



Salem Area Mass Transit District
BOARD OF DIRECTORS VIRTUAL MEETING
Thursday, February 25, 2021 at 6:30 PM

PURSUANT TO GOVERNOR BROWN'S EXECUTIVE ORDER TO KEEP THE COMMUNITY SAFE DURING THE CONTINUING COVID-19 PANDEMIC EVENT, THIS MEETING WILL BE ONLINE ONLY. GO TO:

Join ZoomGov Meeting

<https://cherriots-org.zoomgov.com/j/1608361530?pwd=MHN5RGZ3a1FiTE5XSHIGdzYvRWpuUT09>

Zoom ID: **160 836 1530** | Passcode: **864458**

- Comcast Cable **Channel 21**
- Cherriots Facebook Live. **<https://www.facebook.com/cherriots/>**
- YouTube through CC:Media. . . **<https://www.capitalcommunitymedia.org/all>**

AGENDA

- A. CALL TO ORDER** (President Ian Davidson)
 - 1. Note of Attendance for a Quorum
 - 2. Pledge of Allegiance
 - 3. "Safety Moment"

- B. ANNOUNCEMENTS & CHANGES TO AGENDA**
This is the time for Board members to declare a (potential) conflict of interest prior to taking action on the agenda items below.

- C. PRESENTATION**

- D. PUBLIC COMMENT**

- E. CONSENT CALENDAR**
Items on the Consent Calendar are considered routine business 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. January 28, 2021 Board of Directors Meeting **3**
 - b. January 28, 2021 Work Session **11**
 - c. January 28, 2021 Executive Session (Potential Litigation) **13**

- F. ITEMS DEFERRED FROM THE CONSENT CALENDAR**

G. ACTION ITEMS

- 1. Resolution No. 2021-01 Amend Retirement Plan for Non-Represented Employees **15**
- 2. Resolution No. 2021-02 Approval of New Retirement Plan **19**
- 3. Resolution No. 2021-03 Approval of STF and FTA 5310 Projects **37**
- 4. Resolution No. 2021-04 Approval of STIF Discretionary and STN Projects **91**
- 5. Authorize the Purchase of Seven Buses for Cherriots Regional Service **161**

H. INFORMATIONAL REPORTS

- 1. FY 2021 Performance Report – First Quarter **163**
- 2. FY 2021 Trip Choice Report – First Quarter **193**
- 3. FY 2021 Finance Report – First Quarter **205**
- 4. Albany-Salem Feasibility Study Update **---**

I. GENERAL MANAGER'S REPORT

J. BOARD OF DIRECTORS REPORTS

- Board members report on their Board assignments as representatives of the District **213**

K. ADJOURN BOARD MEETING

PUBLIC COMMENT: For testimony on any Board business, send an email to: publictestimony@cherriots.org by 5:00 p.m., the day of the Board meeting; or by mail to Cherriots Board of Directors, 555 Court Street NE, Suite 5230, Salem, OR 97301. Testimony received will be acknowledged at the Board meeting and will be included in the minutes for public record.

Next Regular Board Meeting and Work Session Date: Thursday, March 25, 2021

This is a virtual public meeting that is ADA accessible. With 48 hours of notice, auxiliary hearing aids and services, and alternate formats are available to individuals with limited English proficiency. Requests can be made directly 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. For an electronic copy of the Board's agenda packet, go to www.cherriots.org/board.

Esta es una reunión pública virtual que es accesible para ADA. Con 48 horas de anticipación, los audífonos y servicios auxiliares y los formatos alternativos están disponibles para personas con dominio limitado del inglés. Las solicitudes se pueden hacer directamente al Secretario de la Junta por teléfono al 503-588-2424 o con la asistencia de TTY: Servicios de retransmisión de Oregon al 1-800-735-2900 (o 711). El horario de la oficina de administración de Cherriots es de lunes a viernes de 8:00 AM a 5:00 PM. Para obtener una copia electrónica del paquete de la agenda de la Junta, vaya a www.cherriots.org/board.



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.



Salem Area Mass Transit District
BOARD OF DIRECTORS
VIRTUAL MEETING

January 28, 2021

Pursuant to Governor Brown’s Executive Order issued in response to the COVID-19 pandemic, this meeting was held virtually in the following ways:

- Google Meet ID: meet.google.com/nfo-rihw-vut
- Phone: +1 617-675-4444 PIN: 359 451 873 4625#
- Cherriots Facebook Live: <https://www.facebook.com/cherriots>
- YouTube via <https://www.capitalcommunitymedia.org/all>
- Comcast Channel 21

Index of Board Actions

<u>Action</u>	<u>Page</u>
Moved to approve the Consent Calendar:	3
1. <u>Approval of Minutes</u>	
a. December 17, 2020 Board of Directors Meeting	
2. <u>Routine Business</u>	
a. Appointment of Michelle Roland-Schwartz to the Citizens Advisory Committee	
Adopt the 2021 Federal and State Legislative Agendas as shown in Attachments A and B respectively.	4
Approve the 2022-2023 biennium Statewide Transportation Improvement Fund - Formula Fund program projects, identified in Table 2, for a total amount of \$15,425,351.	5

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
 January 28, 2021
 Google Meet ID: meet.google.com/nfo-rihw-vut

MINUTES

PRESENT:	President Ian Davidson; Directors: Colleen Busch, Maria Hinojos Pressey, Chi Nguyen, Robert Krebs, Charles Richards, and Sadie Carney
Board	
Staff	Allan Pollock, General Manager; David Trimble, Deputy General Manager; Al McCoy, Chief Financial Officer; Patricia Feeny, Director of Communication; Paula Dixon, Director of Human Resources & Labor Relations; Steve Dickey, Director of Technology & Program Management; Tom Dietz, Director of Operations; Chris French, Service Planning Manager; Don Clifford, Transportation Manager; SueAnn Coffin, Contracted Services Manager; Karen Garcia, Security and Emergency Management Manager; Dan Knauss, Contracts and Procurement Manager; James Aguilar, Security Coordinator; Stephen Custer, Digital Marketing Coordinator; Linda Galeazzi, Executive Assistant; and Kathryn Pawlick, SAMTD Legal Counsel
Guests	Kirby Garrett, Dale Penn II, and Waylon Buchan from CFM Advocates, Portland, OR

A. CALL TO ORDER

6:30 PM

President Davidson called the meeting to order. Attendance was noted and a quorum was present. President Davidson led the Pledge of Allegiance.

Mr. Pollock shared a *Safety Moment* about the importance of continuing to protect oneself from the COVID virus by washing your hands, wearing a mask and walking, sitting or standing at least six feet apart.

B. ANNOUNCEMENTS AND CHANGES TO THE AGENDA - None

C. PRESENTATION - None

D. PUBLIC COMMENT -

President Davidson noted for the record that the Board received a letter from an anonymous transit operator, two week prior, who shared some concerns about increased verbal and physical confrontations with members of the public at the Downtown Transit Center. President Davidson said he asked the general manager to investigate the concerns and report back to the Board. President Davidson offered to meet with the individual one-on-one to discuss these concerns.



E. CONSENT CALENDAR

Shall the Board approve the Consent Calendar?

Presenter: President Davidson

Staff Report: 5-16 of the agenda

1. Approval of Minutes

a. December 17, 2020 Board of Directors Meeting

2. Routine Business

a. Appointment of Michelle Roland-Schwartz to the Citizens Advisory Committee

Motion: **Approve the Consent Calendar**

Motion By: **Director Colleen Busch**

Second: **Director Sadie Carney**

Vote: **Motion passed: Davidson, Nguyen, Busch, Hinojos Pressey, Carney, Krebs, Richards (7)**

F. ITEMS DEFERRED FROM THE CONSENT CALENDAR - None

G. ACTION ITEMS

1. Shall the Board adopt the proposed 2021 Federal and State Legislative Agenda?

Staff Report: Pages 17-22 in the agenda

Presenter: Director Colleen Busch, Legislative Committee
Kirby Garrett, CFM Vice-President, Federal Affairs
Dale Penn II, CFM State Affairs Partner,
Waylon Buchan, CFM State Affairs Counsel

Director Busch reported that the Board's Legislative Committee met on January 14, 2021 to review and prioritize proposed projects and policies for the 2021 draft federal and state legislative agendas. The Committee recommends that the Board adopt the federal and state legislative agendas for 2021.

