing is more affordable and therefore need a way to and from Salem.
<b>Education campaign:</b> Improving education campaigns about how to find and use bus schedules, also at the high school level.
<b>Bus Stop accessibility:</b> Elements are required to increase accessibility such as street lighting and sidewalks (bus riders are pedestrians too).
<b>First and last mile service:</b> Needed for those who cannot reach a bus route that is a little too far to walk to.
<b>Diverse information media and languages:</b> Reach the Latinx community through Spanish media and TV, and Pacific Islander and Asian communities via flyers posted in Asian markets (languages: Chuukese, Marshallese, Pohnpeian, Palauan).

## Chapter 2. Who we serve

Cherriots is the name used for all fixed-route and demand response public transportation service operated and managed by Salem Area Mass Transit District (SAMTD). Cherriots operates service in the Salem-Keizer area seven days per week, and offers bus service connecting Salem and Keizer to other communities in Marion, Polk, Linn, and Clackamas counties.

### Population and employment

Marion and Polk counties had a combined population of 433,353 as of the 2020 census. As seen in Figure 3, Cherriots riders are proportionately more likely to identify as Black, Asian, Pacific Islander, Native American, or belonging to two or more racial groups. 47% of Cherriots riders identify as belonging to one of these demographics, while only 17% of Marion and Polk county residents identify as such. Cherriots riders are slightly more likely to identify as Hispanic or Latino, at 28% compared to 24% for all residents.

Riders are more likely to speak a language other than English at home. Figure 2 shows 29% of riders speak another language at home compared to 23% of the region's population. Spanish is the most common non-English language spoken in the home.

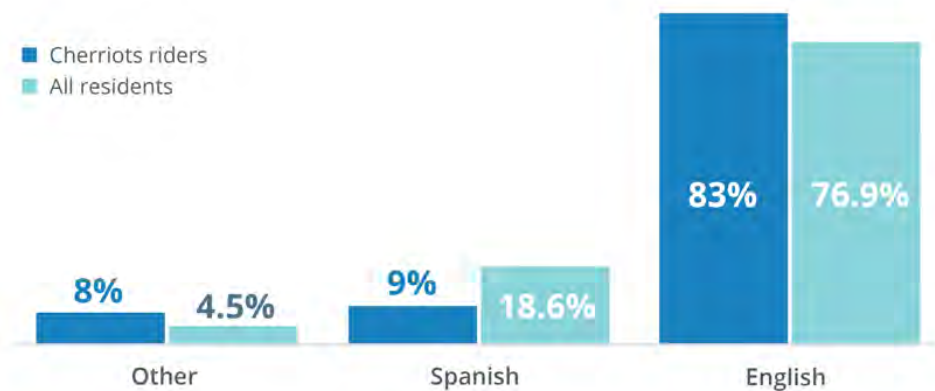
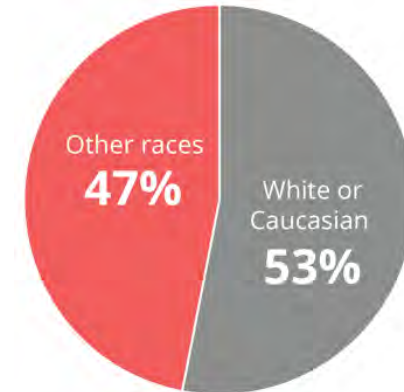
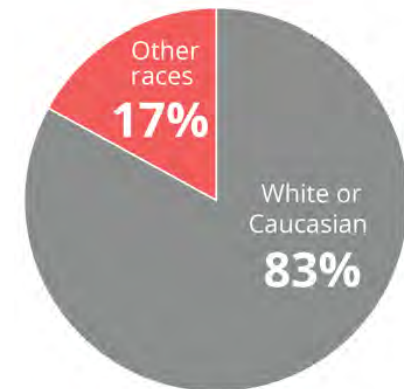


Figure 2. Language spoken at home



Cherriots riders



Residents of Marion and Polk counties

Figure 3. Demographics of Cherriots riders



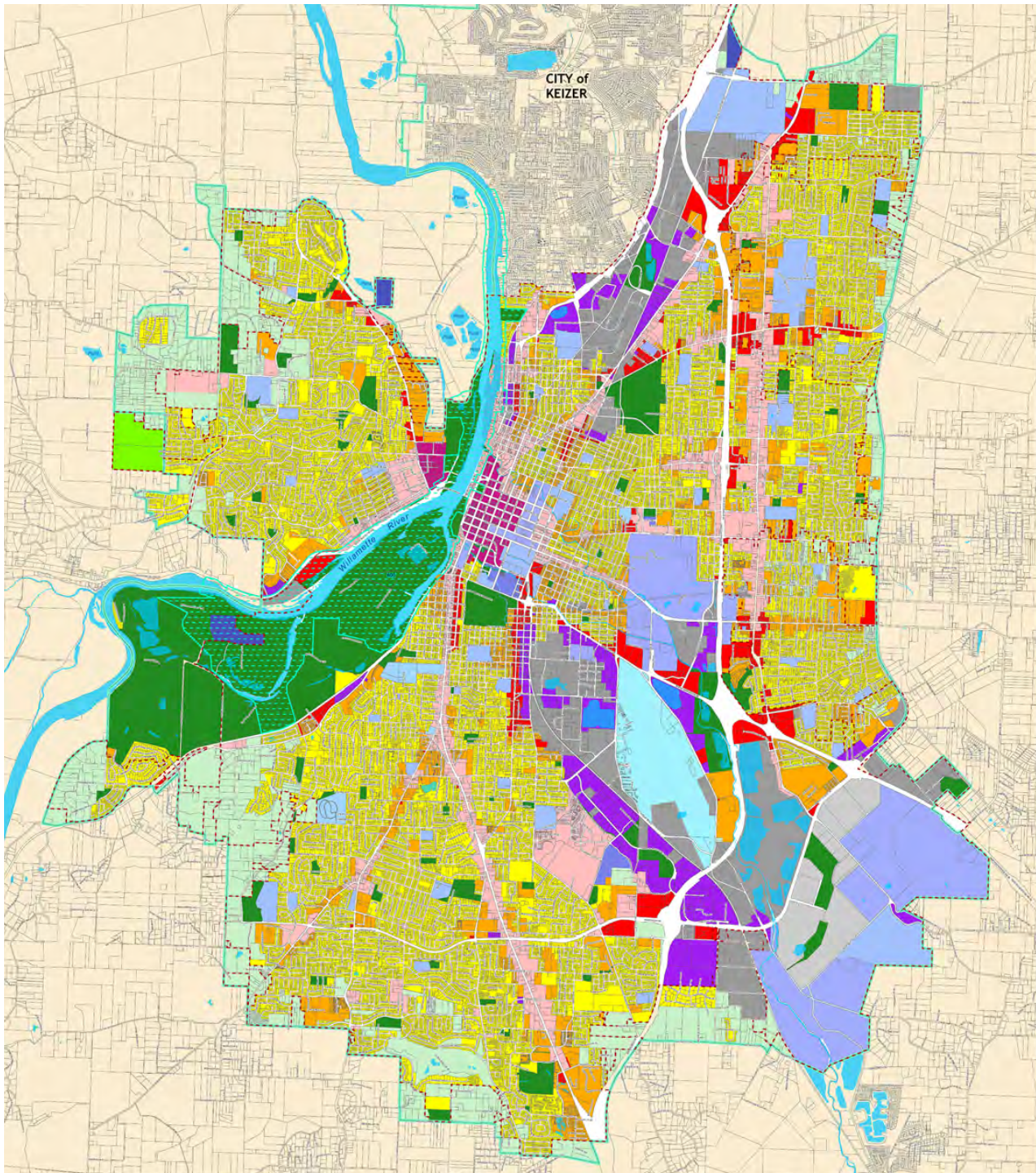


Figure 4. Salem Area Comprehensive Plan Map, October 2022

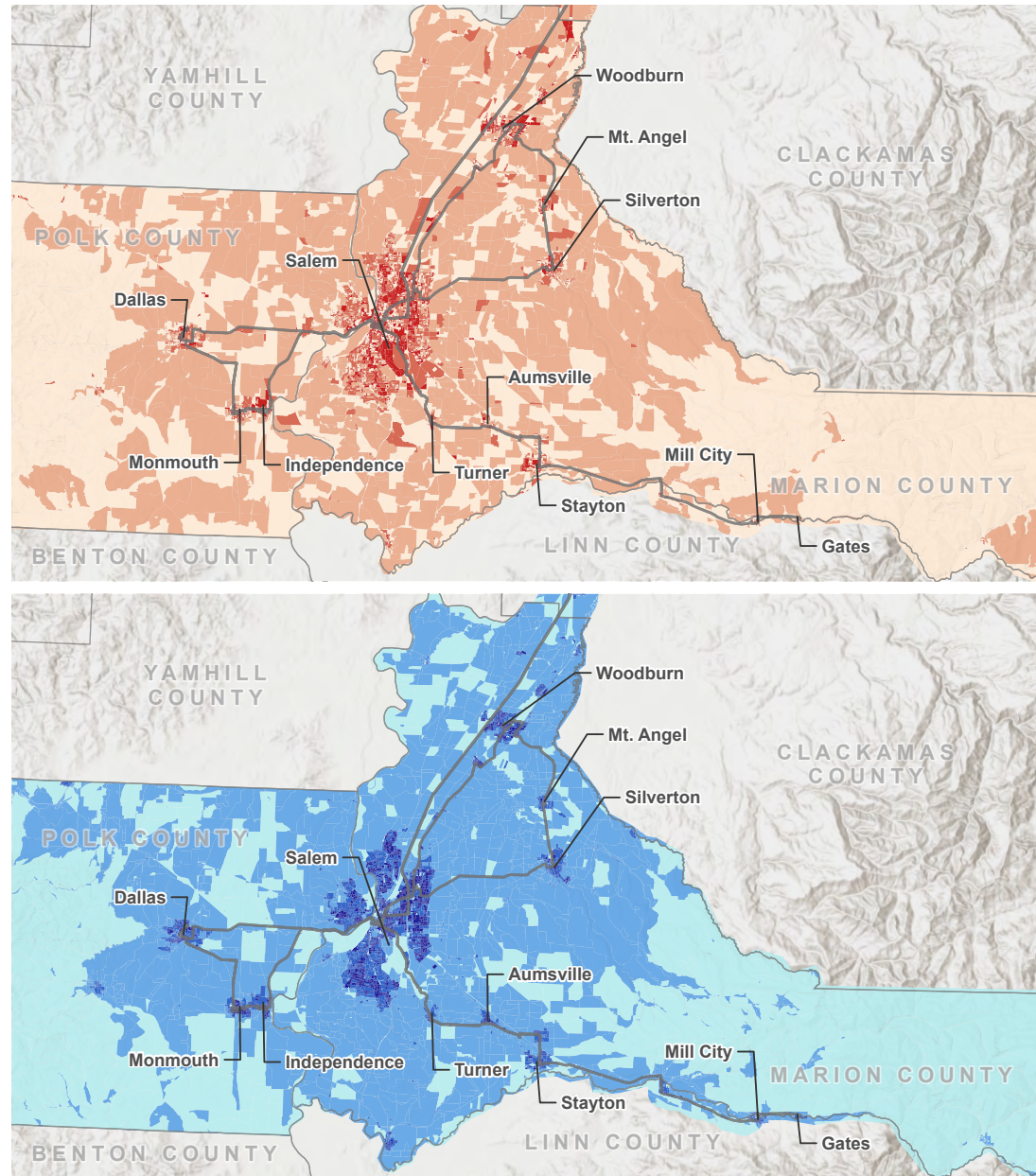
- COM - Commercial
- CB - Central Business District
- CS - Community Service
- CSA - Community Service Airport
- CSC - Community Service Cemetery
- CSE - Community Service Education
- CSG - Community Service Government
- CSH - Community Service Hospital
- CSS - Community Service Sewage - Solid Waste
- DR - Developing Residential
- EC - Employment Center
- FRM - Farm Resource Management
- IND - Industrial
- IC - Industrial Commercial
- MU - Mixed Use
- MFR - Multi-Family Residential
- POS - Parks - Open Space - Outdoor Recreation
- ROM - River Oriented Mixed Use
- SFR - Single Family Residential
  
- Willamette Greenway/Compatibility Review Boundary
- Salem City Limits
- Outside Salem Urban Growth Boundary
- UGB



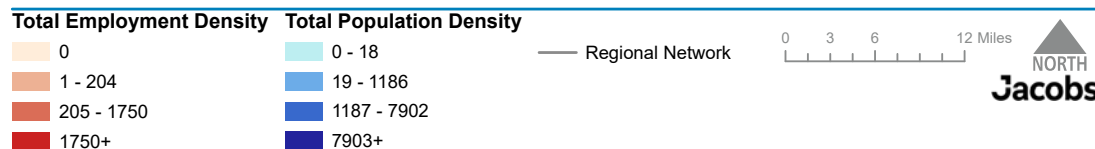
There is a wide gap in household incomes between Cherrriots riders and the area's overall population. Responses to the 2021 rider survey and data from the 2020 U.S. Census indicate that Cherrriots riders are five times more likely to live in households earning less than \$10,000 per year, while residents of Marion and Polk counties are 15 times more likely to live in households earning more than \$50,000 per year.

As Cherrriots riders are more likely to identify as a racial minority, earn lower incomes, and speak a language other than English at home, equity is a critical component of designing the Long Range Transit Plan.

In Salem, employment is concentrated in the downtown core and in the Southeast Mill Creek, Southeast Salem, Lancaster Drive, Northgate and West Salem neighborhoods. Figure 4 shows the 2022 City of Salem Area Comprehensive Plan Map. Yellow and pink shades are residential and mixed use zones, while red and purple are commercial and industrial zones representing most employment centers. Figure 5 shows 2019 employment and population density in Marion and Polk counties, which align with today's Cherrriots Regional network. The regional network also connects to employment centers outside of the counties, such as Albany, Tualatin, and the Portland metro region.

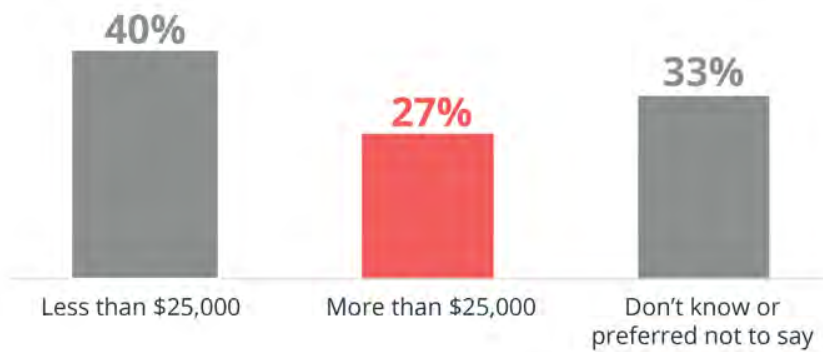


**Figure 5. Projected 2043 total employment and population densities in Marion and Polk counties**  
Source: SKATS Regional Model



**Figure 6. Percent ridership by annual household income**

Source: Cherriots 2021 Rider Survey



**COVID-19 and travel trends by income**

The COVID-19 pandemic affected travel patterns across the region. One annual source from the U.S. Census Bureau shows important differences in work commute trips by income levels. Differences by income are a vital statistic for Cherriots public transportation, as Cherriots surveys show that riders are more likely to have very low incomes or no other vehicle available for the trip. Figure 6 shows that 40% of current Cherriots riders are members of households that earn less than \$25,000 per year. Similarly, only 27% reported living in a household that earns more than \$25,000 annually.

Figure 7 shows commute data from the national Census. While the new data is a relatively small sample size, it tracks with other socioeconomic and transportation research. The data shows a decrease in total employment in Oregon and the Salem metropolitan region between 2018 and 2021. The number of people working from home increased over two times, while transit ridership declined by over half. Cherriots ridership has continued to rebound, though still below pre-pandemic levels. Preliminary analysis by income aligns with other research indicating that people with low incomes were less likely to shift to working from home, and more likely to have shifted to using public transportation. Cherriots will continue to monitor and analyze work and commute trends for people most in need.

**Figure 7. Changing work commute patterns, 2018 and 2021**

Commute measure	Salem metro area	Oregon
Total workers	▼ 1%	▼ 1%
Worked from home	▲ 216%	▲ 200%
Transit ridership*	▼ 57%	▼ 61%

Source: US Census Bureau, American Community Survey 1-Year Estimate, 2018 and 2021  
 \*Salem region transit ridership in the 2021 1-year estimate dataset has a very high margin of error due to sample size but indicates the direction of change; Cherriots will continue to monitor as more data become available.

**Cherriots services**

Cherriots Local and Cherriots Regional express buses provide fixed-route service, which are buses operating on a predetermined schedule and route. Twenty local bus routes serve the Salem-Keizer region, and six express routes and one deviated fixed route provide regional service. All Cherriots buses have wheelchair lifts or ramps and are Americans with Disabilities Act (ADA) compliant and accommodate up to two bicycles at a time on front-loading racks.

**Bus Service – Cherriots Local**

Local buses operate from 5 a.m. to 11 p.m. on weekdays, 7 a.m. to 9 p.m. on Saturdays, and 8 a.m. to 8 p.m. on Sundays and most holidays. Cherriots Local routes serve the Salem-Keizer metropolitan area with three levels of service.

**Frequent service (15 minute)**

Frequent service routes provide connections throughout Salem and Keizer every 15 minutes. All current frequent service travels on one or more Core Network streets (refer to the description that follows for a definition of the Cherriots Core Network).

**Standard service (30 minute)**

Standard service routes provide connections throughout Salem and Keizer.

### Basic service (60 minute)

Basic service routes provide both direct connections to transit centers in Salem and Keizer and to local neighborhood connections.

The Core Network is several transit corridors in Salem and Keizer where Cherriotics is committed by policy to focus on frequent and reliable transit today and into the future. The Core Network lets riders, business owners, and developers know where they will find transit today and in the future. The Core Network allows for some flexibility connecting certain segments and in serving the downtown core. Any changes require a formal Board of Directors action and a public hearing process.

### Bus Service – Cherriotics Regional

Most regional buses operate Monday through Saturday, connecting 17 communities outside of the Salem- Keizer region in Marion and Polk and Linn counties to Salem and Keizer.

Express routes run 4 to 10 round trips on weekdays, with fewer routes and trips on Saturdays. Express routes provide connections to 18 regional communities. The places served are Aumsville, Brooks, Dallas, Gates, Gervais, Independence, Lyons, Mehama, Mill City, Monmouth, Mt. Angel, Silverton, Stayton, Sublimity, Turner, Wilsonville, and Woodburn.

Express routes provide service to a limited number of stops in each community they serve and are compliant with federal guidelines. Yamhill Transit Area connects Salem to McMinnville via Amity, and the Tillamook County Transportation District connects Salem to Lincoln City via Rickreall and Grand Ronde. Stops on Route 45 within each community are spaced about a quarter mile apart, providing more access for seniors and people with disabilities. Figures 8 and 9 show Salem and regional routes respectively. Some of the rural cities also provide public transportation within their communities. Currently, Woodburn and Silverton provide transit to the public, and Monmouth and Independence are working on a pilot project to offer transit to connect the two cities.

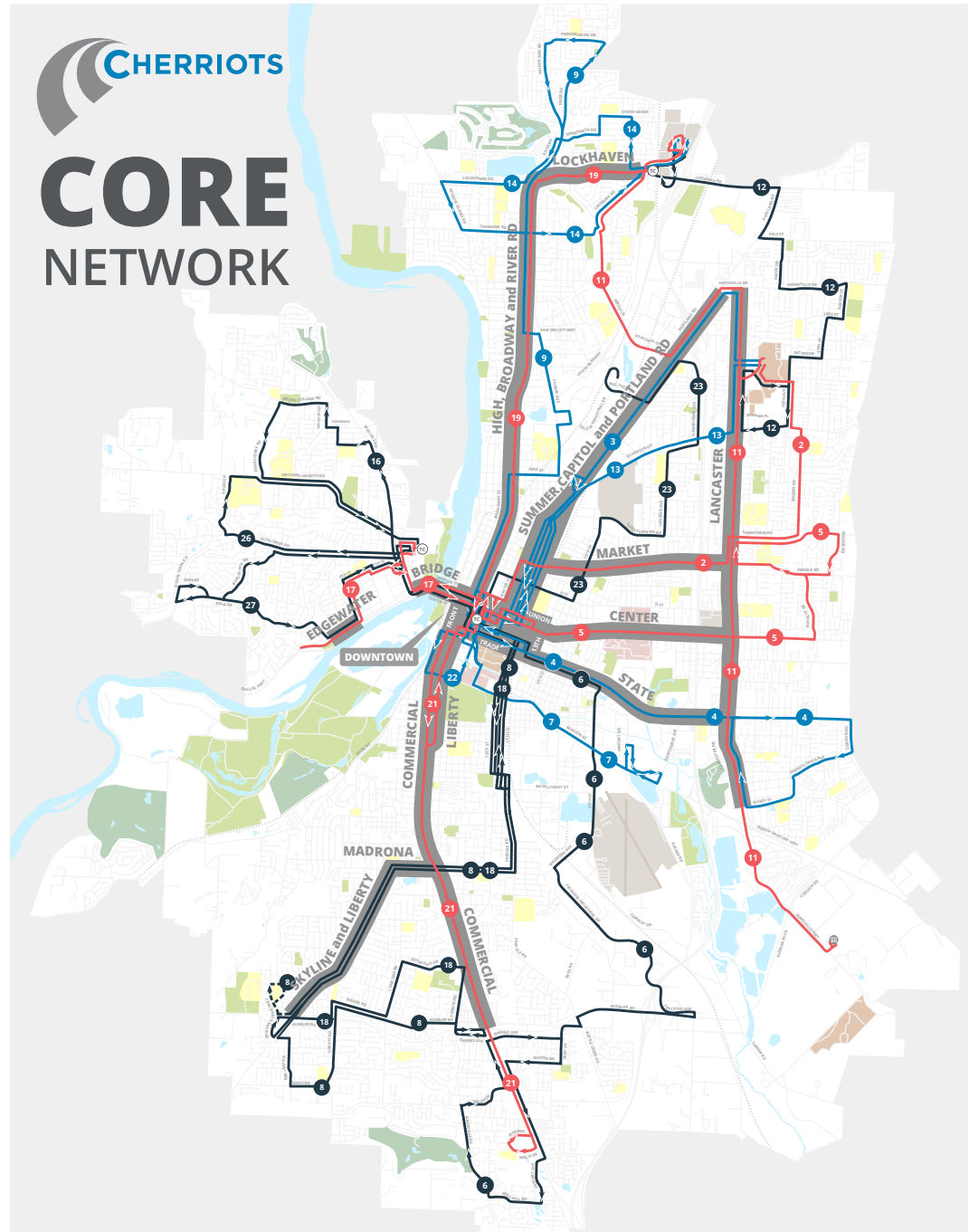
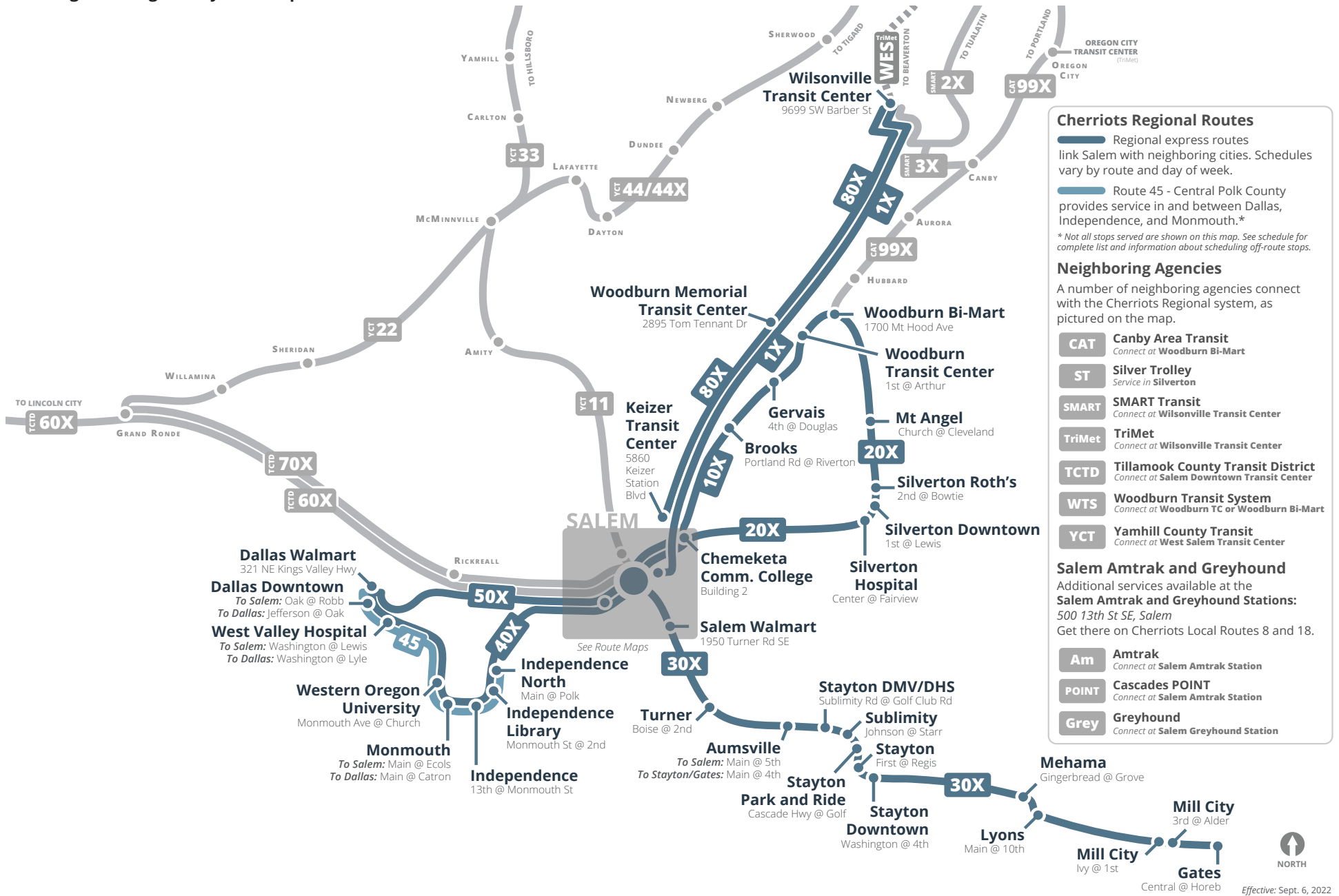


Figure 8. Cherriotics Local service map

Figure 9. Regional system map



Effective: Sept. 6, 2022

## On-demand service – LIFT and shop and ride

Cherriots LIFT is ADA paratransit that provides transportation service to individuals who cannot access Cherriots Local due to their functional ability. Users must apply to be eligible for this service and reserve their trip at least the day before their ride. LIFT operates within the Salem-Keizer Urban Growth Boundary on all days and hours Cherriots Local operates.

Cherriots Shop and Ride is an on-demand service available for individuals over the age of 60 or with a disability, offering a Shopper Shuttle and general dial-a-ride. The dial-a-ride service is an origin to destination service taking riders anywhere within the Salem-Keizer Urban Growth Boundary, operating Monday through Friday from 8 a.m. to 5 p.m. Rides must be reserved the day before the trip. The Cherriots Shopper Shuttle service was suspended in 2020 due to the COVID-19 pandemic but offered trips to retail centers four days a week.

## Vehicles, infrastructure, and technology

Cherriots currently operates more than 60 buses in peak morning and afternoon service, with an additional 40 vehicles dedicated to Shop and Ride and LIFT paratransit services. With the commitment to reduce emissions, Cherriots is in the process of replacing its diesel-fueled fleet with alternative-fueled vehicles, such as battery-electric and Renewable Natural Gas (RNG) models.

Cherriots is currently working towards implementing computer-aided dispatch, automatic vehicle location, and automatic passenger counting systems on-board its fixed-route fleet. Cherriots is improving the data monitoring equipment and systems to ensure full deployment in the efficiency in the near term.

Fares can be purchased at the Downtown Transit Center in Salem, in addition to other locations throughout the area such as the Chemeketa Community College bookstore and local grocery stores. While currently offering only paper fares and passes, Cherriots will introduce electronic fare payment, using fare cards and a smartphone app, in 2023.

There are 773 bus stops served by Cherriots Local and Regional buses system-wide. More than one-fourth of stops include amenities such as benches, shelters, and waste receptacles. Cherriots also maintains the Del Webb Operations Headquarters and four transit centers in Salem and Keizer.



Figure 10. Breakdown of buses by type

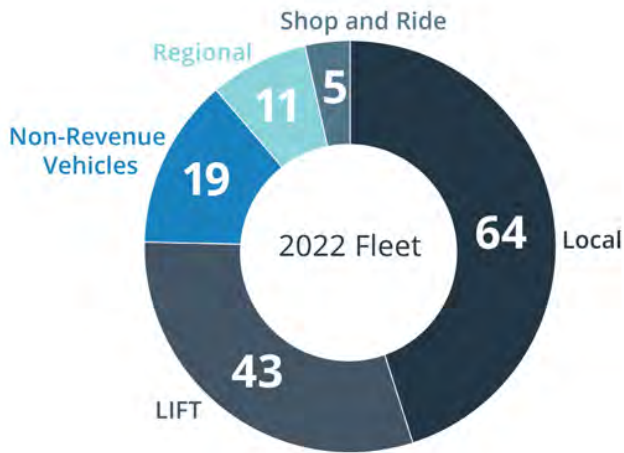


Figure 11. Cherriots employees

Cherriots relies on 305 employees to provide service across the region:	
General Management	13
Finance	10
Human Resources	6
Technology and Program Management	8
Communication	15
Operations	253

Note: Operations include Transit Operators (136), Operations and Transportation Supervisors (19), Maintenance (32), Maintenance Administration (8), Contracted Transportation (58).

## Organization, partners, and funding

In addition to 133 transit operators, Cherriots employs 170 others in the realms of General Management, Technology and Program Management, Operations, Finance, Communication, and Human Resources and Labor Relations. This variety in the types of work throughout the organization requires continual training and support for recruitment and retention of all positions.

### Partners

Cherriots relies on strong working relationships with agencies at all levels of government, businesses, educational institutions, and community-based organizations. These partnerships result in service planning, infrastructure improvements, and other ways to ensure Cherriots connects with communities to create sustainable, resilient transportation.

**Federal Transit Administration (FTA):** Cherriots is funded partially through federal funds allocated by the FTA and aligns service with FTA standards.

**Oregon Department of Transportation (ODOT):** In addition to federal and local funds, Cherriots is funded partially through state funds allocated by ODOT and aligns service with ODOT standards.

**Salem-Keizer Area Transportation Study (SKATS):** Cherriots works with this organization to guide short- and long-range regional service plans.

**Cities of Salem and Keizer:** Cherriots works closely with Salem and Keizer to plan for and deliver transit and mobility services across the urban area.

**Regional cities:** Cherriots Regional service exists based on continued partnership with cities around the region. Cities and unincorporated places currently served are Woodburn, Mt. Angel, Silverton, Gervais, Brooks, Gates, Mill City, Lyons, Mehama, Stayton, Sublimity, Aumsville, Turner, Dallas, Independence, Monmouth, and Wilsonville.

**Salem-Keizer Public Schools (SKPS):** Cherriots worked closely with SKPS, along with the cities of Salem and Keizer, to help Cherriots deliver the “Youth Zero” bus pass.

**Health care providers:** Many Cherriots riders rely on public transportation to access their health care appointments. Cherriots works with local health care providers to assure service is accessible for their patients.

**Businesses:** Cherriots considers both employees and customers of local businesses in their planning processes to provide optimal scheduling and routing decisions. Businesses also may need to engage in right-of-way acquisition decisions when applicable.

**Transit providers:** Cherriots works with surrounding transit providers to assure its services complement existing service:

- Woodburn Transit System
- Tillamook County Transportation District
- Yamhill County Transportation Area
- Wilsonville/SMART
- Canby Area Transit
- Confederated Tribes of Grand Ronde

## Funding

Operating costs fund transit service and include personnel services and materials, which includes transportation costs such as fuel, vehicle parts, and other miscellaneous expenses. Figure 12 shows Cherriot's average operating expenses by category.