Mr. Garrett gave a recap of the District's successes for federal grant requests and projects in 2020; and shared the expectations of the first 100 days for the federal administration with highlights of the November election. Mr. Garrett then reviewed the recommendations for support of the District's 2021 federal grant requests from pages 18-20 of the agenda to include the purchase of six transit-style vans or 20 foot buses, ten ADA paratransit bus replacements, and five zero emission battery-electric buses and associated equipment; the Kuebler Link Job Center Mobility Project; a new operations and maintenance center to house the District's entire fleet, and a Mobility-as-a-Service (MaaS) transit facility in south Salem; Policy issues to support included funding for the *Bus and Bus Facility (BBF) Program*; and extending and making permanent, the *Alternative Fuels Gas Tax Credit*.



Mr. Penn talked about Oregon’s 81st legislative session being 160 days with 3200+ bills to get through that include a vaccine rollout and COVID-19 response, social justice, equity and redistricting. Peter Courtney was elected Senate President for a tenth term. Tina Kotek was elected Speaker for a fifth term, and Representative McLain is the new co-chair of the Joint Transportation Committee.

Mr. Penn reviewed the Board’s Legislative Committee recommended priorities for projects and policies, on page 21 of the agenda, that include: preserving and maintaining funding for public transportation investments; the passage of statutory changes converting existing energy incentives tax credits into Clean Fuels credits; the COVID-19 impact on transit and monitoring the state’s responses to ensure transit access and interests are protected; keeping a close watch on opportunities to increase investments in electric vehicle transit infrastructure; and supporting legislative activity for Senate Bill 395 to increase required expenditures on footpaths and bicycle trails from one percent to five percent of amounts received from the State Highway Fund. Lesser priorities included monitoring the discussions and activities of the I-5 bridge replacement between Portland and Vancouver; the Transportation Network Company (TNC) legislation, the Volkswagen settlement, and support of the Oregon Transit Association’s legislative priorities for 2021.

Waylon Buchan was introduced as CFM’s new State Affairs Counsel. Mr. Buchan spoke about his legal background and what brought him to his new role at CFM. He spoke about the legislative hot topics that effect transit to include a bill that creates a series of obligations for employers to their employee classification and status, a bill regarding the workplace and use of marijuana, and a bill that would allow employees to hire a private attorney rather than going through the Bureau of Labor and Industry (BOLI). Mr. Buchan noted that OSHA’s temporary rules for safety measures during the COVID pandemic expire on May 5.

Motion: **Moved that the Board adopt the 2021 Federal and State Legislative Agendas as shown in Attachment A and B respectively.**
 Motion By: **Director Sadie Carney**
 Second: **Director Colleen Busch**
 Vote: **Motion passed: Davidson, Nguyen, Busch, Hinojos Pressey, Carney, Krebs, Richards (7)**

2. Shall the Board approve the 2022-2023 biennium Statewide Transportation Improvement Fund (STIF) Formula Fund program projects, for a total amount of \$15,425,351?

Staff Report: Pages 23-98 in the agenda

Presenter: Steve Dickey, Director of Technology and Program Management



Mr. Dickey reported that the Statewide Transportation Improvement Fund (STIF) application process was in its second funding cycle for fiscal years 2022 and 2023. The most recent revenue forecast from the State of Oregon for the biennium showed a total of \$15,425,351 for Marion and Polk counties. Three Public Transportation Service Providers (PTSP) requested STIF funding for twelve project plans. The project plans, as submitted, did not result in the full allocation of funding that was available. The PTSPs chose not to pursue the full amount but instead to put remaining program funds into a reserve if the funds were not spent. The STIF Advisory Committee met on January 13, 2021 to review the projects, and passed a motion to recommend that the Board approve the twelve projects and funding amounts identified in Table 2 (on pages 26-28 of the agenda), and allocate the remaining unallocated funding to the three PTSPs as additional program reserve.

Motion: **Moved to approve the 2022-2023 biennium Statewide Transportation Improvement Fund - Formula Fund program projects, identified in Table 2, for a total amount of \$15,425,351.**

Motion By: **Director Colleen Busch**

Second: **Director Robert Krebs**

Vote: **Motion passed: Davidson, Nguyen, Busch, Hinojos Pressey, Carney, Krebs, Richards (7)**

H. INFORMATION ITEMS - None

I. GENERAL MANAGERS REPORT

Mr. Pollock invited Karen Garcia, Security and Emergency Management Manager, to provide a report on security on District properties. Ms. Garcia spoke about unexpected events that impact service. Situations that staff dealt with in the past year during the COVID pandemic included the discovery of a suspicious package, a rally for the Black Lives Matter movement and the March for Floyd, the November elections and the inauguration. Jim Aguilar, Security Coordinator, gave an account of the suspicious package incident.

Service Planning Manager, Chris French, spoke about Cherriots partnering with Salem Health to coordinate the use of Cherriots LIFT transportation to get senior citizens and people with disabilities to the vaccination clinic at the Jackman Building. Mr. Pollock was appreciative of the importance in helping Cherriots' community partners.

Tom Dietz was introduced as the new Director of Transportation. Mr. Dietz talked about the recent snow event when it began to stick to the ground, and the work that is involved for the transit team behind the scenes with eight detours, two stuck buses, putting chains on the buses and kitty litter on the sidewalks and driveways to be safe.



Mr. Pollock recognized and thanked the District's Director of Finance. CFO Al McCoy for his service. Mr. McCoy will retire in February. Mr. McCoy responded with a story about his growing up as a country boy and going to the World's Fair when he was nine years old. It was the first time he saw public transit and he loved it. He thanked Mr. Pollock, the Board, Budget Committee, and the executive team for his experience working at Cherriots. He said he was looking forward to the next chapter in his life. He will take a break to work on himself and then look for a non-profit opportunity.

J. BOARD OF DIRECTORS REPORTS

Staff Report: Page 99 in the agenda

Director Krebs attended the Morningside Neighborhood Association meeting where information was shared about improvements being made on Reed Road and the development of 1,000 living units being built in that area. Director Krebs also attended transportation advocacy meetings for light rail, intercity passenger rail and AORTA.

Director Nguyen announced that the Diversity, Equity and Inclusive RFP for consulting services is now out on the street.

Director Busch attended and thanked the Board's Legislative Committee meeting for all of their hard work. She attended the SEDCOR awards ceremony, a sendoff for retiring Commissioner Sam Brentano who was a great transportation advocate, a Salem for Refugees meeting, the swearing in of new city councilors at the City of Keizer council meeting, Keizer Greeters, the Oregon Fair Housing Council meeting and the STIF Advisory Committee meeting.

Director Carney spoke about the SKATS meeting where there was discussion about the Transportation Impact Study and unified planning. She commented on the difficult circumstance in working with partners that have outdated transportation plans. She said federal funding is available that is not being used. ODOT is helping to change that outcome.

Director Richardson attended a neighborhood meeting regarding Costco's move to Kuebler Boulevard. The group asked him if there was any way that Cherriots could help. He also worked with Northwest Senior & Disability Services and disabled veterans.

President Davidson reported that the MWVCOG hired a new executive director, Scott Dodson. He advocated to support the reduction of greenhouse gases as they reviewed their legislative agenda. President Davidson and his wife are participating in the *Point In Time Count* on Saturday. He appointed Director Hinojos Pressey as an alternate to the City of Salem's "Our Salem" committee.



President Davidson invited the Board to recommend any items they would like to add to the agenda for future discussions.

K. BOARD MEETING ADJOURNED

9:00 PM

Respectfully Submitted

Ian Davidson, President



Salem Area Mass Transit District
Board of Directors
~ **VIRTUAL WORK SESSION** ~

Pursuant to Governor Brown’s Executive Order 20-16 issued in response to the COVID-19 pandemic, this meeting was held electronically via Google Meet.

Thursday, January 28, 2021
GOOGLE MEET Meeting ID: meet.google.com/nfo-rihw-vut
Phone: (US) +1 617-675-4444 PIN: 359 451 873 4625#

MINUTES

PRESENT: President Ian Davidson; Directors Robert Krebs, Chi Nguyen, Colleen Busch, Sadie Board
Carney, Maria Hinojos Pressey, and Charles Richards

Staff Allan Pollock, General Manager; David Trimble, Deputy General Manager; Al McCoy, Chief Financial Officer; Patricia Feeny, Director of Communication; Paula Dixon, Director of Human Resources & Labor Relations; Steve Dickey, Director of Technology & Program Management; Tom Dietz, Director of Transportation; Chris French, Service Planning Manager; and Linda Galeazzi, Executive Assistant

1. CALL TO ORDER 5:50 PM
President Ian Davidson called the work session to order at 5:50 p.m. Mr. Pollock shared the *Safety Moment* reminding people to use the Three W’s to reduce the effects of the COVID virus – wash your hands, wear your mask, and watch your distance. There were no announcements and a quorum was present.