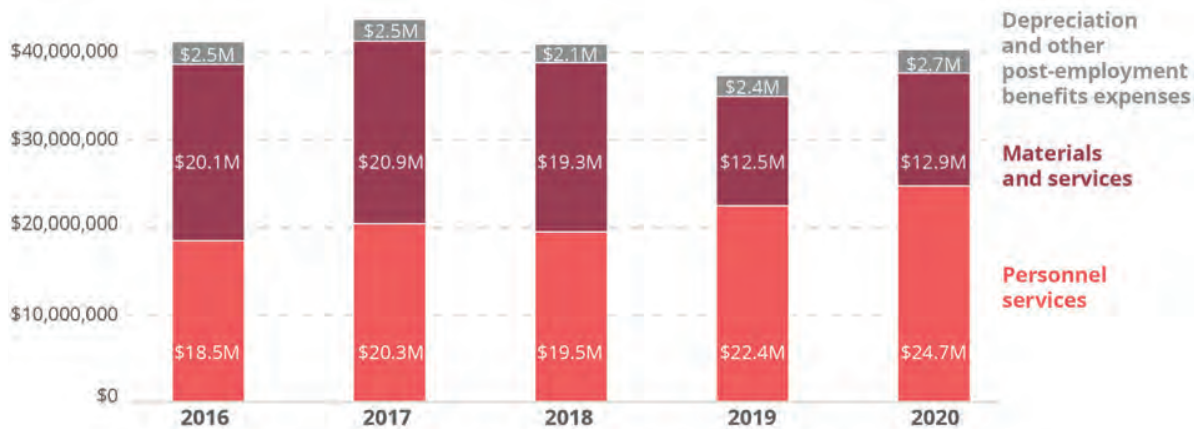
Capital expenses support nonoperational elements of the agency, such as vehicles, buildings, and landscaping. As Figure 13 presents, most expenses incurred were for vehicles.

Cherriots funding resources include a mix of funds from local, state, and federal programs. Figure 14 shows the breakdown of operating revenue and shows that Cherriots primary sources of revenue are local property taxes, federal assistance from the FTA, and state funding allocated from ODOT.

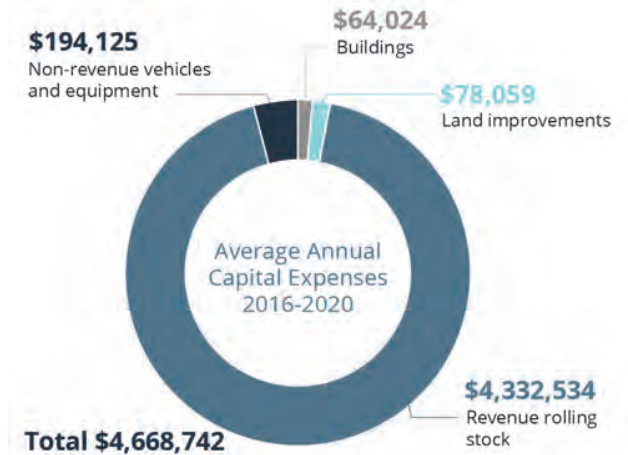
From 2016 to 2019, nearly 90% of total annual capital contributions were from the federal government, while approximately 10% were from the state. This category of funding may be offered through competitive federal or state grants or non-grant "formula" programs. Cherriots capital revenues total \$3.7 million, with \$3.3 million from federal funding programs.

**Figure 12. Average operating expenses by service category**

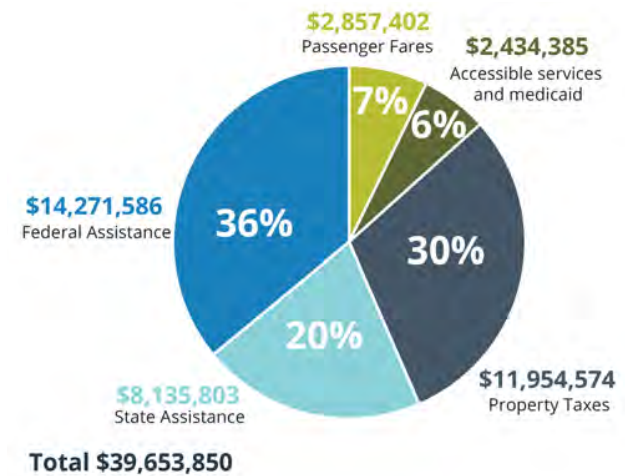
Source: Cherriots



**Figure 13. Average capital expenses**



**Figure 14. Average operating revenue and share by source**



## Chapter 3. Future services

The Long Range Transit Plan strategies describe Cherriotics investments to meet the District's vision, mission, values, and strategic priorities, working in coordination to deliver responsive, reliable, and safe transit. There are six top strategies that define the way Cherriotics will embark on this 20-year journey.

Figures 15 and 16 summarize these top strategies and other future service improvements in the Cherriotics transit system. All service changes will align with the Cherriotics Title VI program and follow public hearing requirements.

The strategies in this chapter are organized into six categories representing service or investment types. Each section in this chapter describes policies, services, and infrastructure investments to address rider needs and improve transportation in and connecting the region. These categories are:

- Transit network
- Bus stops and transit centers
- Customer information and fares
- Flexible mobility
- Transportation options
- Vehicles

### L RTP TOP MESSAGES AND STRATEGIES



**Meeting commitments to existing service goals.** One short to medium-term (1-10 years) Cherriotics priority is to expand both weekday and weekend service levels to meet goals for the Core Network and other routes. Cherriotics is still building on commitments to offer a baseline of bus service across the local and regional networks. Cherriotics will prioritize meeting policies set for the Core Network, Cherriotics Local and Cherriotics Regional routes, seven days per week.



**Adding service frequency and reliability to Cherriotics Local and Regional routes.** Cherriotics heard clearly in the public engagement conducted for the Long Range Transit Plan that new and future riders want to see more bus frequency on existing routes. This can include transit enhancements that help keep buses on-time and ensure access to services, jobs, and people across the region. Cherriotics will pursue these and other strategies to meet this need.



**Building Cherriotics into a Mobility Integrator.** Cherriotics is a trusted provider of transportation services and will look for opportunities to leverage its expertise to work towards offering options such as flexible routes and micro-transit, while building partnerships for emerging mobility such as bike share. Growing into a mobility integrator means staying informed of the travel needs and opportunities that are constantly changing in the communities we serve.



**Enhancing bus stops and transit centers.** The quality of amenities at Cherriotics bus stops and transit centers represent key gateways to opportunity. Cherriotics will make bus stops and mobility hubs that are safe, accessible, and with links to a variety of transportation options a key focus of this strategy.



**Building partnerships with local jurisdictions for service expansion and land use integration.** Cherriotics will continue to work in partnership with cities and counties to provide transportation services as our communities grow. Cherriotics will balance investments in new service areas while balancing capital and operating resources.



**Becoming a leader in environmental sustainability through clean transportation choices.** Cherriotics has started a zero emissions journey with groundbreaking investments in electric buses. Cherriotics will seek out and capture future opportunities to preserve and improve our environment.



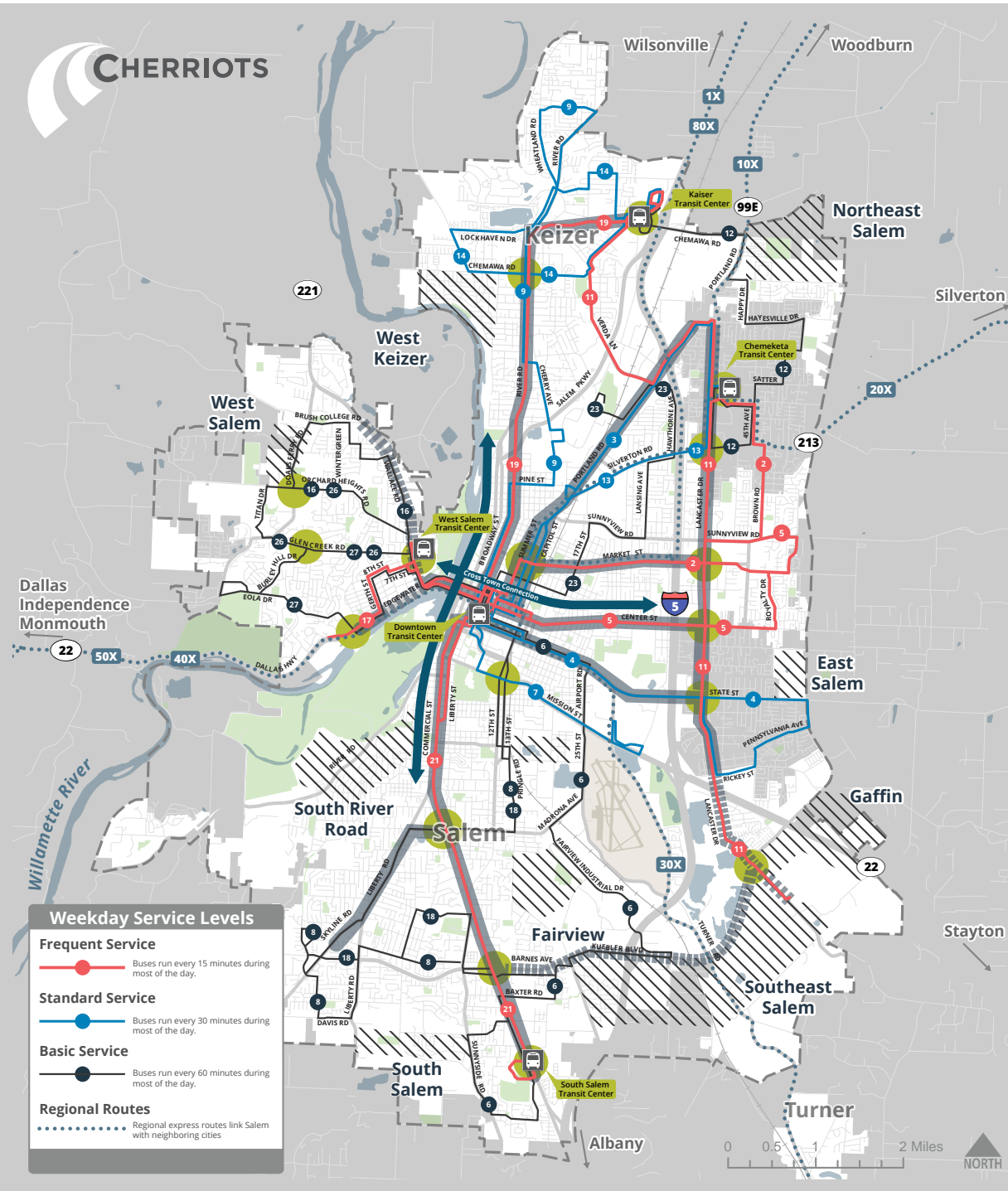
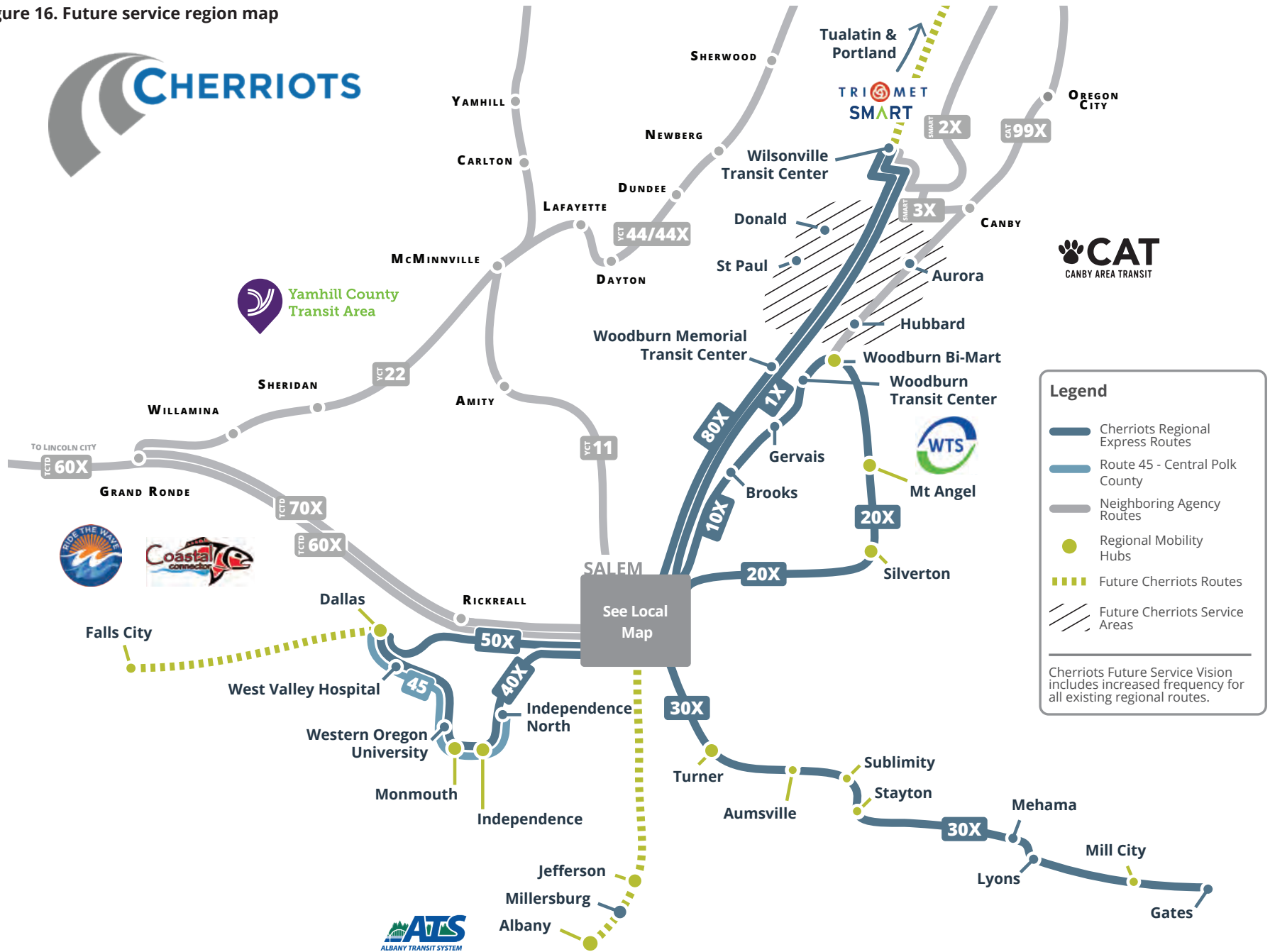


Figure 15. Future service vision map

Figure 16. Future service region map



# Transit network

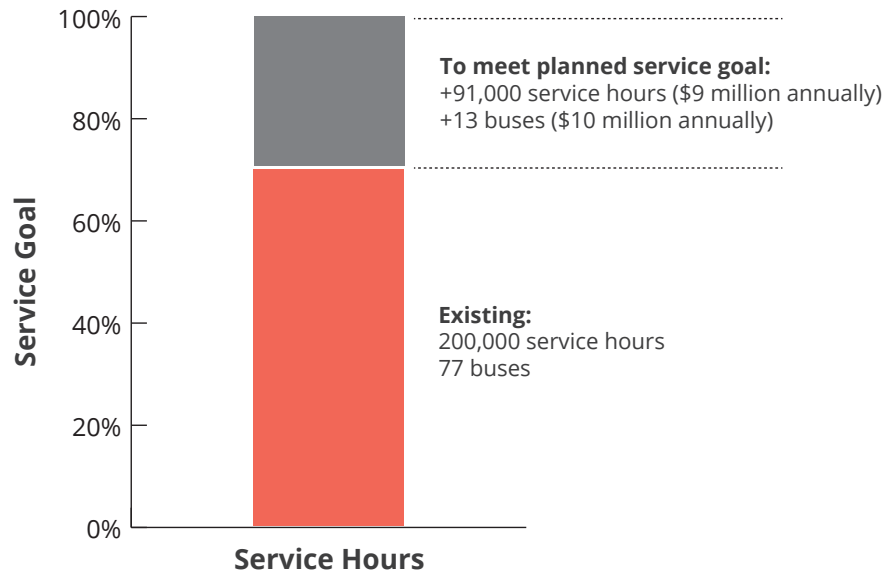
Innovative services and expanded infrastructure will be necessary to enhance speed and reliability and deliver the projected increased levels of transit operations throughout the Salem region. In the near-term, Cherriotics will prioritize meeting planned service levels on the Core Network and standard routes, seven days per week. New service will require supportive investments, including zero-emission vehicles, vehicle and operator layover facilities, and ADA-accessible bus stops. Also in the near term, recruiting and training a skilled workforce will continue to be a top priority to provide safe and efficient mobility.

## Adding service

### Increase service frequency to meet service goals and beyond

Higher frequency means shorter waiting times for both single trips and transfers, increasing convenience for riders. Increasing the frequency will enhance travel time and reliability, assuring riders that they will get where they need to go on time. Cherriotics has adopted goals of 15-minute weekday service on the Core Network, and 30-minute weekday service on standard routes. However, some routes have yet to meet these planned

Figure 17. Gap between existing and planned Cherriotics Local service



frequencies on weekdays, and some routes aren't operating at all on weekends. To meet the level of service already planned and in policy, Cherriotics needs to provide an additional 91,000 annual service hours, requiring at least 13 new vehicles. Meeting these goals is a crucial near-term step to realize Cherriotics' vision.

In the medium to long term, current and future fixed routes will be considered for frequency increases. This could mean service every 10 minutes on high ridership Core Network routes or doubling basic routes to 30 minute frequency instead of 60. In all cases, service changes will align with the SAMTD Title VI program and follow public hearing requirements.

### Increase service hours

Increasing the service span is critical for riders who may have non-traditional work schedules where they commute during off-peak hours and are not adequately served by current peak times. Increased service hours can also mean operating more existing routes on weekends and holidays. This will enhance reliability and safety for riders. Increases in service hours will be considered for all days of service, including weekends and holidays.

### Add route coverage

The network's geographic scope will expand beyond the neighborhoods currently served by both the local and regional routes. Residents living in unserved areas will benefit from having this enhanced connectivity. Coverage to these areas will likely have 30- or 60-minute frequencies and may have fixed-route service, connector services, or microtransit. Increased coverage and expansion of rural mobility will be described in greater detail in the following sections.

## High-capacity transit

Cherriotics envisions developing high capacity transit (HCT) on the Core Network where enhancing transit speed and reliability, safety, and access will support high ridership demand. HCT can also be called bus rapid transit (BRT) or simply high frequency transit and typically includes large (more than 40-foot) buses with the highest frequency of service. Developing a HCT program will be supported by the following steps.

Selecting HCT routes should prioritize solutions for people. Relevant planning factors to determine priority corridors include the following:

- Passenger travel time analysis, targeting corridors and areas with above average peak and all-day rider travel time delay

- Minimum corridor level ridership greater than 2,500 riders per weekday
- Medium- to high-density residential and commercial development, with mixed land uses (residential, commercial, and institutions)
- Public support from existing riders, key stakeholders, and agency partners, with emphasis on marginalized and historically underrepresented communities
- Connections to high use activity, employment, and service centers
- Corridor and right-of-way design fatal flaws or unresolved conflicts
- Final route alternatives analysis as required by FTA and National Environmental Policy Act processes

Develop guidelines for stations, operations, and route specific applications. Examples include the following:

- Minimum of 10-minute peak hour and 15-minute off-peak headways
- Minimum 17 hours of service per weekday and 12 hours on weekends
- HCT standard station designs that offer larger, branded stations with full amenity packages

- Transit signal priority or related features to prioritize transit travel times
- HCT dedicated applications in the right-of-way along selected routes to allow vehicles to bypass traffic congestion
- Operational conflicts must be analyzed and either mitigated or avoided with detailed operating plans to address the following:
  - Adequate space for larger vehicles within the right-of-way
  - Current traffic patterns and congestion must be analyzed and addressed
  - Identifying locations and modeling the charging needs for on-route charging infrastructure to ensure electric vehicles provide reliable service
  - Transit priority lanes and potential parking removal to accommodate transit stations may be necessary to provide the desired level of service
- The process of implementing HCT corridors will require the following:
  - Planning, design, and construction of the right-of-way to accommodate the larger vehicles, stops, and transit priority design treatments
  - Operations training for operators, maintenance staff, and dispatch
  - New and revised agency operating procedures
  - Technology upgrades to information technology and fiber optic infrastructure

**Table 5. High-capacity transit feature guidelines**

	Land use	Route	Features
<b>Transit priority corridor or bus rapid transit</b>	<ul style="list-style-type: none"> <li>• Medium to high population density, 4,000+ people per square mile</li> <li>• Mixed use (retail, services, residential)</li> <li>• Major activity nodes</li> <li>• Transit-supportive zoning and development policies</li> </ul>	<ul style="list-style-type: none"> <li>• Located on Core Network</li> <li>• Above average passenger delay</li> <li>• More than 2,500 existing riders per day</li> <li>• Adequate right-of-way and pedestrian space</li> </ul>	<ul style="list-style-type: none"> <li>• Dedicated lanes (full or partial)</li> <li>• Transit signal priority</li> <li>• Enhanced bus stops</li> <li>• High street connectivity and pedestrian access</li> <li>• Minimum 17 hours service weekdays</li> <li>• Minimum 10 minute frequency weekdays</li> </ul>

### Expand regional mobility

Service will be enhanced to better serve surrounding rural communities. Regional routes currently serve communities such as Dallas, Monmouth, Stayton, Silverton, and Wilsonville. Cherrits recently implemented Route 80X between Keizer, Woodburn, and Wilsonville. Staff will continue to identify resources for other regional connections such as to Portland and Albany. Cherrits will continue to consider past requests for service to new communities such as Saint Paul, Donald, and Jefferson in Marion County and Falls City in Polk County that have had low ridership potential and funding gaps, and identify opportunities in rider demand, local partnerships, and funding.

Regional mobility will be supported through increasing the span and frequency of service between rural communities and the Salem region, better connecting riders to major employment centers, services, and social opportunities.



**Table 6. Regional transit minimum service guidelines**

	Round trips per day	Days and hours of service	Supported connections
<b>Basic Regional</b>	2 to 4	Weekdays 6 a.m. to 7 p.m.	Health care, education, grocery, transit center
<b>Standard Regional</b>	5 to 8	All days 6 a.m. to 9 p.m.	Health care, education, grocery, transit center, parks, employment
<b>Frequent Regional</b>	9 to 15	Weekdays or all days 6 a.m. to 9 p.m.	Health care, education, employment, transit centers, services, entertainment

New mobility services such as flexible vanpool programs, on-demand shuttle programs, or enhanced park and ride facilities may help connect rural communities and enhance mobility. It will be important for Cherriots to continue to monitor and plan for changing rider needs in rural areas, as the travel preferences, operational resources, and activity centers change.

**Regional transit service guidelines**

Guidelines for regional transit service will help Cherriots prioritize resources and inform staff and local communities. Community representatives can use the guidelines to prepare planning requests and identify the level of service to review when considering Cherriots public transportation service for their community. Cherriots can use the guidelines to establish minimum service levels and set expectations for future development.

Any regional service would need to meet the following steps before committing Cherriots resources.

**Identify need.** New service to communities will need documentation summarizing transportation needs leading to the request for transit service. The information should relate needs to Cherriots vision and prioritize underrepresented and traditionally marginalized populations. The information can come from public engagement results (e.g., workshops, listening sessions), planning or feasibility studies, local multimodal transportation plans, or other sources specifically addressing transit service.



Table 7. Potential new service areas in the Salem-Keizer area

Growth neighborhood	Potential service types				Bus stop types
	Extended fixed routes	Demand response/flex routes	Bike share	TNC partnerships	
South River Road	●		●		Standard bus stop
West Salem	●		●	●	Standard bus stop
Fairview	●		●	●	Transit mobility hub
Southeast Salem	●	●	●	●	Standard bus stop
Gaffin	●		●	●	Transit mobility hub
Northeast Salem	●	●	●		Transit mobility hub
West Salem Transit Center			●	●	Transit center
South Salem Transit Center		●	●	●	Transit center
Chemeketa Community College			●	●	Transit center
Corban University	●				Super stop

TNC = Transportation network company, also known as ride hailing company

**Local community partnerships.** Cherriots looks to local partners to support ongoing service quality and rider access. Partners take different roles based on the service type and needs, such as leading public engagement, planning, or marketing, along with regular feedback and support in service design and funding opportunities.

**Safe, accessible bus stop locations.**

Regional service requires safe, accessible, and comfortable locations for people to wait for the bus. Cherriots offers expertise in transit operations and planning, and local communities can offer expertise in identifying, constructing, and maintaining safe bus stops for the regional system.

**New service areas**

Coverage will also be expanded within the current local service area, which is defined as the Salem-Keizer Urban Growth Boundary. New service areas will be selected and prioritized based upon current service levels and projected growth.

**Salem-Keizer neighborhood growth**

Cherriots heard about emerging neighborhoods throughout the local and regional networks through the public engagement performed for the Long Range Transit Plan. Table 7 shows each service area and service characteristics envisioned in the next 20 years. Each of these service areas, also shown in figure 15, is projected to emerge as a key neighborhood for future complementary transit options but may have fewer amenities in the near term. Table 8 describes amenities associated with each stop typology. All service changes will align with the SAMTD Title VI program and follow public hearing requirements.

## Connectors and circulators

Cherriots will support neighborhoods, cities, and other partners evaluating transportation solutions in serving their local communities. Cherriots priority is providing transportation services that connect people across the transit network. Circulators and shuttles are typically designed to serve a relatively small geographic area or market, so Cherriots will work closely with partners to provide expertise on the following:

- Market studies (demand analysis): Cherriots can provide data and information needed to understand the potential for service ridership, activity centers, and management. Examples include historical ridership data, ridership modeling and analysis, funding sources, and rider survey data. Cherriots will typically serve as project partner rather than lead agency for local studies.
- Service design: Cherriots planners can provide methods, alternatives, and operating considerations in service design phases. Service design would also include information about operating and capital costs based on Cherriots service delivery expenses to help evaluate operating plan choices. Cherriots will typically serve as project partner rather than lead agency for service design studies. If chosen as the service delivery lead, Cherriots will lead final service design.
- Service delivery: Cherriots can serve as the operating agency in some cases, under agreements with local agencies and in ways that do not lessen Cherriots core functions. Cherriots would integrate connector and circulator operating plans with the full transit network and operate to expectations set out in agreements.

Cherriots is committed to working with communities to advance transit services that work best for the local riders. Recently, Cherriots staff participated in the 2021 feasibility study led by the cities of Monmouth and Independence that evaluated shuttle or trolley routes connecting the two communities. The resulting service plan constitutes a trolley route with 20-minute headways for the majority of the day. The pilot project will run for two years, and the final budget is yet to be determined. Cherriots will serve as the operating agency once the pilot begins.

The City of Salem has considered transit routes that would serve only the downtown Salem core, connecting activity centers such as Riverfront City Park, the state capitol building, the Downtown Transit Center, and retail and entertainment areas roughly between Ferry Street SE and Union Street NE. The intent of such a service would be to provide access

to more people and reduce the infrastructure required to accommodate more traffic and parking as the city grows. Cherriots will continue to work with the City of Salem to explore shared mobility options for the downtown area to prioritize efficient, safe, and practical mobility options.

## Recommended future service enhancements

### Short term

- Extend the Route 80X service, the Route 1X service, or both to Tualatin from Wilsonville in order to connect all day to the TriMet system. This would provide a vital connection to the Portland metro region, which is a highly desired location to travel from the Salem-Keizer region. Eventually, light rail transit could be built from downtown Portland to the Bridgeport Mall area near I-5 and SW Boones Ferry Road. Currently, TriMet has a frequent transit service (Line 76 - Hall/Greenburg) connecting the cities of Tualatin, Tigard, and Beaverton with other lines that lead into downtown Portland and other areas of the metro region.
- Implement the Salem to Albany Regional Express route: A feasibility study completed in 2021 recommended that a future route would connect Albany and Salem while providing service to communities along the route, including Jefferson and Millersburg. Agreements with the City of Albany and Linn County are necessary to operate this service as recommended.
- Implement operations-supportive technology to provide data-driven route planning and decision making processes, including automatic passenger counters and automatic vehicle location equipment and supporting information technology resources.
- Extend service span: Increasing the span of service to start earlier and end later will increase access for people throughout the day, especially people working early and late shifts. Time extensions will be prioritized by factors such as ridership and key destinations.
- Perform a feasibility study for a potential downtown Salem circulator or shuttle route: The goal would be to reduce single occupancy vehicles entering downtown Salem, relieving traffic congestion, decreasing emissions, freeing parking constraints, and improving pedestrian safety (through the reduction of automobiles). The frequency of the new service would be consistent throughout the majority of the day in order to provide access for all members of the community.



### Medium term

- Identify routes for increased frequency based on ridership demand, crowding, and activity center development.
- Analyze and plan for Core Network expansion to reflect new travel patterns, including south Salem, connections to the South Salem Transit Center, and improved travel times to and from downtown Salem.
- Identify flexible transit zones: Develop service solutions for low-density and low-ridership areas where fixed route service is not viable. Examples include Hayesville and Eola, which experience lower ridership (relative to system averages).
- Identify new opportunities for regional mobility: Explore strategies to connect rural populations with transport to employment hubs across the region; explore flexible transit service, vanpools, and connectivity at park and ride lots.
- Complete planning for Highway 99E connectivity on Highway 99E between Salem and Oregon City.

### Long term

- Increase local coverage: Expand services to underserved areas of the Salem-Keizer region and emerging neighborhoods where projected development density supports fixed-route service. Expected areas include the following:
  - River Road South to Commercial Street near Candalaria Elementary School (south Salem)
  - Turner Road to Corban University (southeast Salem)
  - Fisher Road and Park Avenue (northeast Salem)
  - 36th Avenue and Boone Road south of Kuebler Boulevard (southeast Salem)
  - Clear Lake Road to the north and near Keizer Rapids Park to the west in Keizer
  - West Salem hills in the vicinity of Orchard Heights and Doaks Ferry Road
- Implement new service to flexible transit zones or emerging neighborhoods: Depending on factors such as ridership, topography, land use, or other neighborhood characteristics, flexible service options may include bike- or scooter-share, TNC partnerships, or other pilot programs.



## Bus stops and transit centers

Bus stops and transit centers are often a rider’s first contact with the transit system. Bus stops are Cherriot’s primary point of contact with the neighborhood and a public space that can enhance the sidewalks and streets. With an expanding network of service areas and service types, Cherriot’s will need an evolving set of options concerning bus stops and transit centers that will serve riders across the region. The amenities and design of each will influence the customer experience on a given route and the surrounding neighborhoods as it does today.

### Bus stop typology

A typology or tiering system provides guidance on deploying bus stop and transit center amenities based on ridership, land use, topography, resources, or other characteristics of the service area to meet riders’ needs. Stops with transfers, with longer than average wait times, or that are near popular destinations such as senior centers or medical centers may need more amenities. The initial typology this section presents provides ways to design and deploy bus stops across the region.

### Bus stop design guide

One way to formalize a bus stop typology is to adopt a formal transit stop design guide. Much like Cherriot’s Service Guidelines, a transit stop design guide could offer direction to staff and local jurisdictions about the type of bus stops and amenities considered for different local environments, vehicle designs, access and the ADA requirements, and rider needs. The design guide can help local jurisdictions develop and construct bus stops to support transit service, secure funding, and set expectations with partners to efficiently deploy resources across the service area.

### Standard bus stop

All bus stops in the Cherriot’s system should follow standardized design principles to ensure access and convenience. Stops for local service should be spaced approximately every quarter mile, with a corresponding bus stop in the opposite direction (on streets with two-way travel).

Bus stops serving regional routes should be placed within the communities being served. Typically, regional bus stops are placed at major destinations such as shopping centers, universities, and in the downtown core. Stops can also be placed at park and ride locations.