2. PRESENTATION – None

3. DISCUSSION

A. 2020 Service Guidelines Document

Staff report: Pages 1-116 of the agenda

Presenter: Chris French, Service Planning Manager, Operations Division

Mr. French presented the Districts service guidelines for 2020. The guidelines steer the process for designing, evaluating, and modifying all types of Cherriots bus service in both the local and regional systems. Service planning is a biennial process that follows the biennial calendar of the Statewide Transportation Improvement Fund (STIF) for grant funding, and revenue forecasting. Major planning occurs in even-numbered years while implementation happens in odd-numbered years. Abbreviated planning takes place every four months in January, May and September for minor changes to the service.

Mr. French explained how the District gets feedback from riders, transit operators and community members about the location of a bus route, or the frequency or timing of a route; and how this feedback is used in the planning process. He expects that there will be dramatic changes after the COVID pandemic ends.

The Board considered how equity issues, quantifying service, the census and a needs assessment could impact planning decisions. Mr. French described their plans for community outreach, surveys and other projects to get feedback for a needs assessment in February. Discussion ensued about the investment in technology infrastructure to get more demographics, and Planning's use of a ridership modeling tool for stop level data. Planning has the software now, and staff are being trained to model route changes and the effects on ridership.

Board members discussed the use of express routes, the District's history providing express service, and the tradeoffs to consider. Transfers make it hard for a choice rider to wait for a bus, for example. Mr. French noted that the District did have an express route from Keizer Station to south Salem. In review, it was a long route, and did not have the right timing. As the District gains technology and the tools needed, staff can look at how to make that service work.

Board members spoke highly of the 2020 Service Guidelines. Director Busch said it was exhaustive and informative. President Davidson said it was a very approachable document and a wonderful read. Director Nguyen congratulated staff for their resourcefulness. Director Carney said it was a job well done and a great document.

4. GENERAL MANAGER COMMENTS

Staff report: Pages 117-118 of the agenda

Presenter: Allan Pollock, General Manager

Mr. Pollock reported that the Board will meet in a work session prior to the February 25th board meeting where they will have a discussion on collective bargaining. Action items of note for the board meeting will include a regional bus purchase, grant fund approvals, resolutions for non-bargaining retirement plans, and quarterly reports. On the calendar in February on Presidents Day, Cherriot's administration offices will be closed and there will be no bus service; but the District hopes to provide service on this holiday in the future.

5. WORK SESSION ADJOURNED

6:11 PM

Submitted by:

Linda Galeazzi, CMC

Executive Assistant/Clerk of the Board



Salem Area Mass Transit District
Board of Directors

~ **VIRTUAL EXECUTIVE SESSION** ~
Thursday, January 28, 2021

Google Meet ID: meet.google.com/awq-wqjn-vxi
Courthouse Square – Mill Creek Conference Room #5147
555 Court Street NE, Salem, Oregon 97301

MINUTES

No information shall be disclosed by the Board, staff or media present in executive session except to state the general subject of the session pursuant to ORS 192.660(4)

MEETING CALLED TO ORDER: 5:30 PM **ADJOURNED:** 5:45 PM

PRESENT:

Board

- President Ian Davidson
- Director Robert Krebs
- Director Charles Richards
- Director Colleen Busch
- Director Sadie Carney
- Director Chi Nguyen
- Director Maria Hinojos
Pressey

Staff

- Allan Pollock, General Manager
- David Trimble, Deputy General Manager | COO
- Tom Dietz, Director of Operations
-
- Spencer Rockwell, SDAO
- Katherine Pawlick, SAMTD Legal Counsel
- Ben Fetherston, SAMTD Legal Counsel
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-

UNDER THE AUTHORITY OF:

- 192.660(2)(h) Legal Counsel / Litigation

SPECIFIC ISSUES DISCUSSED: _____

Recording Secretary: Allan Pollock, General Manager



To: Board of Directors

From: Paula Dixon, Director of Human Resources and Labor Relations
David Trimble, Deputy General Manager

Thru: Allan Pollock, General Manager

Date: February 25, 2021

Subject: Adoption of Resolution No. 2021-01, Non-Bargaining Retirement Plan

ISSUE

Shall the Board adopt Resolution No. 2021-01 to approve an amendment to the current non-bargaining retirement plan to define eligible employees as those first hired before March 1, 2021 and for certain positions currently under recruitment?

BACKGROUND AND FINDINGS

The District established the Salem Area Mass Transit District Non-Bargaining Unit Retirement Plan, which is a form of a floor offset defined benefit retirement plan, effective January 1, 2002. The District now proposes to offer a new plan, and wishes to limit the current plan to employees hired before March 1, 2021, and certain positions that are currently under active recruitment.

As a result, it is necessary to redefine eligibility criteria for the existing and the new plan through this plan amendment.

FINANCIAL IMPACT

NA

RECOMMENDATION

Staff recommends the Board adopt Resolution No. 2021-01 amending the current “floor offset” non-bargaining retirement program to limit eligibility to those positions hired before March 1, 2021 and those as specified in this resolution.

PROPOSED MOTION

I move that the Board adopt Resolution No. 2021-01 amending the current “floor offset” non-bargaining retirement program to limit eligibility to those positions hired before March 1, 2021 and those specified in this resolution.

RESOLUTION #2021-01

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

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

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

WHEREAS, the Plan received a favorable determination letter from the IRS dated June 23, 2017.

WHEREAS, the District now wishes to limit the Plan to employees first hired before March 1, 2021, and also including the Director of Finance/CFO and the Contracted Services Manager if either is first hired before December 31, 2021.

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

THAT Resolution No. 2021–01 shall be adopted to direct that the Plan shall be amended by adopting the Amendment attached to this Resolution; and

THAT the General Manager shall be authorized and directed to execute the Amendment to the Plan to implement this Resolution, to be effective March 1, 2021.

ADOPTED BY THE BOARD OF DIRECTORS OF THE SALEM AREA MASS TRANSIT DISTRICT this 25th day of February, 2021.

President
Board of Directors

ATTEST:

Secretary
Board of Directors

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

PLAN AMENDMENT

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

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

Having reserved the right to do so, the Employer now wishes to amend the Plan to exclude employees first hired on or after March 1, 2021, with exceptions. This amendment shall be effective March 1, 2021.

1. Section 1.8 ("Employee") is amended to read as follows:
"Employee" – A regular (full-time and part-time) non-bargaining unit employee still employed as of the Effective Date or first hired after the Effective Date and before March 1, 2021, and also including the Director of Finance/CFO and the Contracted Services Manager if either is first hired before December 31, 2021."
2. In all other respects, the Plan shall remain the same.

This action is being taken pursuant to the authority granted to the General Manager by the Board of Directors of the District in Resolution No 2021-01.

Dated this 25th day of February, 2021.

SALEM AREA MASS TRANSIT DISTRICT

By _____

Allan Pollock, General Manager

EMPLOYER

ACCEPTED:

PIONEER TRUST BANK, N.A.

By _____
Its Trust Officer

TRUSTEE



BOARD MEETING MEMO

Agenda Item G.2

To: Board of Directors

From: Paula Dixon, Director of Human Resources and Labor Relations
David Trimble, Deputy General Manager

Thru: Allan Pollock, General Manager

Date: February 25, 2021

Subject: Adoption of Resolution No. 2021-02, Approval of New Non-Bargaining Retirement Plan

ISSUE

Shall the Board adopt Resolution No. 2021-02 to authorize the proposed new plan design for a Defined Contribution Retirement Plan for new non-bargaining employees?

BACKGROUND AND FINDINGS

At the October 7, 2019 work session, the Board of Directors was briefed on the retirement plans for non-bargaining employees. Non-bargaining employees currently are offered two pension plans: a defined benefit and a defined contribution plan. The District pays the full cost of funding these plans.

Subsequent to that meeting, the District completed an analysis of the current plans. This analysis looked at the current plan design and related issues, alternative plan designs, and factors for evaluating plan design. At the August 27, 2020 work session, the Board was briefed on the results of that analysis.

The analysis found several concerns with the plans. Employers are moving away from defined benefit retirement plans. These plans are not portable and they don't provide an incentive or assistance for employees to save on their own. The employer bears all the risk of ensuring the plans are funded and the benefit structure favors long term employees.

The analysis reviewed four alternative plan designs: Final Average Pay, Defined Contribution, Cash Balance, and Sustainable Income. The analysis used four evaluation factors: risk

associated with funding the plan, whether the plan was portable, was it understandable to employees, and whether it provided an incentive for employees to also save for their retirement.