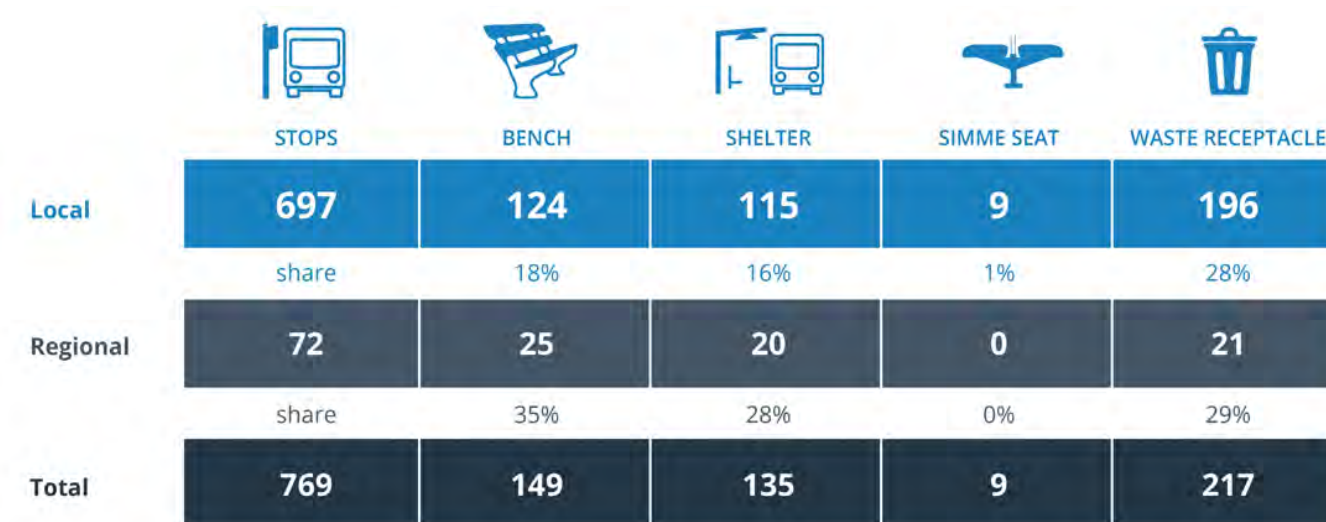


Figure 18. Current bus stops and amenities

The placement of bus stops in relation to intersections can have an impact on both safety and on-time performance. In the design of standard bus stops, Cherrlots prefers placing bus stops on the far side of intersections, which makes it easier and more efficient for buses to use traffic signal intervals to merge seamlessly back into the lane of travel.

Route Information should be available at all stops, or at least a Stop ID.

### Standard bus stop amenities

Amenities, such as benches and shelters, should be installed based on ridership in order to benefit the largest of number of riders. Special considerations may be given to stops where riders spend more time, such as important transfer locations. The minimum items that would be installed at all standard bus stops (local and regional) include bus stop signage and an ADA-accessible boarding location.

Stops with between 10 and 20 riders per day are excellent candidates for benches or the currently installed Simme-Seat products which attach directly to the bus stop sign pole.

Bus stops on local routes with over 20 boardings per day will be considered for shelter installation. On regional routes, bus stops with more than five boardings per day will be considered for shelters, on account of longer wait times.

### Other amenities

- Bike racks or bike lockers are recommended at transit mobility hubs and transit centers where adequate space is available.
- There are no plans for ticket vending machines to be installed at select shelter bus stops at this time, but this could be evaluated in the future if ridership or passenger needs warrant it.
- Trash receptacles may be placed at standard bus stops upon request where noticeable amounts of trash have been reported and at the discretion of the Service Excellence Team, an internal committee comprised of a diverse group of Cherrlots staff.
- Lighting is recommended for safety at all stops. If a bus stop does not have a lighted shelter and does not have a measured level of light as defined in the service guidelines, a motion activated, solar/battery-powered light-emitting diode fixture should be added to the shelter to provide a safe environment for riders and to help operators see riders. Cherrlots can work with the local jurisdiction to provide lighting with a street light if a stop does not have a shelter.

### Superstop bus stops

A superstop is envisioned as a larger bus stop that can accommodate more waiting riders, larger vehicles, and more than one vehicle at a time. Superstops are recommended for both local and regional routes, while the most common application is expected to be on the Core Network. Guidelines for superstops may include the following:

- Bus bays that allow staging of multiple buses
- Stops with two or more routes serving it where transfers regularly take place
- More than 40 boardings per day on average
- A location that meets transit mobility hub guidelines but lacks space at the site
- On-route electric vehicle chargers for SAMTD vehicles

Superstops would include all of the amenities in the standard bus stop with shelter, and the following:

- Large or multiple standard shelters installed on a bus stop concrete pad that includes all the previously listed items
- Sufficient space for two 40-foot buses or a 60-foot articulated bus
- (Optional) Micro-mobility parking for shared e-bikes and e-scooters

### Transit mobility hub

A transit mobility hub is intended to provide enhanced access to multimodal travel options for passengers to access the transit system. Mobility hubs may be co-located with park and ride locations, urban centers, retail or employment centers, and within residential areas. These hubs provide locations for first and last mile multimodal transportation options including potential staging locations for the following transportation options:

- On-demand flexible transit
- Ride share and ride hailing (transportation network company and taxi pickups/drop-offs)
- Car share
- Bike/e-bike or e-scooter share docking
- Secure bicycle or other mobility device parking
- Package delivery lockers

**Table 8. Transit center and bus stop typologies**

Bus stop types	Standard	Standard bench	Standard shelter	Super stop	Transit mobility hub	Transit center
Signage	●	●	●	●	●	●
Loading pad	●	●	●	●	●	●
Waiting pad		●	●	●	●	●
Bench/Simme-Seat		●	●	●	●	●
Shelter			●	●	●	●
Trash receptacles	Optional	Optional	●	●	●	●
Lighting	●	●	●	●	●	●
Digital messaging			Optional	●	●	●
Bike racks				●	●	●
Route information			●	●	●	●
Micro-mobility parking				Optional	●	●
Car share parking					●	●
On-route charging				Optional	●	●
Public restrooms						●
Layover lobby/desk						●
Employee breakroom						●
Security station						●
Shared retail						●

Transit mobility hubs are intended to have more amenities than a bus stop, but fewer amenities than transit centers. Mobility hubs may have the following amenities:

- Bus bays that allow staging of multiple buses
- One shelter at each bus bay
- On-street dedicated loading zones that provide for on-demand microtransit and rideshare (space for up to two vehicles is recommended)
- Bike/e-bike and scooter share parking areas that include racks for locking the vehicles
- Dedicated car share parking spaces, with electric vehicle chargers at each parking space (space for three to five vehicles is initially recommended, with potential for expansion)
- A digital messaging sign at each bus bay displaying real-time arrival information

**Transit centers**

Transit centers serve three or more local and regional routes and have multiple bus bays and shelters. Transit centers may have an awning that provides passenger protection for all bus bays instead of shelters. In addition to all previously listed requirements, transit centers should also include the following:

- Public restrooms
- Lobby for passengers
- Digital messaging signs at each bus bay
- A passenger information or service center with digital messaging display
- Employee breakroom and operations office
- Security staff and/or office
- Potential restaurant or retail space
- Park and ride options
- Awnings with PV panels for all stops that need a covered area

Table 8 summarizes transit amenities by each of the suggested bus stop types previously described.

## Customer information and fares

By September 2023, Cherriots will introduce electronic fare payment (e-fare) using fare cards and a smartphone app. This new fare payment technology will be accompanied by an update to Cherriots fare structure, reducing Cherriots Regional fares to match Cherriots Local fares and allowing for fare capping, which limits the total fare paid by customers once they reach the daily or monthly fare cap amount. Fare capping removes upfront cost barriers to purchasing passes, which may discourage or prevent low-income community members from using transit; it is projected to reduce the total cost of fares for most customers.

Electronic fare payment services will be provided by Cubic | Delerrock, which developed the Umo card (formerly known as Touchpass), which is currently the electronic fare payment vendor in Medford (Rogue Valley Transportation District), Bend (Cascades East Transit), and Eugene (Lane Transit District). In addition to fare payment, Umo's smartphone app offers customers multimodal journey planning, real-time travel information, and loyalty rewards. Transit apps and fare cards can also be used to store value for other pay-per-use transportation services, such as bike or scooter share, ride hailing (Uber, Lyft, and other app-based ride services), and parking.

Cherriots typically reviews fare structures every two years, although the COVID-19 pandemic delayed the most recent round of review. The fare review process completed in 2022 recommended simplifying the current fare structure by reducing Cherriots Regional fares to match Cherriots Local fares. Cherriots began a program in September of 2022 in partnership with the cities of Salem and Keizer, and Salem Keizer Public Schools, to give free rides to youth to ride transit.

When customers scan their fare card or smartphone app as they board the bus, their use of the system is recorded anonymously. This creates a data stream that can help Cherriots understand how the transit system is being used and adapt it to meet customer needs. The introduction of this technology, however, can also present privacy concerns for riders. Cherriots can undertake several actions to ensure that customer data is protected:

- Develop policies and procedures to keep customer data secure.
- Develop and communicate clear policies on how customer data is used, who can access it and for what purposes, and how it is retained.

- Anonymize and aggregate data that is collected to protect customer privacy and identities; for instance, with the future e-fare system Cherriots will be implementing, customer payment data are always tokenized. Administrative users of the system can be limited to reports containing only aggregated (summary) data, eliminating the chance they will see sensitive customer information.
- Ensure that customers can easily purchase fare cards in cash and use them without tying the cards to personally identifiable information, such as the customer's name and address; for instance, the future e-fare system will have account registration as optional and card users will have the option of using anonymous accounts. For registered users, only a username and password are required.

### Strategy and actions

#### Short term

- Complete implementation of e-fare program, including actions to protect customer data.
- During the next fare review cycle, identify opportunities to expand reduced fares to other groups.
- Monitor the adoption of e-fare payment by seniors, people with disabilities, low-income riders, and ethnic minority riders.

#### Medium term

- Regularly review the potential effects of proposed changes to fares and fare payment technology from a Title VI perspective.
- Identify opportunities to reduce barriers to use of new trip planning and fare payment technologies for low-income riders.
- Look for opportunities to extend e-fare payment to new and existing services.

#### Long term

- Continue to explore new technologies that can make fare payment easier for customers and provide additional benefits to Cherriots.
- Leverage data collected from e-fare payment to inform service plan and fare updates.

## Flexible mobility

As new transportation technologies become available, Cherriots can supplement its core local and regional fixed-route bus and paratransit services by taking on the role of mobility manager, forming partnerships to support flexible, shared, and on-demand transportation modes. These modes include micromobility (shared e-scooters and e-bikes), car share, on-demand transit, ride hailing, vanpools, and more. Customers can use flexible mobility to access Cherriots bus transit and to travel in areas that are not efficiently served by fixed-route transit, such as lower-density residential neighborhoods. As previously described, these modes can be integrated into transit mobility hubs by providing dedicated parking spaces, racks, and loading zones to facilitate transfers between these modes.

In its role as mobility manager, Cherriots can extend its e-fare payment and trip planning systems to shared micromobility, ride hailing, and car share use. Enabling customers to pay for all their travel using a single fare card or app makes transferring between modes easier and more welcoming for people who are new to using transit as well as seasoned transit users. Integrated trip planning and reservations for transit, e-bike, and e-scooter share systems can likewise make transit and related modes more convenient.

As a mobility manager, Cherriots can determine how it will approach implementing shared micromobility. In a leadership role, Cherriots would secure funding, contract with vendors, and manage shared mobility programs. Cherriots can partner with shared mobility operators to ensure that new modes are integrated into mobility hubs and transit centers, support integrated e-fare payment for transit and other modes, and work with all regional jurisdictions and agencies (such as Salem, Keizer, Marion County, and ODOT) to ensure that bicycle and scooter infrastructure provides safe and comfortable access to transit. As it determines its future role, Cherriots can learn from bike share and e-scooter programs in Portland and Eugene, the shared e-scooter pilot that operated in Monmouth for about a year, and past efforts to provide bike share in Salem. The recent closure of Salem's nonprofit bike share system, as well as the vendor issues experienced by Portland in their e-scooter pilot, underscore the importance of a strong public agency partner to the success of shared micromobility.

On-demand and flexible-route (flex) transit can supplement Cherriots core bus network, particularly in areas where ridership is too low to make frequent fixed-route service cost effective. Currently, Cherriots provides flexible service for customers riding Route 45 in Polk County. Customers can request off-route pickups or drop-offs one day in advance by calling the

Cherriots Call Center. This service could also be supported with app-based reservation and scheduling, potentially integrated with Cherriots e-fare payment and trip planning software.

Cherriots has tested on-demand transit service in the past, notably with the West Salem Connector pilot, which provided first- and last-mile connections to the West Salem Transit Center from 2015 to 2017. The on-demand booking and routing software was unreliable, resulting in poor on-time performance during the first six months of the pilot. Ultimately, on-demand service was not cost competitive with fixed-route service and was replaced with expanded fixed-route service within the West Salem neighborhoods.

This experience highlights some of the opportunities and challenges with on-demand and flexible route transit service. Booking and routing software have improved over the past decade, and customers increasingly use smartphones, both of which make on-demand transit easier to use. As Cherriots implements a new e-fare payment system, customers will also become more comfortable with fare cards and app-based payment and trip planning. However, on-demand transit typically generates higher costs per rider than fixed-route transit. To ensure that on-demand and flex-route service meet customer expectations and support system-wide performance, Cherriots should establish clear metrics for ridership and cost effectiveness along with performance standards to determine where innovative services are appropriate.

### Strategy and actions

#### Short term

- Look for opportunities to use flexible mobility to provide first- and last-mile connections for riders who are traveling throughout the region.

#### Medium term

- Establish clear standards for the performance of on-demand and flex-route transit to guide future implementation.
- Incorporate flex routes, ride hailing partnerships, and expanded vanpools into scenarios during future updates of the Long Range Transit Plan.
- Look for opportunities to expand on-bus bicycle capacity as existing vehicles are replaced.
- Work with service providers to integrate new mobility options into Cherriots e-fare payment and trip planning systems.



An example of a bike share program in Park City, Utah

## Transportation options

Through its Transportation Options program, Cherriots provides information and resources to support the use of transit, vanpooling, carpooling, biking, and walking throughout Marion, Polk, and Yamhill Counties. The program has seen substantial shifts in the demand for its services over the past few years, and updates to Oregon's Employee Commute Options (ECO) rule will likely result in additional changes to how the program is funded and operated.

Prior to 2020, Transportation Options programs in Oregon typically focused on providing nine-to-five commuters with alternatives to driving alone. The COVID-19 pandemic spurred a rapid rise in telecommuting, and many office workers continue to work remotely; Cherriots staff expect that the pandemic will continue to affect how people get to work and the need for transportation options. This creates the opportunity to expand Transportation Options programs to new customers, including manufacturing and service workers, students, and seniors.

Cherriots can expand its Group Pass Program, which provides bulk transit passes at a discount to participating employers, to partner with housing developments, colleges, and universities. The Group Pass Program could potentially be expanded into a mobility wallet if Cherriots e-fare payment technology is integrated into other modes, such as ride hailing, taxis, and bike share. The City of Portland's neighborhood-based Transportation Wallet program is an example of how similar approaches have been tried in Oregon.

Oregon is currently updating the ECO rule to align with changes to transportation planning requirements that were developed during the Climate-Friendly and Equitable Communities (CFEC) rulemaking process. The Climate-Friendly and Equitable Communities rulemaking was advised by a diverse group of over 40 community members, including representatives from priority populations and each of the eight metropolitan areas. The rules strengthen Oregon's transportation and housing planning in regions with populations over 50,000 people (Albany, Bend, Corvallis, Eugene/Springfield, Grants Pass, Medford/Ashland, Portland Metro, and Salem/Keizer). These rules focus on equitable mapping, engagement and decision-making, climate-friendly areas, reforming costly parking mandates, climate goals, community engagement, and Oregon's transportation future.

To comply with CFEC rules, cities and counties must address transportation options in the development of transportation system

plans, making local jurisdictions even more important to Cherriots success in implementing its Transportation Options program. While the ECO rules update is still in progress, it is anticipated that funding, operations, and overall program priorities will shift in response. Cherriots staff have also been notified that state-level funding allocations for vanpools will change.

Cherriots is in the process of developing a Transportation Options strategic plan to address the needs of current program users and respond to changes in state regulations and funding streams. This plan will guide how Cherriots Transportation Options programs function over the next several years. Potential strategies and actions for staff to consider when developing the plan are shared in the following subsections.