The District concluded that the Defined Contribution plan design was best suited. It is a very common model and comparatively easy to understand. It allows an employer match for employee contributions which provides an incentive for employees to also contribute. It is completely portable and the employees have control over how their funds are invested.

The District recommendation is to implement this new plan design for non-bargaining employees hired after March 1, 2021. Current employees of the District would remain in the current retirement plan.

The proposed plan:

- Employer contribution of 5% of wages,
- An employer match of up to 5% based on the employee contribution,
- Employees may direct their investments or enroll in a targeted fund,
- Raises the normal retirement age to 65 and
- Graduated vesting period of 50% at 2 years and 100% at 3 years.

FINANCIAL IMPACT

The savings are projected to be approximately \$3,596 the first year, and will grow to \$67,421 by the fifth year, with a total five-year savings of \$169,690. Those savings will continue to grow each year thereafter as more new employees are covered by the new structure and as existing employees retire or terminate. Over the long term, when the new structure is fully phased in, the annual cost of the retirement program will decrease from a projected cost of 11.91% of total compensation to a projected cost of 8.75 of total compensation.

RECOMMENDATION

Staff recommends adoption of Resolution No. 2021-02 authorizing an additional Defined Contribution Retirement Plan for non-bargaining employees hired after March 1, 2021 except as noted.

PROPOSED MOTION

I move that the Board adopt Resolution No. 2021-02 authorizing an additional Defined Contribution Retirement Plan for non-bargaining employees hired after March 1, 2021 except as noted.

RESOLUTION NO. 2021-02

**THE SALEM AREA MASS TRANSIT DISTRICT
NON - BARGAINING PROFIT SHARING PLAN**

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

WHEREAS, the Plan has been most recently amended to limit participation to non-bargaining employees hired before March 1, 2021, and the Director of Finance/CFO and the Contracted Services Manager if either is first hired before December 31, 2021;

WHEREAS, the District now wishes to establish a new Profit Sharing Plan to be known as the Salem Area Mass Transit District Non-Bargaining Profit Sharing Plan for those all other non-bargaining employees hired after March 1, 2021; and

WHEREAS, the District intends by this resolution to adopt the Salem Area Mass Transit District Non-Bargaining Profit Sharing Plan effective March 1, 2021.

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

THAT Resolution No. 2021–02 shall be adopted to direct that the Salem Area Mass Transit District Non-Bargaining Profit Sharing Plan shall be established by adopting the Governmental Profit-Sharing Plan Adoption Agreement attached to this Resolution; and

THAT the General Manager shall be authorized and directed to sign the Agreement to implement this Resolution, to be effective March 1, 2021.

ADOPTED BY THE BOARD OF DIRECTORS OF THE SALEM AREA MASS TRANSIT DISTRICT this 25 day of February, 2021.

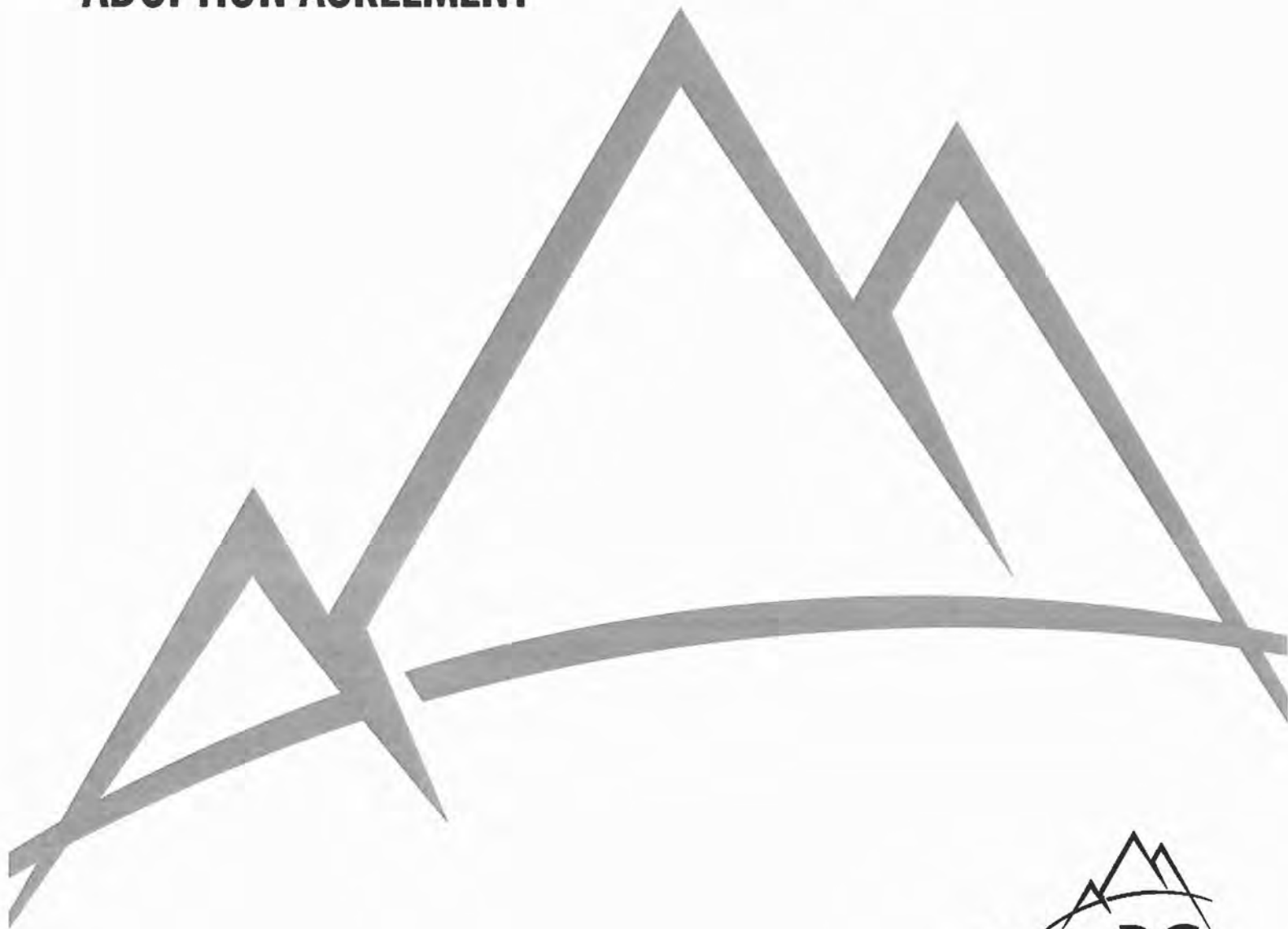
President
Board of Directors

ATTEST:

Secretary
Board of Directors

ICMA RETIREMENT CORPORATION

**GOVERNMENTAL PROFIT-SHARING PLAN
ADOPTION AGREEMENT**



**ICMA RETIREMENT CORPORATION
GOVERNMENTAL PROFIT-SHARING PLAN
ADOPTION AGREEMENT**

Plan Number 10-_____

The Employer hereby establishes a Profit Sharing Plan to be known as Salem Area Mass Transit District Non-Bargaining Profit Sharing Plan (the "Plan") in the form of the ICMA Retirement Corporation Governmental Profit Sharing Plan.

New Plan or Amendment and Restatement (Check One):

Amendment and Restatement

This Plan is an amendment and restatement of an existing defined contribution profit sharing plan. Please specify the name of the defined contribution profit sharing plan which this Plan hereby amends and restates:

Effective Date of Restatement. The effective date of the Plan shall be:

(Note: The effective date cannot be earlier than the first day of the Plan Year in which this restatement is adopted. If no date is provided, by default, the effective date will be the first day of the Plan Year in which the restatement is adopted.)

New Plan

Effective Date of New Plan. The effective date of the Plan shall be the first day of the Plan Year during which the Employer adopts the Plan, unless an alternate effective date is hereby specified: March 1, 2021

(Note: An alternate effective date can be no earlier than the first day of the Plan Year in which the Plan is adopted.)

I. EMPLOYER: Salem Area Mass Transit District

(The Employer must be a governmental entity under Internal Revenue Code § 414(d))

II. SPECIAL EFFECTIVE DATES

Please note here any elections in the Adoption Agreement with an effective date that is different from that noted above.

(Note provision and effective date.)

III. PLAN YEAR

The Plan Year will be:

January 1 – December 31 (*Default*)

The 12 month period ending June 30
Month *Day*

IV. Normal Retirement Age shall be age 65 (not to exceed age 65).

V. COVERED EMPLOYMENT CLASSIFICATIONS

1. The following group or groups of Employees are eligible to participate in the Plan:

- All Employees
- All Full Time Employees
- Salaried Employees
- Non union Employees
- Management Employees
- Public Safety Employees
- General Employees
- Other Employees (Specify the group(s) of eligible Employees below. Do not specify Employees by name. Specific positions are acceptable.) Non-Bargaining Employees first hired on or after March 1, 2021 **

The group specified must correspond to a group of the same designation that is defined in the statutes, ordinances, rules, regulations, personnel manuals or other material in effect in the state or locality of the Employer. The eligibility requirements cannot be such that an Employee becomes eligible only in the Plan Year in which the Employee terminates employment.

Note: As stated in Sections 4.09 and 4.10, the Plan may, however, provide that Final Pay Contributions or Accrued Leave Contributions are the only contributions made under the Plan.

**but excepting the Director of Finance/CFO and/or the Contracted Transportation Manager if either is first hired before December 31, 2021.

2. Period of Service required for participation

- N/A – The Employer hereby waives the requirement of a Period of Service for participation. Employees are eligible to participate upon employment. (*"N/A" is the default provision under the Plan if no selection is made.*)
- Yes. The required Period of Service shall be 6 months (not to exceed 12 months).

The Period of Service selected by the Employer shall apply to all Employees within the Covered Employment Classification.

3. Minimum Age (Select One) – A minimum age requirement is hereby specified for eligibility to participate.

- Yes. Age 18 (not to exceed age 21).
- N/A – No minimum age applies (*"N/A" is the default provision under the Plan if no selection is made.*)

VI. CONTRIBUTION PROVISIONS

1. The Employer shall contribute as follows (Choose all that apply):

Fixed Employer Contributions With or Without Mandatory Participant Contributions.
(If Option B is chosen, please complete section C.)

- A. Fixed Employer Contributions.** The Employer shall contribute on behalf of each Participant 5 % of Earnings or \$_____ for the Plan Year (subject to the limitations of Article V of the Plan).

Mandatory Participant Contributions

- are required
- are not required

to be eligible for this Employer Contribution.

B. Mandatory Participant Contributions for Plan Participation.

Required Mandatory Contributions. A Participant is required to contribute (subject to the limitations of Article V of the Plan) the specified amounts designated in items (i) through (iii) of the Contribution Schedule below:

Yes No

Employee Opt-In Mandatory Contributions. To the extent that Mandatory Participant Contributions are not required by the Plan, each Employee eligible to participate in the Plan shall be given the opportunity, when first eligible to participate in the Plan or any other plan or arrangement of the Employer described in Code section 219(g)(5)(A) to irrevocably elect to contribute Mandatory Participant Contributions by electing to contribute the specified amounts designated in items (i) through (iii) of the Contribution Schedule below for each Plan Year (subject to the limitations of Article V of the Plan):

Yes No

Contribution Schedule. (Any percentage or dollar amount entered below must be greater than 0% or \$0.)

i. _____% of Earnings,

ii. \$_____, or

iii. a whole percentage of Earnings between the range of _____ (insert range of percentages between 1% and 20% inclusive (e.g., 3%, 6%, or 20%; 5% to 7%)), as designated by the Employee in accordance with guidelines and procedures established by the Employer for the Plan Year as a condition of participation in the Plan. A Participant must pick a single percentage and shall not have the right to discontinue or vary the rate of such contributions after becoming a Plan Participant.

Employer "Pick up". The Employer hereby elects to "pick up" the Mandatory Participant Contributions¹.

Yes No (*"Yes" is the default provision under the Plan if no selection is made.*)

C. Election Window (Complete if Option B is selected):

Newly eligible Employees shall be provided an election window of _____ days (no more than 60 calendar days) from the date of initial eligibility during which they may make the election to participate in the Mandatory Participant Contribution portion of the Plan. Participation in the Mandatory Participant Contribution portion of the Plan shall begin the first of the month following the end of the election window.

An Employee's election is irrevocable and shall remain in force until the Employee terminates employment or ceases to be eligible to participate in the Plan. In the event of re-employment to an eligible position, the Employee's original election will resume. In no event does the Employee have the option of receiving the pick-up contribution amount directly.

¹ Neither an IRS opinion letter nor a determination letter issued to an adopting Employer is a ruling by the Internal Revenue Service that Participant contributions that are "picked up" by the Employer are not includable in the Participant's gross income for federal income tax purposes. Pick-up contributions are not mandated to receive private letter rulings; however, if an adopting Employer wishes to receive a ruling on pick-up contributions they may request one in accordance with Revenue Procedure 2012-4 (or subsequent guidance).

Discretionary Employer Contributions

The Employer will determine the amount of Employer Contributions to be made to the Plan for each Plan Year. The amount of Employer Contributions to be allocated to the Account of each Participant will be based on the ratio for the Plan Year that such Participant's Earnings bears to the Earnings of all Participants eligible for such contributions.

Fixed Employer Match of After-Tax Voluntary Participant Contributions. (Do not complete this section unless the Plan permits after-tax Voluntary Participant Contributions under Section VI.2 of the Adoption Agreement.)

The Employer shall contribute on behalf of each Participant _____% of Earnings for the Plan Year (subject to the limitations of Article V of the Plan) for each Plan Year that such Participant has contributed _____% of Earnings or \$_____. Under this option, there is a single, fixed rate of Employer Contributions, but a Participant may decline to make the Voluntary Participant Contributions in any Plan Year, in which case no Employer Contribution will be made on the Participant's behalf in that Plan Year.

Variable Employer Match of After-Tax Voluntary Participant Contributions. (Do not complete unless the Plan permits after-tax Voluntary Participant Contributions under Section VI.2 of the Adoption Agreement.)

The Employer shall contribute on behalf of each Participant an amount determined as follows (subject to the limitations of Article V of the Plan):

_____ % of the Voluntary Participant Contributions made by the Participant for the Plan Year (not including Voluntary Participant Contributions exceeding _____% of Earnings or \$_____);

PLUS _____ % of the contributions made by the Participant for the Plan Year in excess of those included in the above paragraph (but not including Voluntary Participant Contributions exceeding in the aggregate _____% of Earnings or \$_____).

Employer Matching Contributions on behalf of a Participant for a Plan Year shall not exceed \$ _____ or _____ % of Earnings, whichever is more or less.

Fixed Employer Match of Participant 457(b) Plan Deferrals. The Employer shall contribute on behalf of each Participant _____% of Earnings for the Plan Year (subject to the limitations of Article V of the Plan) for each Plan Year that such Participant has deferred _____% of Earnings or \$_____ to the Employer's 457(b) deferred compensation plan. Under this option, there is a single, fixed rate of Employer Contributions, but a Participant may decline to make the required 457(b) deferrals in any Plan Year, in which case no Employer Contribution will be made on the Participant's behalf in that Plan Year.

Variable Employer Match of Participant 457(b) Plan Deferrals.

The Employer shall contribute on behalf of each Participant an amount determined as follows (subject to the limitations of Article V of the Plan):

100 % of the elective deferrals made by the Participant to the Employer's 457(b) plan for the Plan Year (not including Participant contributions exceeding 5 % of Earnings or \$ _____);

PLUS _____ % of the elective deferrals made by the Participant to the Employer's 457(b) plan for the Plan Year in excess of those included in the above paragraph (but not including elective deferrals made by a Participant to the Employer's 457(b) plan exceeding in the aggregate _____ % of Earnings or \$ _____).

Employer Matching Contributions on behalf of a Participant for a Plan Year shall not exceed \$ _____ or _____ % of Earnings, whichever is more or less.

2. Each Participant may make a Voluntary Participant Contribution, subject to the limitations of Section 4.07 and Article V of the Plan:

Yes No (*"No" is the default provision under the Plan if no selection is made.*)

3. Employer contributions for a Plan Year shall be contributed to the Trust in accordance with the following payment schedule (no later than the 15th day of the tenth calendar month following the end of the calendar year or fiscal year (as applicable depending on the basis on which the Employer keeps its books) with or within which the particular Limitation Year ends, or in accordance with applicable law):

Weekly Biweekly Monthly Annually in December (specify month)

4. Participant contributions for a Plan Year shall be contributed to the Trust in accordance with the following payment schedule (no later than the 15th day of the tenth calendar month following the end of the calendar year or fiscal year (as applicable depending on the basis on which the Employer keeps its books) with or within which the particular Limitation Year ends, or in accordance with applicable law):

Weekly Biweekly Monthly Annually in _____ (specify month)

5. In the case of a Participant performing qualified military service (as defined in Code section 414(u)) with respect to the Employer:

A. Plan contributions will be made based on differential wage payments:

Yes No (*"Yes" is the default provision under the Plan if no selection is made.*)

B. Participants who die or become disabled will receive Plan contributions with respect to such service:

Yes No (*"No" is the default provision under the Plan if no selection is made.*)

VII. CASH OR DEFERRED ARRANGEMENT UNDER SECTION 401(K)

(Please note this is only applicable to certain grandfathered 401(k) plans.)