### Strategy and actions

#### Short term

- Complete the Transportation Options strategic plan to ensure that it complies with updated ECO rules and meets the needs of travelers in Marion, Yamhill, and Polk Counties.
- Partner with new multifamily housing developments close to the Salem Downtown Transit Center to provide information and encouragement for walking, biking, carpooling, and transit use. Consider piloting a residential Group Pass Program with one or more new housing developments.
- Expand vanpool programming to manufacturing and agricultural employers.
- Expand the Group Pass Program to partners in housing developments, colleges, and universities.

#### Medium term

- Expand program activities to promote bicycle riding and provide training.
- Leverage alignment with local Climate Action Plans and business and community sustainability priorities to increase shared mobility options in the region.

#### Long term

- Regularly update the Transportation Options Strategic Plan to respond to changes in technology and how people travel.



# Vehicles

Cherriots has committed to replacing its entire fleet with zero-emissions vehicles, such as battery-electric buses, by 2040. Zero-emissions vehicles are integral to the Salem Climate Action Plan as the city plans to reduce overall greenhouse gas emissions by 50% by 2035, en route to becoming carbon neutral by 2050.

The agency currently has 15 battery-electric buses, funded, in part, through the U.S. Department of Transportation’s Low or No Emissions Grant Program, which provides funds for local authorities to purchase low or zero-emissions vehicles and accompanying infrastructure, such as depot and on-route chargers.

All current renewable diesel (R-99)-fueled vehicles operating Cherriots fixed-route service are nearing the end of their useful lives (defined as 12 years in operation, or 500,000 miles). By 2027, all existing diesel buses will reach the end of their useful lives. By 2036, all of Cherriots current Renewable Natural Gas (RNG) models will also reach the end of their useful

lives, allowing the agency to replace all existing R-99 and RNG model buses with zero-emissions models before 2040. Figure 19 provides a timeline of when the existing fleet will reach the end of its useful life and when buses can be replaced with zero-emissions vehicles.

Cherriots will prioritize zero-emission buses throughout the Core Network. Electric vehicles will first be deployed on Route 11, traveling 12 miles between the Keizer Transit Center and the Marion County Correctional Facility. This route ensures that multiple historically disadvantaged neighborhoods benefit from the electric buses’ reduced air and noise pollution.

## Strategy and actions

### Short term

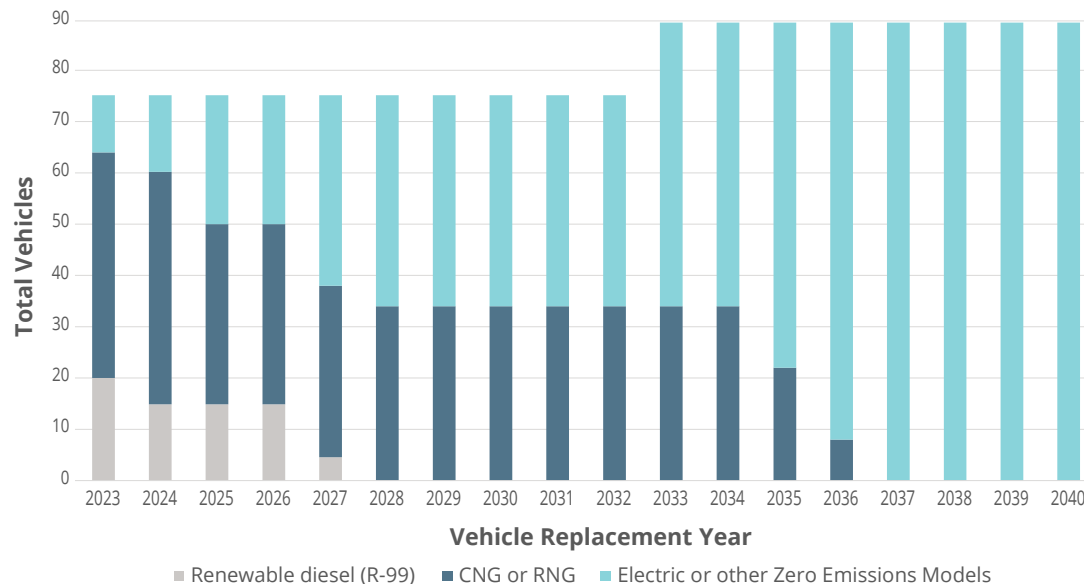
- Replace the current R-99 fleet with zero-emissions buses.
- Continue to expand capacity for electric vehicles and explore funding opportunities for zero-emission buses and charging infrastructure.

### Medium term

- Replace all existing RNG model buses, serving local routes, with zero-emissions models.
- Prioritize ongoing training for Cherriots maintenance and transportation staff to maintain and operate an increasingly zero-emissions fleet.
- Continue to expand capacity for electric buses through additional depot and on-route chargers.

### Long term

- Investigate and study new opportunities as zero-emissions and other technologies advance and become more widely available.
- Cherriots will continue its focus on reducing emissions and improving the local environment by focusing on the following:
  - Investing in battery-electric buses and electric infrastructure
  - Continually pursuing new and innovative technologies that lower Cherriots reliance on fossil fuels.



**Figure 19. Cherriots fleet replacement timeline**

Source: Cherriots Transit Asset Management Plan 2018; assumes 12-year useful life benchmark and all new vehicles are zero-emissions technology

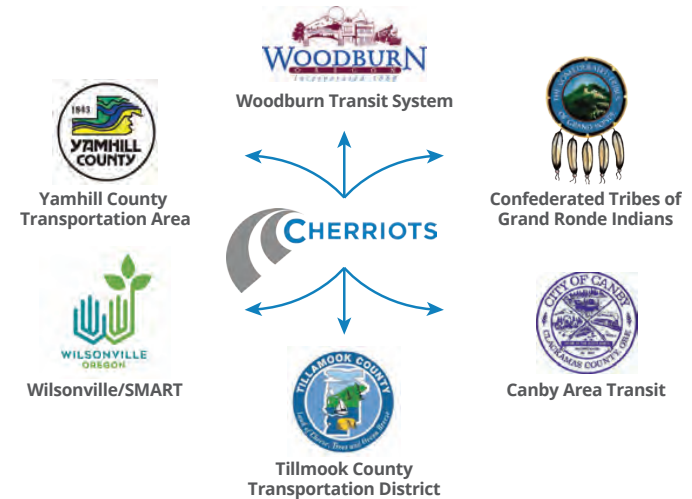
# Chapter 4. Implementation

To deliver the strategies outlined in Chapter 3, Cherriotics will need to adapt as an organization to ensure it keeps pace with people’s transportation needs and remains a relevant part of the communities it serves. This chapter describes ways the organization will assess, grow, and maintain its role as a mobility provider in the Salem-Keizer region.

## Agency coordination

Cherriots relies on strong working relationships with agencies at all levels of government, businesses, educational institutions, and community-based organizations. These partnerships result in routes, infrastructure improvements, and ways to ensure Cherriots connects with communities to create sustainable, resilient transportation.

- FTA: Cherriots is funded partially through federal funds allocated by the FTA and aligns service with FTA standards.
- ODOT: In addition to federal and local funds, Cherriots is funded partially through state funds allocated by ODOT and aligns service with ODOT standards.
- SKATS: Cherriots works with SKATS as the federally designated metropolitan planning organization to incorporate public transportation projects and policies in regional planning and funding priorities.
- Salem and Keizer: Cherriots works closely with the cities of Salem and Keizer to plan for and deliver transit and mobility services across the urban area.
- Health care providers: Many Cherriots riders rely on public transportation to access their health care appointments and essential worker jobs. Cherriots works with local health care providers to ensure service is accessible for their patients and employees.
- Businesses and institutions: Cherriots considers employees and customers of local businesses and institutions such as hospitals and colleges in their planning processes to provide responsive transit services.
- Regional cities: Cherriots Regional service exists based on continued partnership with cities around the region such as Silverton, Dallas, Wilsonville, and Monmouth.
- Transit providers: Cherriots works with surrounding transit providers to assure services complement existing service.



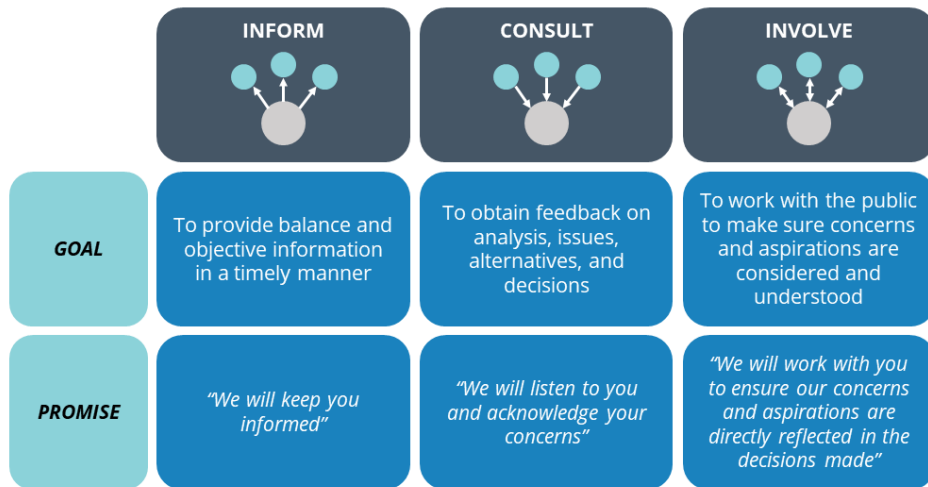
## Engaging communities

Cherriots responds to changing transit needs with the public’s participation and confidence. Partners will be engaged during the needs assessment process to learn what diverse needs exist throughout the community. Cherriots will continue to build positive relationships with organizations, individuals, neighborhoods, decision-makers, businesses, and others. Building public trust and building understanding of the value of Cherriots is key to growing and delivering a robust public transit system. Cherriots, as a taxpayer-funded special district, is committed to transparency and encourages public participation.

### Public/community engagement

Cherriots engages the public through a combination of three different types of engagement: inform, consult, and involve. Figure 20 is a chart showing the goal and promise behind each of these three types of engagement, as defined by the International Association of Public Participation (IAP2).

The type of engagement used should be appropriate to the audience being approached and the strategy being presented. Cherriots will evaluate which method, or combination of methods, to use as it works towards delivering the strategies described in Chapter 3.



**Figure 20. Goals and promises of the three types of engagement**

### Community partners

Partners are external organizations that work with Cherriots to help advance opportunities and conditions for travelers to use alternatives to driving alone. These partners include the following:

- Civic groups
- Faith community
- Education
- City and county governments
- News media and bloggers
- Local business
- Neighborhood associations
- Transit agencies
- Social services and nonprofit organizations
- Communities of color
- Indigenous tribes

### Strategies for public engagement

Cherriots staff will use a variety of strategies to engage the public during public engagement periods. The following list describes some strategies that have been successful in the past:

- Online: Email blast in Spanish and English to all subscribers, bilingual posts on Facebook and Twitter, and a feature element on the Cherriots home page
- On buses: Bilingual bus ads, onboard announcements, and flyers on the buses
- At transit centers and bus stops: Monitors inside of the customer service lobby, and sandwich boards and monitor ads at the transit centers
- Events: Organizing open houses, workshops, and focus groups, and inviting riders and other members of the public to attend (and providing interpreters as needed). These are generally in-person events, but sometimes can be virtual meetings to increase accessibility.
- Promotion in the community: Bilingual flyers posted on neighborhood bulletin boards and at local businesses, notices on bus stops that could be affected, press releases, and interviews with the media
- Going directly to the public: Bilingual flyers posted on neighborhood bulletin boards and at local businesses, tabling at transit centers or large grocery stores with lots of customers (and providing interpreters as needed)

### Cherriots diversity, equity, and inclusion plan

Cherriots aims to cultivate a more inclusive and equitable workplace for its staff and reaffirm its commitment to fairness and respect towards all members of the diverse communities of Marion and Polk counties. The Cherriots diversity, equity, and inclusion (DEI) plan is organized into five parts:

- Key definitions
- Why diversity, equity, and inclusion?
- Summary of findings
- Recommendations
- Diversity, Equity, and Inclusion Strategic Plan

All Cherriots team members will be involved in the implementation of the DEI Plan as it is woven into every part of the agency, including long range planning efforts. The eight strategies outlined in part five of the DEI Plan (under services and service delivery) will guide that process. Initial implementation of the DEI Plan began after adoption in July 2022.

# Funding

Future funding will continue to support Cherriots in transforming the region’s mobility and achieve Cherriots current and future service goals. A variety of funding sources will allow for Cherriots to be eligible for projects by allowing us to pursue capital and operations activities. Cherriots will remain competitive for discretionary funds by ensuring growth and investments reflect plans and are sustained by broad public support.

Cherriots is developing funding forecasts in 2023 to reflect expected short- and long term growth and operating costs. Transit ridership and services are still evolving post-pandemic and Cherriots is working closely with

stakeholders to determine resource needs and availability. Cherriots forecasts will reflect the potential for new local funding authorized by the State Transportation Improvement Fund (STIF).

The 2021 Infrastructure Investment and Jobs Act authorized \$1.2 trillion in funding for transportation and infrastructure. There are several grant programs open to Cherriots, including Infrastructure for Rebuilding America, National Infrastructure Project Assistance, and Safe Streets and Roads for All. Cherriots will remain competitive for discretionary funds by ensuring that growth and investments reflect plans and are sustained by broad public support.

**Table 9. Potential revenue sources**

Funding	Description
<i>Local and State Funding</i>	
<b>State Transportation Improvement Fund (STIF)</b>	This ODOT program aims to increase equity and affordability by supporting reduced-fare programs, expanded service coverage, and increase service frequency to low-income neighborhoods. This program will be combined with the Special Transportation Fund in July 2023 and will maintain or increase funding for seniors and people with disabilities.
<b>State Transportation Improvement Program (STIP) Enhance Program</b>	Provides funding to projects that enhance, expand, or improve the transportation system. Local match is typically 20% and may vary.
<b>Employer payroll tax</b>	Progressive tax imposed on employer. The Cherriots Board will have authority to levy this tax beginning in 2026. In January, 2022, TriMet had an annual tax rate of 0.7937% and Lane Transit District (LTD) had an annual tax rate of 0.77%. LTD will increase the tax rate by 0.01 points each year, capping at 0.80% at 2025. As an example, the combined annual payroll for Marion County in 2020 was \$5.5 billion. A countywide payroll tax of 0.50% would yield \$17 million in 2022 dollars, or 43% of Cherriots’ 2020 revenues.
<b>Public-private Partnerships</b>	Mutually beneficial agreement between public and private entities. Examples for transit include developers investing in transit centers for a share of retail or residential space, or funding transit service on routes connecting new development that also have direct general public benefits.

Funding	Description
<i>Federal Programs</i>	
<b>FTA 5307 Urbanized Area Formula Grants</b>	The primary operations funding source for Cherriots Local in the Salem-Keizer urbanized area. Resources available for transportation-related operations, capital, and planning activities.
<b>FTA 5310 Enhanced Mobility of Seniors and Individuals with Disabilities</b>	Provides transportation services for older adults and people with disabilities. Local match is 20% for capital projects and 50% for funds used for operations.
<b>FTA 5311 Formula Grants for Rural Areas</b>	Capital, planning, and operations assistance supporting public transportation in communities with populations less than 50,000. Supports Cherriots Regional routes.
<b>FTA 5339 Buses and Bus Facilities Grants Program</b>	Funds can be used to replace, rehabilitate, and purchase transit vehicles and related equipment. Local match is 20% for capital projects.
<b>FTA 5309 Fixed Guideway Capital Investment Grants</b>	Capital funding for Cherriots urbanized area. Provides capital assistance for modernization of existing infrastructure, new and replacement buses and facilities, and transit guideway facilities.
<b>FTA 5304 Planning</b>	Provides funding and procedural requirements for multimodal transportation planning in metropolitan areas and states.





Prepared by

**Jacobs**

Portland, Oregon 2022  
with Fehr and Peers and JLA Public Involvement

For more information visit our project website:

[www.cherriots.org/projects/Long Range Transit Plan](http://www.cherriots.org/projects/Long Range Transit Plan)



**To:** Board of Directors

**From:** Allan Pollock, General Manager

**Date:** December 15, 2022

**Subject:** Contract Award for Legislative Advocacy Services

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**ISSUE**

Shall the Board authorize the General Manager to execute a contract with CFM Advocates for state and federal legislative advocacy services?