1. This Plan will include a cash or deferred arrangement allowing for Elective Deferrals under section 401(k) of the Code:²
 Yes No (*"No" is the default provision under the Plan if no selection is made.*)

(*If "no" is selected, skip to section VIII.*)

Each Participant may elect to make Elective Deferrals, not to exceed _____% of Earnings for the Plan Year, subject to the limitations of Article V of the Plan.

The provisions of the cash or deferred arrangement (the "401(k) feature") may be made effective as of the first day of the Plan Year in which the 401(k) feature is adopted. However, under no circumstances may a salary reduction agreement or other deferral mechanism be adopted retroactively.

2. The Employer will match Elective Deferrals:

Yes No (*"No" is the default provision under the Plan if no selection is made.*)

The Employer will contribute as follows (choose one, if applicable):

Employer Percentage Match of Elective Deferrals.

The Employer shall contribute on behalf of each Participant an amount determined as follows (subject to the limitations of Article V of the Plan):

_____ % of the Elective Deferrals made on behalf of the Participant for the Plan Year (not including Elective Deferrals exceeding _____ % of Earnings or \$ _____);

PLUS _____ % of the Elective Deferrals made on behalf of the Participant for the Plan Year in excess of those included in the above paragraph (but not including Elective Deferrals exceeding in the aggregate _____ % of Earnings or \$ _____).

Employer Contributions on behalf of a Participant for a Plan Year shall not exceed \$ _____ or _____ % of Earnings, whichever is _____ more or _____ less.

Employer Dollar Match of Elective Deferrals.

The Employer shall contribute on behalf of each Participant an amount determined as follows (subject to the limitations of Article V of the Plan):

\$ _____ for each _____ % of Earnings or \$ _____ that the Employer contributes on behalf of the Participant as Elective Deferrals for the Plan Year (not including Elective Deferrals exceeding _____ % of Earnings or \$ _____);

PLUS \$ _____ for each _____ % of Earnings or \$ _____ that the Employer contributes on behalf of the Participant as Elective Deferrals for the Plan Year in excess of those included in the above paragraph (but not including Elective Deferrals exceeding in the aggregate _____ % of Earnings or \$ _____).

Employer Contributions on behalf of a Participant for a Plan Year shall not exceed \$ _____ or _____ % of Earnings, whichever is _____ more or _____ less.

² Under current law, the cash or deferred arrangement option under section 401(k) of the Code is not available to an employer that is a State or local government or political subdivision thereof, or any agency or instrumentality thereof, unless that employer adopted a cash or deferred arrangement before May 6, 1986.

3. The Employer will permit Elective Deferrals and Catch-up Contributions elections to be made during the annual election window of _____ days (at least 30 calendar days). The election window will run from _____ to _____ (insert annual time frame for the election window or multiple time periods) and will not apply retroactively.
4. **Roth Provisions.** As provided in Section 20.03, Participants are permitted to make Roth Elective Deferrals from compensation in the amount or percentage specified in a salary reduction agreement:
 Yes No (*"No" is the default provision under the Plan if no selection is made.*)

VIII. EARNINGS

Earnings, as defined under Section 2.10 of the Plan, shall include:

1. Overtime
 Yes No (*"No" is the default provision under the Plan if no selection is made.*)
2. Bonuses
 Yes No (*"No" is the default provision under the Plan if no selection is made.*)
3. Other Pay (specifically describe any other types of pay to be included below)

IX. ROLLOVER PROVISIONS

1. The Employer will permit Rollover Contributions in accordance with Section 4.14 of the Plan:
 Yes No (*"Yes" is the default provision under the Plan if no selection is made.*)
2. The Plan will accept a direct rollover contribution to a Designated Roth Account as permitted in Section 20.05(b) (*401(k) plans with Roth feature only*):
 Yes No (*"Yes" is the default provision under the Plan if no selection is made.*)
3. The Plan will allow In-Plan Roth Conversions as provided in Section 20.06 (*401(k) plans with Roth feature only*):
 Yes No (*"Yes" is the default provision under the Plan if no selection is made.*)

X. LIMITATION ON ALLOCATIONS

If the Employer maintains or ever maintained another qualified plan in which any Participant in this Plan is (or was) a participant or could possibly become a participant, the Employer hereby agrees to limit contributions to all such plans as provided herein, if necessary in order to avoid excess contributions (as described in Section 5.04 of the Plan).

1. If the Participant is covered under another qualified defined contribution plan maintained by the Employer, the provisions of Section 5.04(a) through (c) of the Plan will apply, unless another method has been indicated below.

Other Method. (Provide the method under which the plans will limit total Annual Additions to the Maximum Permissible Amount, and will properly reduce any Excess Amounts, in a manner that precludes Employer discretion.)

2. The Limitation Year is the following 12 consecutive month period: 7/1-6/30

XI. VESTING PROVISIONS

The Employer hereby specifies the following vesting schedule, subject to (1) the Code's vesting requirements in effect on September 1, 1974 and (2) the concurrence of the Plan Administrator. (For the blanks below, enter the applicable percentage – from 0 to 100 (with no entry after the year in which 100% is entered), in ascending order.)

The following vesting schedule may apply to a Participant's interest in his/her Employer Contribution Account. The vesting schedule does not apply to Elective Deferrals, Catch-up Contributions, Mandatory Participant Contributions, Rollover Contributions, Voluntary Participant Contributions, Deductible Employee Contributions, Employee Designated Final Pay Contributions, and Employee Designated Accrued Leave Contributions, and the earnings thereon.

Period of Service Completed	Percent Vested
Zero	0 _____ %
One	0 _____ %
Two	50 _____ %
Three	100 _____ %
Four	_____ %
Five	_____ %
Six	_____ %
Seven	_____ %
Eight	_____ %
Nine	_____ %
Ten	_____ %

XII. WITHDRAWALS AND LOANS

1. Qualified reservist distributions are available under the Plan (*401(k) plans only*):
 Yes No (*"Yes" is the default provision under the Plan if no selection is made.*)
2. In-service distributions are permitted under the Plan, as provided in Section 9.08, after a Participant attains age (select one of the below options):
 59 ½
 70½ (*"70½" is the default provision under the Plan if no selection is made.*)
 Not permitted at any age
3. A Participant shall be deemed to have a severance from employment solely for purposes of eligibility to receive distributions from the Plan during any period the individual is performing service in the uniformed services for more than 30 days.
 Yes No (*"Yes" is the default provision under the Plan if no selection is made.*)
4. Tax-free distributions of up to \$3,000 for the direct payment of Qualified Health Insurance Premiums for Eligible Retired Public Safety Officers are available under the Plan.
 Yes No (*"No" is the default provision under the Plan if no selection is made.*)
5. In-service distributions of the Rollover Account are permitted under the Plan as provided in Section 9.09
 Yes No (*"No" is the default provision under the Plan if no selection is made.*)
6. The Plan will provide the following with respect to loans:
 - a. Loans are permitted under the Plan, as provided in Article XIII of the Plan:
 Yes No (*"No" is the default provision under the Plan if no selection is made.*)
 - b. Designated Roth Accounts will be available as a source for loans under the Plan (401(k) plans with Roth feature only) :
 Yes No (*"No" is the default provision under the Plan if no selection is made.*)
7. (401(k) plans only) Hardship withdrawals are permitted under the Plan as provided in Section 9.07 but only if specifically elected by the Employer.
 Yes No (*"No" is the default provision under the Plan if no selection is made.*)
If selected, hardship distributions will be available for the following Accounts:
 - a. Employer Contribution Account (Nonforfeitable Interest):
 Yes No (*"No" is the default provision under the Plan if no selection is made.*)
 - b. Participant Elective Deferral Account (not including earnings thereon accrued after December 31, 1988):
 Yes No (*"Yes" is the default provision under the Plan if no selection is made.*)
 - c. The determination of any deemed immediate and heavy financial need will be expanded to include any immediate and heavy financial need of the Participant's Primary Beneficiary, as provided in Section 9.07(b)(3):
 Yes No (*"Yes" is the default provision under the Plan if no selection is made.*)

XIII. SPOUSAL PROTECTION

The Plan will provide the following level of spousal protection (select one):

1. Participant Directed Election. The normal form of payment of benefits under the Plan is a lump sum. The Participant can name any person(s) as the Beneficiary of the Plan, with no spousal consent required.
2. Beneficiary Spousal Consent Election (Article XII of the Plan will apply if option 2 is selected). The normal form of payment of benefits under the Plan is a lump sum. Upon death, the surviving spouse is the Beneficiary, unless he or she consents to the Participant's naming another Beneficiary. (*"Beneficiary Spousal Consent Election" is the default provision under the Plan if no selection is made.*)
3. QJSA Election (Article XVII). The normal form of payment of benefits under the Plan is a 50% qualified joint and survivor annuity with the spouse (or life annuity, if single). In the event of the Participant's death prior to commencing payments, the spouse will receive an annuity for his or her lifetime. (If option 3 is selected, the spousal consent requirements in Article XII of the Plan also will apply.)

XIV. FINAL PAY CONTRIBUTIONS

(Under the Plan's definitions, Earnings automatically include leave cashouts paid by the later of 2 ½ months after severance from employment or the end of the calendar year. If the Plan will provide additional contributions based on the Participant's final paycheck attributable to Accrued Leave, please provide instructions in this section. Otherwise, leave this section blank.)

The Plan will provide for Final Pay Contributions if either 1 or 2 below is selected.

The following group of Employees shall be eligible for Final Pay Contributions:

1. Employees within the Covered Employment Classification identified in section V of the Adoption Agreement.
2. Other: _____
(*This must be a subset of the Covered Employment Classification identified in section V of the Adoption Agreement.*)

Final Pay shall be defined as (select one):

- A. Accrued unpaid vacation
- B. Accrued unpaid sick leave
- C. Accrued unpaid vacation and sick leave
- D. Other (*insert definition of Final Pay – must be leave that Employee would have been able to use if employment had continued and must be bona fide vacation and/or sick leave*):
paid accrued vacation and administrative leave _____

1. **Employer Final Pay Contribution.** The Employer shall contribute on behalf of each Participant 5 % of their Final Pay to the Plan (subject to the limitations of Article V of the Plan).
2. **Employee Designated Final Pay Contribution.** Each Employee eligible to participate in the Plan shall be given the opportunity at enrollment to irrevocably elect to contribute _____ % (insert fixed percentage of Final Pay to be contributed) or up to _____ % (insert maximum percentage of Final Pay to be contributed) of Final Pay to the Plan (subject to the limitations of Article V of the Plan).

Once elected, an Employee's election shall remain in force and may not be revised or revoked.

XV. ACCRUED LEAVE CONTRIBUTIONS

The Plan will provide for unpaid Accrued Leave Contributions annually if either 1 or 2 is selected below. The following group of Employees shall be eligible for Accrued Leave Contributions:

1. Employees within the Covered Employment Classification identified in section V of the Adoption Agreement.
2. Other: _____
(This must be a subset of the Covered Employment Classification identified in section V of the Adoption Agreement.)

Accrued Leave shall be defined as (select one):

- A. Accrued unpaid vacation
- B. Accrued unpaid sick leave
- C. Accrued unpaid vacation and sick leave
- D. Other (insert definition of Accrued Leave that is bona fide vacation and/or sick leave):

- 1. Employer Accrued Leave Contribution.** The Employer shall contribute as follows (choose one of the following options):

- For each Plan Year, the Employer shall contribute on behalf of each eligible Participant the unused Accrued Leave in excess of _____ (insert number of hours/days/weeks (circle one)) to the Plan (subject to the limitations of Article V of the Plan).
- For each Plan Year, the Employer shall contribute on behalf of each eligible Participant _____% of unused Accrued Leave to the Plan (subject to the limitations of Article V of the Plan).

- 2. Employee Designated Accrued Leave Contribution.**

Each eligible Participant shall be given the opportunity at enrollment to irrevocably elect to annually contribute _____% (insert fixed percentage of unpaid Accrued Leave to be contributed) or up to _____% (insert maximum percentage of unpaid Accrued Leave to be contributed) of unpaid Accrued Leave to the Plan (subject to the limitations of Article V of the Plan).

Once elected, an Employee's election shall remain in force and may not be revised or revoked.

XVI. The Employer hereby attests that it is a unit of state or local government or an agency or instrumentality of one or more units of state or local government.

XVII. The Employer understands that this Adoption Agreement is to be used with only the ICMA Retirement Corporation Governmental Profit Sharing Plan. This ICMA Retirement Corporation Governmental Profit Sharing Plan is a restatement of a previous plan, which was submitted to the Internal Revenue Service for approval on December 31, 2018, and received approval on June 30, 2020.

The Plan Administrator will inform the Employer of any amendments to the Plan made pursuant to Section 14.05 of the Plan or of the discontinuance or abandonment of the Plan. The Employer understands that an amendment(s) made pursuant to Section 14.05 of the Plan will become effective within 30 days of notice of the amendment(s) unless the Employer notifies the Plan Administrator, in writing, that it disapproves of the amendment(s). If the Employer so disapproves, the Plan Administrator will be under no obligation to act as Administrator under the Plan

XVIII. The Employer hereby appoints the ICMA Retirement Corporation as the Plan Administrator pursuant to the terms and conditions of the ICMA RETIREMENT CORPORATION GOVERNMENTAL PROFIT SHARING PLAN.

The Employer hereby agrees to the provisions of the Plan.

XIX. The Employer understands that it must complete a new Adoption Agreement upon first adoption of the Plan. Additionally, upon any modifications to a prior election, making of new elections, or restatements of the Plan, a new Adoption Agreement must be completed. The Employer hereby acknowledges it understands that failure to properly fill out this Adoption Agreement may result in disqualification of the Plan.

XX. An adopting Employer may rely on an Opinion Letter issued by the Internal Revenue Service as evidence that the Plan is qualified under section 401 of the Internal Revenue Code only to the extent provided in Rev. Proc. 2017-41. The Employer may not rely on the Opinion Letter in certain other circumstances or with respect to certain qualification requirements, which are specified in the Opinion Letter issued with respect to the Plan and in Rev. Proc. 2017-41.

In Witness Whereof, the Employer hereby causes this Profit Sharing Plan Adoption Agreement to be executed.

EMPLOYER SIGNATURE & DATE

Signature of Authorized Plan Representative: _____

Print Name: _____

Title: _____

Attest: _____

Date: ____ / ____ / ____
Month Day Year

For inquiries regarding adoption of the plan, the meaning of plan provisions, or the effect of the Opinion Letter, contact:

ICMA-RC
777 N. Capitol St. NE
Suite 600
Washington, DC 20002
800-326-7272



ICMA RETIREMENT CORPORATION
777 NORTH CAPITOL STREET, NE | WASHINGTON, DC 20002-4240
800-669-7400
WWW.ICMARC.ORG
BRC000-215-46187-0220-W1304



To: Board of Directors

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

Thru: Allan Pollock, General Manager

Date: February 25, 2021

Subject: Adoption of Resolution No. 2021-03 to approve the Special Transportation Fund and FTA 5310 (through ODOT) Projects for the 2022-2023 biennium

ISSUE

Shall the Board adopt Resolution No. 2021-03 to approve the Special Transportation Fund and FTA 5310 (through ODOT) Projects for the 2022-2023 biennium?

BACKGROUND AND FINDINGS

Salem Area Mass Transit District (SAMTD) is the Special Transportation Fund (STF) agency designated by Oregon State Statute to make recommendations for funding grant projects located in Marion and Polk Counties in accordance with the Oregon Department of Transportation (ODOT) recommended grant application process. Every two years, ODOT releases applications for STF and federal Section 5310 (5310 - ODOT) grants. These applications support transportation for seniors and people with disabilities in Marion and Polk Counties.

The STF Advisory Committee (STFAC) 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 STFAC received four applications for STF grant funds and three applications for Section 5310 (ODOT) funds.

The Technical Advisory Committee (TAC) and STFAC met in public meetings on February 2, 2021 where the applicants gave presentations about their projects and answered questions from committee members. The TAC deliberated the merits of each project to make their funding recommendations to the STFAC. The TAC consisted of the STFAC members, and one representative of the Mid-Willamette Valley Council of Governments. A summary of the projects requesting funding are shown below in **Table 1**. A copy of the project applications have been provided in **(Attachment B)**.