**BACKGROUND AND FINDINGS**

The District's current contract for state and federal legislative advocacy services expires on December 31, 2022. The District is desirous of continuing to engage with a firm to assist the District in providing coordinated state and federal legislative representation services in support of the District's legislative agenda.

The selected firm will assist in efforts for collaborative projects, legislative issue management, prepare annual grant requests, assist in developing the annual legislative agenda, and coordinate visits with the state and federal delegations, departments, and agencies.

On October 3, 2022 the District issued Request for Proposal (RFP) #22-031 for legislative advocacy services. The proposal was entered into the OregonBuys procurement network to a total of 78 interested parties who the solicitation was sent to through the OregonBuys automatic notification process.

Two proposals were received and both proposals were deemed to be qualified and responsive bidders. The proposals were reviewed by a source evaluation committee (SEC) comprised of the Deputy General Manager, Strategic Initiatives Manager, and myself. The Contracts and Procurement Manager assisted the committee.

The SEC scored CFM Advocates as the highest qualified bidder. The SEC scoring summary is below:

	<b>Category A</b>	<b>Category B</b>	<b>Category C</b>	<b>Category D</b>	<b>Total</b>
CFM Advocates	34.0	33.0	19.0	6.0	92.0
PAC/WEST	25.3	25.3	11.7	10.0	72.3

Category A: Qualifications & Experience of Firm and Staff (35 points)

Category B: Approach & Methodology (35 points)

Category C: Transit & Transportation Experience (20 points)

Category D: Price Proposal/Cost (10 points)

The proposed agreement is for a five-year term with two additional one-year options to renew if it is determined in the best interest of the District, for a maximum term of seven (7) years.

### **FINANCIAL IMPACT**

The District annually budgets funds for legislative advocacy services in the general fund – general managers division. There are adequate funds budgeted in the FY 23 budget. Future years will be budgeted during the annual budget development process. CFM Advocates Price Proposal is below:

<b>Year</b>	<b>Total</b>
2023	\$ 164,280
2024	\$ 164,280
2025	\$ 164,280
2026	\$ 164,280
2027	\$ 164,280
2028 (Option Year)	\$ 164,280
2029 (Option Year)	\$ 164,280
<b>Total</b>	<b>\$1,149,960</b>

### **RECOMMENDATION**

The SEC recommends the Board authorize the General Manager to execute a seven year contract (five base years + two option years) with CFM Advocates for legislative advocacy services for a not-to-exceed amount of \$1,149,960.

### **PROPOSED MOTION**

**I move that the Board authorize the General Manager to execute a seven year contract (five base years + two option years) with CFM Advocates for legislative advocacy services for a not-to-exceed amount of \$1,149,960 (One million, one hundred and forty-nine thousand, nine hundred and sixty dollars).**





**To:** Board of Directors

**From:** Steve Dickey, Director of Technology and Program Management

**Thru:** Allan Pollock, General Manager

**Date:** December 15, 2022

**Subject:** Contract Award for Environmental Review, Design and Engineering, and Construction Support Services for the South Salem Transit Center Project

---

## ISSUE

Shall the Board authorize the General Manager to execute a contract with *PIVOT Architecture*, for the provision of environmental review, property acquisition assistance, design and engineering, and construction management services, for a not to exceed amount of \$1,700,000?

## BACKGROUND AND FINDINGS

The District completed a site selection process for the development of the South Salem Transit Center (SSTC) in June 2022. The Board then made a decision to select one site from the study to pursue the next steps for conducting an environmental review as required by the Federal Transit Administration (FTA). Following a notice of concurrence and Finding of No Significant Impact (FONSI) from the FTA, the District will be able to proceed with the process to acquire the property, design and engineer the SSTC, and construct the facility. For these activities to be completed, a firm must be brought under contract to provide these services, including support during construction. Due to the need to not proceed beyond the environmental review phase of this project, until concurrence and a FONSI, this project will proceed with a notice to proceed through the first phase, and then authorize Option 1, and Option 2 when prerequisite phases have been completed. No work on future phases will be allowed until authorization has been granted by the District.

On June 23, 2022, a Request for Proposals (RFP) was released, seeking proposals to provide these services. The deadline for proposals was August 1, 2022. Two proposals were received - one from *Parametrix Engineering, Planning, Environmental Sciences*, and

one from *PIVOT Architecture*. These proposals were reviewed by Procurement staff for responsiveness; and then the Source Evaluation Committee (SEC) reviewed the proposals, conducted interviews with both firms, and scored the proposals based on the information in the proposals, responses to clarifying questions, and the interviews. These proposals were evaluated on a qualifications basis only, as is required by FTA under the guidance of the Brooks Act. Both firms were highly qualified, and the District has significant experiences with these firms and many of their subcontractors. After a thorough process, the SEC selected *PIVOT Architecture* as the apparent winner of the contract.

Upon completion of this process, the cost proposal was reviewed by Procurement staff and the project manager. The total cost was determined to be fair and reasonable in the current market for like services. The not to exceed amount requested includes the initial phase, plus Option 1 and Option 2. These options will not be exercised until prerequisite activities and authorizations have been completed, and funding has been authorized.

The cost breakdown for the initial and two option phases are shown in the following table:

<b>Phase</b>	<b>Tasks</b>	<b>Cost</b>
Initial Phase	Pre-Design Planning Schematic Design Environmental Review and Determination	\$469,082
Option 1 Phase	Property Acquisition Design Development Construction Documents	\$790,651
Option 2 Phase	Permit Application Bidding Construction Administration Post Construction / Warranty / Closeout	\$440,267
<b>Total</b>		<b>\$1,700,000</b>

## **FINANCIAL IMPACT**

Funding for this proposed contract is included in the Capital Projects Budget of the Districts' Adopted FY2023 Budget. Subsequent years will be approved as part of the annual district budget process as funds are available.

Total funds available for this phase of the SSTC project are listed in Table 1:

**TABLE 1**

<b>FUND SOURCE</b>	<b>GRANT PERCENTAGE</b>	<b>MATCH PERCENTAGE</b>	<b>GRANT AMOUNT</b>	<b>MATCH AMOUNT</b>	<b>TOTAL</b>
FTA – STP5307	89.73%	10.27%	\$ 44,807	\$ 5,128	\$ 49,935
FTA – 5339a	80%	20%	\$ 1,018,925	\$ 254,732	\$ 1,273,657
ODOT STIF Discretionary	80%	20%	\$ 600,000	\$ 150,000	\$ 750,000
			<b>Grand Total</b>		<b>\$ 2,073,592</b>

**RECOMMENDATION**

Staff recommends that the Board authorize the General Manager to execute a contract with PIVOT Architecture, for the provision of environmental review, property acquisition assistance, design and engineering, and construction management services, for a not to exceed amount of \$1,700,000.

**PROPOSED MOTION**

**I move that the Board authorize the General Manager to execute a contract with PIVOT Architecture, for the provision of environmental review, property acquisition assistance, design and engineering, and construction management services, for a not to exceed amount of \$1,700,000 [One million, seven hundred thousand dollars].**





**To:** Board of Directors

**From:** Stephen Dickey, Director of Technology and Program Management  
David Trimble, Deputy General Manager

**Thru:** Allan Pollock, General Manager

**Date:** December 15, 2022

**Subject:** Approval of the Statewide Transportation Improvement Fund Formula Program Application for 2024-2025 Biennium

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## ISSUE

Shall the Board approve the 2024-2025 biennium Statewide Transportation Improvement Fund - Formula Fund program projects, identified in **Attachment A**, for a total amount of \$24,522,087?

## BACKGROUND AND FINDINGS

During the 2020 Legislative Session, Senate Bill 1601 passed directing the Oregon Department of Transportation (ODOT) to consolidate the Statewide Transportation Improvement Fund (STIF) and Special Transportation Fund (STF) programs into the STIF program. As part of the rule making process following the passage of SB 1601, ODOT formed a Rules Advisory Committee (RAC) tasked with assisting in the drafting of the Administrative Rules to govern the revised STIF program. The committee carried the responsibility to ensure the provisions of both the STIF and STF programs, and their intended beneficiaries, would be included in the revised STIF program. The RAC held several meetings, worked with ODOT staff to draft the new rules, and in January 2022, the Oregon Transportation Commission (OTC) adopted the new rules.

As a result, the former STF and STIF programs have now been merged into one STIF program and planning process. The 2024-2025 biennium is the first biennium with a combined process. The revised STIF planning process now identify which projects are targeted to benefit older adults and persons with disabilities. These were projects formerly funded through the STF program.

STIF project plans (ODOT – Public Transit Division’s terminology for applications in the STIF program) were received from four Public Transportation Service Providers (PTSP), with a total of twelve projects requesting STIF funding. A summary of the PTSP’s requests for funding are shown in **Attachment A**. Tasks showing a zero dollar amount in the 2024-2025 Biennium Request column are funded with reserves and carry-forward revenues from the previous biennium.

The Statewide Transportation Improvement Fund Advisory Committee (STIFAC) met on November 15, 2022 to review and make a recommendation to fund a list of projects in Marion and Polk counties. Due to STIF revenues being higher than the state economic forecast, ODOT – Public Transit Division (PTD) requested that PTSPs request STIF funding 20% higher than what had been projected in September 2022. The total request in Attachment A includes the additional 20% as requested by ODOT-PTD.

Using these funds for these projects will grow and improve public transit services in Marion and Polk counties and enhance the ability to serve the needs of the community. The purpose of the STIF program is to enhance transit service throughout the state and provide a stable source of revenue to continue with those improvements for many years to come.

## **FINANCIAL IMPACT**

There is no financial impact in the current budget. If these projects are approved for funding, the approved amount will be included in the appropriate budget year for the projects for the District, and respectively for other PTSPs in Marion and Polk Counties.

## **RECOMMENDATION**

The STIFAC recommends the Board approve the 2024-2025 biennium Statewide Transportation Improvement Fund - Formula Fund program projects, identified in Attachment A, for a total amount of \$24,522,087.

## **PROPOSED MOTION**

**I move that the Board approve the 2024-2025 biennium Statewide Transportation Improvement Fund - Formula Fund program projects, identified in Attachment A, for a total amount of \$24,522,087 [Twenty-four million, five hundred and twenty-two thousand, and eighty-seven dollars].**

# ATTACHMENT A

## 2024-2025 STIF Project Request Summary

2024-2025 Biennium

PTSP	Project	Task	STIF Request
West Valley Health Foundation	West Valley Connections Van	Operating Assistance for demand response service to access medical services in western Polk County.	\$60,207
<b>PTSP Total West Valley Health Foundation</b>			<b>\$60,207</b>
<b>City of Silverton</b>	1) City of Silverton, Silver Trolley 5311 Match	1) Local match for FTA Section 5311 grant that supports the operation of the demand response Silver Trolley service.	\$47,571
	2) Silverton Transit Expansion	1) Implement service expansion as identified in the Transit Study. Tasks will include hiring a Transit Coordinator/Driver position and expanding transit service. 2) Reserve fund will be used to preserve City of Silverton's transit services and possible vehicle acquisition pending the results of the service expansion study. This task will be funded with carryforward funds that went unspent due to the pandemic.	\$404,728
<b>PTSP Total City of Silverton</b>			<b>\$452,299</b>
<b>City of Woodburn</b>	1) WTS Weekend, Expanded Weekday, Medical Services	1) Fixed Route Weekend Service: operates within city limits on Saturdays, 9:00 a.m.-5:00 p.m., and Sundays, 9:00 - 3:00 p.m. This task provides resources for drivers, service coordination, administration, vehicle maintenance, fuel, overhead, and necessary supplies. 2) Demand Response Weekend Service: operates within city limits on Saturdays, 9:00 a.m.- 5:00 p.m., and Sundays, 9:00 - 3:00 p.m. This task provides resources for drivers, service coordination, administration, vehicle maintenance, fuel, overhead, and necessary supplies. 3) Express Weekday (Expanded Weekday): a fixed route 30-minute city-wide loop that makes fewer, high frequency stops that offers passengers a transportation alternative to the City's 60-minute Fixed Route loop. Operates Monday through Friday, 8 a.m.-6 p.m. The Express Route is a popular and familiar service. Ridership has grown over the past 2.5 years of the pandemic when the Express Route served as the City's primary weekday fixed route. This task provides resources for drivers, service coordination, administration, vehicle maintenance, fuel, overhead, and other necessary supplies.	\$78,100
			\$92,400
			\$445,500

# ATTACHMENT A

## 2024-2025 STIF Project Request Summary

2024-2025 Biennium  
STIF Request

PTSP	Project	Task	STIF Request
		4) Out of Town Medical Transportation: demand response service provides transportation to Woodburn's disabled and elderly residents who are unable to use the City's Fixed Route transit services. Drivers transport passengers to out-of-town medical appointments at northern medical facilities in Portland and southern medical facilities in Salem. Out-of-Town Medical Transportation is a popular service and provides a crucial transportation option to vulnerable residents. This task provides resources for drivers, service coordination, administration, volunteer mileage reimbursements, vehicle maintenance, fuel, overhead, and other necessary supplies. Prior biennia funding carry forward is primarily due to a STIF Intercommunity grant award that provided service funding during FY21-23	\$118,000
	2) Vehicle Purchases	1) Replace vehicle(s) used in City Demand Response and Fixed Route services.	\$82,000
	3) Fareless Rides	1) This task allows City Weekday and Weekend Demand Response services to remain fareless for all passengers. 2) This task provides resources for fareless rides on the City's Express, Fixed Weekday, and Weekend routes.	\$24,000
	4) Weekday Demand Response & Fixed Service	1) This task provides resources for Woodburn's Fixed Route operations including drivers, dispatch, administration, vehicle maintenance, fuel, overhead, and necessary supplies. 2) This task provides resources for the City's Demand Response operations including drivers, dispatch, vehicle maintenance, administration, fuel, overhead, and necessary supplies.	\$58,000
		Reserve funds will be used to preserve the City's Fixed route and Demand Response services. A portion of Reserves may be used to support the rising costs of operations and capital expenditures affected by inflation. If one or more vehicles is needed for the Transit fleet, a portion of Reserves will be used for the purchase. Reserves will be used to purchase needed bus shelters. Prior biennia reserves will provide matching funds for vehicle purchases and operational needs. Funding carry forward is primarily due to vehicle delivery delays in FY21-23.	\$208,000
	5) Reserves		\$176,000
			\$415,920



# ATTACHMENT A

## 2024-2025 STIF Project Request Summary

2024-2025 Biennium  
STIF Request

PTSP	Project	Task	STIF Request
	6) Reserves (formerly STF)	1) A portion of Reserves may be used to support the rising costs of operations and capital expenditures affected by inflation. Reserve funds will be used to preserve the City's Fixed Route and Demand Response services affecting seniors and persons with limited mobility, including Out-of-Town Medical Transportation, Weekend Fixed and Demand Response and Express. If one or more vehicles is needed for the Transit fleet, a portion of Reserves will be used for the purchase. Reserves may be used to purchase needed bus shelters.	\$205,887
<b>PTSP Total City of Woodburn</b>			<b>\$1,903,807</b>
<b>Salem Area Mass Transit District (SAMTD)</b>	1) Cherriots Local/1X/LIFT	1) Local and 1X Cherriots Local Commuter Express services. 1. Maintain Local Weekday and 1X/Cherriots Local Commuter Express Weekday service. 2. Maintain Local Saturday, Sunday, and Holiday service. 3. Add Route 22 service. Route 22 is a new route connecting south Salem to Aumsville Highway using Kuebler Blvd. The service will operate Monday through Friday with 15-minute service mornings and afternoons, and 30-minute service in the evenings. It will operate on Saturdays, Sundays, and holidays with 30-minute service throughout the day. The new service equates to approximately 17,100 new revenue hours for the biennium.	\$12,968,968
		2) Local Youth Zero Fare Program. This program subsidizes fares, allowing youth, ages 0-18 to ride for free, which reduces barriers and increases access.	\$0
		3) LIFT service. This task provides resources that allow SAMTD to provide paratransit service during all hours of local service, including local service expansions, to meet the requirements of the Americans with Disabilities Act.	\$1,470,711
		4) Reserves - Local/LIFT. Reserves will ensure SAMTD's ability to maintain services and cover unprecedented cost increases. Reserves will be funded with funds from the prior biennium; unspent funds were largely due to COVID19 disruptions. The reserves will support Cherriots Local/1X and LIFT operations and capital needs, addressing uncertainties such as the effects of the COVID-19 pandemic, cost increases related to market volatility, supply chain issues, and availability of raw materials.	\$2,539,367

**ATTACHMENT A**

**2024-2025 STIF Project Request Summary**

**2024-2025 Biennium  
STIF Request**

PTSP	Project	Task	STIF Request
		5) Construction of 17 new local stops. This task includes all costs associated with the construction of new stops and shelters (e.g., preliminary engineering and design, construction, project management, etc.) for the new Route 22 and for Routes 4, 12, and 13.	\$0
		6) Comprehensive Operational Analysis. SAMTD will hire a consultant to examine and evaluate our transit system as a whole to determine where improvements can be made to make our operations more effective and efficient.	\$0
	2) Regional	1) Cherrriots Regional Fixed Route Service. Maintain the Cherrriots Regional fixed route service that was expanded in the previous biennium, which provided service on weekdays and Saturdays.	\$1,677,058
		2) Regional Stop and Shelter Facilities Preventive Maintenance. Personnel and supply costs to maintain all Cherrriots Regional stops and shelters with cleaning and upkeep of stops and shelters.	\$200,000
		3) Regional Youth Zero Fare Program. This program subsidizes fares, allowing youth, ages 0-18 to ride for free, which reduces barriers and increases access.	\$64,608
		4) Reserves - Regional. These reserves will ensure SAMTD's ability to maintain Regional services and cover unprecedented cost increases. Reserves will be funded with funds from the prior biennium; unspent funds were largely due to COVID-19 disruptions. The reserves will support Cherrriots Regional operations and capital needs, addressing uncertainties such as the effects of the COVID-19 pandemic, cost increases related to market volatility, supply chain issues, and availability of raw materials.	\$964,858
		5) Non-Revenue Maintenance Vehicle. This vehicle will support the regular cleaning and maintenance of the Regional stops and shelters. The proposed vehicle would be a Chevrolet 2500HD or equivalent, equipped with a water tank and pressure washer to allow for cleaning of stops, shelters and pads; tools to perform shelter locating or shelter glass replacement; mounted tool box with hand tools; and other equipment such as brooms and shovels.	\$0
		6) Regional Fare Unification. This task subsidizes a portion of the Regional fares to be equal to Local fares for all passengers, reducing barriers to transportation and increasing ridership.	\$205,460
	3) Population-based Funded Projects	1) Admin - Administrative costs to manage the program. This task provides resources for SAMTD to monitor, manage, and evaluate PTSPs in order to effectively serve as the QE.	\$4,000

# ATTACHMENT A

## 2024-2025 STIF Project Request Summary

2024-2025 Biennium  
STIF Request

PTSP	Project	Task	
		<p>2) Mobility Management - operational costs and match. This task provides funding for the portion of operational costs of the Mobility Management Program that was traditionally funded with population-based STF funds. The match amount is a conservative estimate and will be used for anticipated ODOT 5310 funds. The Mobility Management Program is an approach for managing and delivering coordinated transportation services to customers, including seniors, people with disabilities, and individuals with lower incomes. As part of the Mobility Management Program, the mobility coordinator attends community meetings in the 16 surrounding rural communities which are served by Cherriots Regional as well as urban communities in order to educate community partners on public transportation services and programs. This helps to ensure that duplication is minimized and that access and utilization are maximized. SAMTD also collaborates with Marion County to provide LIFT services for rehabilitation and work programs for individuals with disabilities.</p>	\$131,718
		<p>3) Regional - operational costs and match. This task provides funding for the portion of operational costs of the Regional service that was traditionally funded with population-based STF funds. The match amount requested is a conservative estimate of what will be needed to match anticipated ODOT 5310 funds. Cherriots Regional provides service to 17 rural areas surrounding Salem and Keizer in Marion, Polk, and a small portion of Linn counties. This service allows seniors and individuals with disabilities in these areas to access medical services, education, employment, shopping, and recreational opportunities in and around their communities. The cities of Dallas and Woodburn which have the largest concentrations of seniors in Marion and Polk counties are served by Cherriots Regional. There are two routes serving Dallas and two routes serving Woodburn to increase transit options for seniors and individuals with disabilities. All Regional vehicles are ADA-accessible. The vehicles seat between 14 and 35 people and are capable of carrying up to two mobility devices. Seniors and individuals with disabilities are given reduced fares of approximately two-thirds of the regular Regional fares. Many seniors and individuals with disabilities who live outside of the Cherriots LIFT (the complementary ADA paratransit service) service area use Cherriots Regional to access the Cherriots LIFT service area.</p>	\$1,181,034

**ATTACHMENT A**

**2024-2025 STIF Project Request Summary**

**2024-2025 Biennium  
STIF Request**

PTSP	Project	Task	STIF Request
		<p>4) Shop &amp; Ride Operations - operational costs and match. This task provides funding for the portion of operational costs of the Shop &amp; Ride service that was traditionally funded with population-based STF funds. The match amount requested is a conservative estimate of what will be needed to match anticipated ODOT 5310 funds. Cherriots Shop and Ride is specifically for seniors and individuals with disabilities within the Salem/Keizer urban growth boundary. Riders are picked up from their homes and taken to any destination within the Salem-Keizer urban growth boundary. All buses are ADA-accessible and can accommodate mobility devices. There is no application required. Service is available Monday through Friday 8:00 am - 5:15 pm and medical appointments are given priority. Trips are booked through the Cherriots call center and can be booked up to 14 days in advance.</p>	\$206,670
		<p>5) LIFT Operations - operational costs and match. This task provides funding for the portion of operational costs of the Cherriots LIFT service that was traditionally funded with population-based STF funds. The match amount requested is a conservative estimate of what will be needed to match anticipated ODOT 5310 funds. Cherriots LIFT is an origin-to-destination, shared-ride, complementary paratransit transportation service for individuals who are unable to use the Cherriots Local bus service because of their functional ability. Cherriots LIFT service covers all locations within the Salem-Keizer urban growth boundary. Individuals can qualify for Cherriots LIFT for some or all of their trips. Cherriots Local and Cherriots LIFT operate the same hours and days of the week. Reservations are required. Cherriots LIFT is currently operated Monday-Friday from 5:50 am to 9:00 pm, Saturdays from 6:00 am to 9:00 pm, and Sundays from 8:00 am to 8:00 pm. Customers can schedule a trip up to two weeks in advance and at least 24 hours in advance by calling the Cherriots Call Center. The Cherriots Call Center operates Monday-Friday 6:00 am-6:00 pm and Saturday-Sunday 8:00 am-4:00 pm.</p>	\$491,322
4) South Salem Transit Center		<p>1) SSTC Land Acquisition. This task includes all costs associated with procuring land for the South Salem Transit Center. Funds could also be used as match for federal grants for the SSTC. SAMTD anticipates using the majority of other state funds (STIF discretionary grant 35080) and a federal grant (5339a) with pre-acquisition activities such as preliminary design, NEPA documents, consultant support with the acquisition, and the full design and engineering, and bid documents.</p>	\$0

**ATTACHMENT A**

**2024-2025 STIF Project Request Summary**

**2024-2025 Biennium  
STIF Request**

PTSP	Project	Task	
		2) SSTC Construction. This task provides funding for costs associated with property development and design, construction, infrastructure, permitting, and inspection. Funds could also be used as match for federal grants for the SSTC. SAMTD is actively applying for funding for construction and does not have additional funds identified at this time.	\$0
<b>PTSP Total for SAMTD</b>			<b>\$22,105,774</b>

**Total Qualified Entity Plan that includes all PTSP Plans**

**\$24,522,087**





**To:** Board of Directors

**From:** Stephen Dickey, Director of Technology and Program Management  
David Trimble, Deputy General Manager

**Thru:** Allan Pollock, General Manager

**Date:** December 15, 2022

**Subject:** Adoption of Resolution No. 2022-07 to approve Federal Section 5310 through ODOT Projects for the 2024-2025 biennium

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## ISSUE

Shall the Board adopt Resolution No. 2022-07 to approve the federal Section 5310 (through ODOT) Projects for the 2024-2025 biennium?

## BACKGROUND AND FINDINGS

The District is the Qualified Entity designated by Oregon State Statute to receive recommendations from the Statewide Transportation Improvement Fund Advisory Committee (STIFAC) for funding grant projects located in Marion and Polk Counties in accordance with Oregon Department of Transportation (ODOT) recommended grant application process. Every two years ODOT releases applications for federal Section 5310 (through ODOT) grants. These applications support transportation for seniors and people with disabilities in Marion and Polk Counties.

The STIFAC is a Board-appointed committee that is responsible to review and rank the applications, and form recommendations for funding with each solicitation released by ODOT. The STIFAC received three applications for Section 5310 (ODOT) funds.

The STIFAC met in a public meeting on November 15, 2022 where the applicants had the opportunity to present their projects and answer questions from committee members. The committee consisted of the STIFAC members, and one representative of the Mid-Willamette Valley Council of Governments (MWVCOG).

A summary of the projects requesting funding are shown below in **Table 1**.

**TABLE: 1 – Project Requests**

<b>Applicant</b>	<b>5310 Project Description</b>	<b>Project Total Request</b>	<b>Local Match</b>	<b>Grant Amount</b>
SAMTD	Mobility Management, Purchased Service (CherriotsLift, Shop and Ride, and Regional), Preventative Maintenance for Cherriots Regional	\$2,616,156	\$268,679	\$2,347,477
City of Woodburn	Mobility Management, Preventative Maintenance	\$306,000	\$31,435	\$274,575
City of Silverton	Preventative Maintenance	\$11,500	\$1,181	\$10,319

Using the Federal 5310 (ODOT) funds for these projects will grow and improve public transit services in and around Marion and Polk counties, and enhance the ability to serve the needs of the community.

**FINANCIAL IMPACT**

There is no financial impact in the current budget. If these projects are approved for funding, the approved amount will be included in the appropriate budget year for the projects for the District, and respectively for other PTSPs in Marion County.

**RECOMMENDATION**

The Statewide Transportation Improvement Fund Advisory Committee recommends the Board adopt Resolution No. 2022-07 to approve the Federal Section 5310 (through ODOT) Projects for the 2024-2025 biennium.

**PROPOSED MOTION**

**I move that the Board adopt Resolution No. 2022-07 to approve the Federal Section 5310 (through ODOT) Projects for the 2024-2025 biennium.**





## Resolution No. 2022-07

### Approval of 2024-2025 Biennium Federal Section 5310 Projects For Salem Area Mass Transit District STIF Qualified Entity (QE) Area

**WHEREAS**, Salem Area Mass Transit District (District) is designated the STIF Qualified Entity for Marion and Polk Counties under ORS 391.800 and OAR 732-005-0010 (29); and,

**WHEREAS**, the District is required to conduct a review of projects submitted for funding from the Federal Section 5310 eligible entities within the QE Area of Responsibility; and,

**WHEREAS**, as a result of the review, will take action identifying which projects to recommend for funding; and,

**WHEREAS**, Table 1 attached to this resolution contains the projects and project costs for projects proposed for funding through the Federal Section 5310 Programs for the 2024-2025 biennium;

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

**THAT**, Resolution No. 2022-07 be adopted to approve the list of projects and funding amounts identified in Table 1 attached to this resolution; and

**THAT** a record of the decision by the Board of Directors be submitted by the General Manager by January 20, 2023; as is required by the Oregon Department of Transportation.

**ADOPTED** by the Board of Directors on the 15th day of December 2022, and effective thereupon.

**ATTEST:**

\_\_\_\_\_  
Ian Davidson, Board President

\_\_\_\_\_  
Linda Galeazzi, Recording Secretary

**RESOLUTION 2022-07 continued ...**

**TABLE: 1 – Project Requests**

<b>Applicant</b>	<b>5310 Project Description</b>	<b>Project Total Request</b>	<b>Local Match</b>	<b>Grant Amount</b>
SAMTD	Mobility Management, Purchased Service (CherriotsLift, Shop and Ride, and Regional), Preventative Maintenance for Cherriots Regional	\$2,616,156	\$268,679	\$2,347,477
City of Woodburn	Mobility Management, Preventative Maintenance	\$306,000	\$31,435	\$274,575
City of Silverton	Preventative Maintenance	\$11,500	\$1,181	\$10,319



## BOARD MEETING MEMO

Agenda Item G.6

**To:** Board of Directors

**From:** Gregg Thompson, Maintenance Manager  
Tom Dietz, Director of Operations

**Thru:** Allan Pollock, General Manager

**Date:** December 15, 2022

**Subject:** Authorize the General Manager to execute a construction contract with *EC Electric* to support the battery electric bus charging project at Del Webb.

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### ISSUE

Shall the Board authorize the General Manager to execute a construction contract with *EC Electric* to support the battery electric bus charging project at Del Webb for an amount not to exceed \$958,508?

### BACKGROUND AND FINDINGS

Through a competitive grant application process, the District was awarded two (2) consecutive Low-No grants in 2020 and 2021. Each grant award provided for five (5) battery electric buses, charging infrastructure, construction and project management costs. All ten (10) buses will be charged overnight via plug in dispensers at the Del Webb Maintenance facility.

Cherriots staff have been working closely with our engineering consulting firm, *Mott McDonald*, our project consultants, *CTE*, charger manufacturer, *ChargePoint*, bus manufacturer, *Gillig*, as well as internal working groups to identify the best manner in which to charge battery electric buses and the best location to place charging infrastructure. Together, a construction plan was identified that facilitated the best charging outcome.

The construction at Del Webb will include the demolition and excavation of the current concrete walkway, the installation of underground electrical infrastructure, installation of charging equipment, and final inspections. The construction will include provisions for six power blocks and 12 dispensers. Additionally, underground infrastructure will be added for up to eight additional charger dispensers.

Staff released an RFP on August 15, 2022. The RFP closed on September 20, 2022. Two bids were received that met all specifications. *EC Electric* was identified as the winning proposal.

EC Electric was the lowest bid by nearly \$200,000 and had no changes to the scope of work. EC Electric brings a wealth of similar project experience including installing bus charging stations at TriMet.

Total construction project cost was more than anticipated due to increased materials and labor costs. Because of these increases, an additional funding source was added as outlined below.

**FINANCIAL IMPACT**

This project is included as part of the Capital Projects section of the District’s Adopted FY2022/23 Budget.

Funding for the proposed contract is covered through FY20 Low-No 5339(c) and a FY21 Low-No 5339(c) grants, each with different match amounts.

Funds for the Del Webb battery electric bus construction project are listed in Table 1 below:

**TABLE 1**

<b>FTA FUND SOURCE</b>	<b>GRANT PERCENT AGE</b>	<b>MATCH PERCENTAGE</b>	<b>GRANT AMOUNT</b>	<b>MATCH AMOUNT</b>	<b>TOTAL</b>
2020 Low-No 5339(c)	75%	25%	\$100,413	\$33,471	\$133,884
2021 Low-No 5339(c)	85%	15%	\$407,365	\$71,889	\$479,254
5307	80%	20%	\$276,296	\$69,074	\$345,370
			<b>Grand Total</b>		<b>\$958,508</b>

**RECOMMENDATION**

Staff recommends that the Board authorize the General Manager to execute a construction contract with EC Electric to support the battery electric bus charging project at Del Webb for an amount not to exceed \$958,508.

**PROPOSED MOTION**

I move the Board authorize the General Manager to execute a construction contract with EC Electric to support the battery electric bus charging project at Del Webb for an amount not to exceed \$958,508 (Nine hundred fifty-eight thousand five hundred and eight dollars).



# BOARD MEETING MEMO

Agenda Item J.

**To:** Board of Directors

**From:** Allan Pollock, General Manager

**Date:** December 15, 2022

**Subject:** Board Member Committee Report

## 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 VACANT	Diversity, Equity, and Inclusion Committee West Salem Business Association
Subdistrict 2 Director Navarro	Keizer Chamber of Commerce Forum Keizer Chamber Government Affairs Committee State Transportation Improvement Fund Advisory Committee
Subdistrict 3 Director Carney	Salem-Keizer Area Transportation Study (SKATS)
Subdistrict 4 Director Hinojos Pressey	Citizens Advisory Committee
Subdistrict 5 President Davidson	Mid-Willamette Valley Council of Governments (MWVCOG) Mid-Willamette Area Commission on Transportation (MWACT) Salem Chamber Public Policy Committee
Subdistrict 6 Director Duncan	SEDCOR
Subdistrict 7 Director Holmstrom	