TABLE: 1 – PROJECT REQUESTS

Applicant	STF Project Description	Project Total Request	TAC / STFAC Recommend	Last Biennium Award
SAMTD	Operations for Cherriots Lift, Cherriots Shop and Ride, Cherriots Regional, STF Administration (\$4,000 by statute), and grant match.	\$1,604,641	\$1,482,321	\$1,477,194
City of Woodburn	WTS Operations (all services)	\$ 434,000	\$ 434,000	\$ 433,861
City of Silverton	Silver Trolley Operations	\$ 35,000	\$ 35,000	\$ 33,374
West Valley Hospital Foundation	West Valley Connections Van Operations	\$ 69,791	\$ 44,295	\$ 44,295
Applicant	5310 Project Description	Project Total Request	TAC / STFAC Recommend	Last Biennium Award
SAMTD	Mobility Management, Purchased Service (Cherriots Lift, Shop and Ride, and Regional), Preventative Maintenance for Cherriots Regional	\$1,945,215.40	\$1,945,217.55	\$1,924,414.00
City of Woodburn	Mobility Management, Preventative Maintenance	\$ 201,892.50	\$ 201,892.50	\$ 198,250.00
City of Silverton	Preventative Maintenance	\$ 10,318.95	\$ 10,318.95	\$ 10,000.00

Using these 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 SAMTD, and respectively for other PTSPs in Marion County.

RECOMMENDATION

The Special Transportation Fund Advisory Committee recommends the Board adopt Resolution No. 2021-03 to approve the Special Transportation Fund and FTA 5310 (through ODOT) Projects for the 2022-2023 biennium.

PROPOSED MOTION

I move that the Board adopt Resolution No. 2021-03 to approve the Special Transportation Fund and FTA 5310 (through ODOT) Projects for the 2022-2023 biennium.



Resolution No. 2021-03

APPROVAL OF 2022-2023 BIENNIUM STF AND 5310 PROJECTS FOR SALEM AREA MASS TRANSIT DISTRICT STF AGENCY AREA

WHEREAS, the Salem Area Mass Transit District, hereafter referred to as “District,” is designated as the STF Agency in the Special Transportation Fund Program; and,

WHEREAS, the District is designated as the STF Agency for Marion and Polk Counties under ORS 391.800 and OAR 732-005-0010 (29); and,

WHEREAS, the District’s governing body as the designated Qualified Entity (QE) is required to conduct a review of projects submitted for funding from the STF and FTA Section 5310 eligible entities; and,

WHEREAS, the District’s governing body as the designated QE 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 proposed for funding through the STF and FTA Section 5310 programs for the 2022-2023 biennium;

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

THAT, the Board, as the designated STF Agency and Qualified Entity for Marion and Polk Counties shall adopt Resolution No. 2021-03 to approve the list of projects and funding amounts identified in Table 1; and direct the General Manager to submit a record of the decision by the Board by March 1, 2021 as is required by the Oregon Department of Transportation.

ADOPTED by the SAMTD Board of Directors on the 25th day of February 2021, and effective thereupon.

ATTEST:

President
Board of Directors

Secretary
Board of Directors

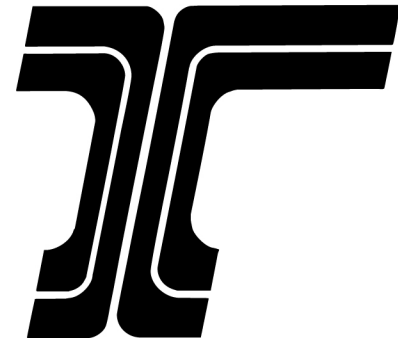


RESOLUTION 2021-03

TABLE: 1 – Project Requests

Applicant	STF Project Description	Project Total Request	TAC / STFAC Recommend	Last Biennium Award
SAMTD	Operations for Cherrlots Lift, Cherrlots Shop and Ride, Cherrlots Regional, STF Administration (\$4,000 by statute), and grant match	\$ 1,604,641	\$ 1,482,321	\$ 1,477,194
City of Woodburn	WTS Operations - (all services)	\$ 434,000	\$ 434,000	\$ 433,861
City of Silverton	Silver Trolley - Operations	\$ 35,000	\$ 35,000	\$ 33,374
West Valley Hospital Foundation	West Valley Connections Van Operations	\$ 69,791	\$ 44,295	\$ 44,295
Applicant	5310 Project Description	Project Total Request	TAC / STFAC Recommend	Last Biennium Award
SAMTD	Mobility Management; Purchased Services (Cherrlots Lift, Shop and Ride, and Regional); Preventative Maintenance - Cherrlots Regional	\$ 1,945,215.40	\$ 1,945,217.55	\$ 1,924,414.00
City of Woodburn	Mobility Management, Preventative Maintenance	\$ 201,892.50	\$ 201,892.50	\$ 198,250.00
City of Silverton	Preventative Maintenance	\$ 10,318.95	\$ 10,318.95	\$ 10,000.00

Oregon Department of Transportation



Special Transportation Fund Subrecipient Application FY 2021-23

This application is a tool provided to Subrecipients who want to apply to their STF agencies for STF projects.

A. Applicant Information

Transit Agency

Transit Agency Name

Salem Area Mass Transit District

Address

555 Court St NE, Suite 5230, Salem, Oregon 97301

Application Contact Name

Peggy Greene

Application Contact Title

Grants Administrator

Application Contact Email Address

peggy.greene@cherriots.org

Application Contact Telephone No.

(503) 361-7530

Special Transportation Fund Agency

Special Transportation Fund Agency

Salem Area Mass Transit District

STF Agency Contact Name

Peggy Greene

STF Agency Contact Title

Grants Administrator

STF Agency Contact Email

peggy.greene@cherriots.org

STF Agency Contact Telephone No.

(503) 588-2424

B. Transit Agency and Project Descriptions

Project 1

Project Title

OPERATIONS (Cherriots LIFT, Regional, and Shop and Ride), GRANT MATCH, ADMINISTRATION

Project Description

Cherriots is requesting funds for a portion of operating costs to help complete the funding for Regional, Cherriots LIFT, and Shop and Ride that are not met with other funding sources. Operating costs include Call Center, Preventative Maintenance, Purchase of Services, Fuel, staff time, marketing, and printing. In addition, funds are requested for federal grants match that serves seniors and individuals with disabilities. These include ODOT FY21-23 5310 and 5311 formula grants as well as FTA 5310 and 5307 ADA portion formula grants. STF Agency administration cost of \$4,000 is also included in the request.

Cherriots Call Center provides coordination of transportation services inside the Cherriots service area for Cherriots Regional, LIFT, and Shop and Ride. The call center refers customers to other providers and public transportation options outside the Cherriots service area.

Cherriots LIFT coordinates with Cherriots Local and Regional services. There are customers who are able to use Cherriots for some of their trips or a portion of their trips, classified as conditional eligibility, and then transfer to Cherriots LIFT. During inclement weather, some riders may be able to access Cherriots LIFT. Riders who qualify for LIFT Paratransit can ride Cherriots Regional from outside of the area, then transfer to Cherriots LIFT while within the urban growth boundary. This coordination ensures that seniors, individuals with disabilities, disadvantaged populations, as well as the general public have access to and are able to utilize public transportation services thereby enhancing their quality of life. Cherriots LIFT provides access and mobility to persons with disabilities who qualify for ADA paratransit services. Eligibility is determined by a three-step application process based on the individual's current functional ability to access fixed routes that may not otherwise have transportation options preventing them from accessing their community. Cherriots LIFT connects riders with shopping, work, and other essential activities. Cherriots collaborates with Marion County to provide Cherriots LIFT services for rehabilitation and work programs for developmentally and emotionally disabled individuals within the community.

Cherriots Regional provides access and mobility to the general public seniors and individuals with disabilities in the surrounding areas of Marion, Polk, and a small portion of Linn Counties. Regional transportation is essential in connecting communities and people to work, school, shopping, medical appointments, and other essential life-enhancing services and opportunities along with daily living skills.

The mobility coordinator attends community meetings in the 16 surrounding rural communities which are served by Cherriots Regional as well as urban communities. The purpose of attending the community meetings is to educate and inform on public transportation services and programs available, ensuring that duplication does not happen and access and utilization occurs. Cherriots collaborates with Marion County to provide Cherriots LIFT services for rehabilitation and work programs for developmentally and emotionally disabled individuals within the community.

Cherriots Shop and Ride service is for seniors 60+ and persons with disabilities who may or may not qualify for Cherriots LIFT. Cherriots Shop and Ride fills an unmet transportation need for this population within the Salem-Keizer urbanized area. Cherriots Shopper Shuttle provides designated shopping experiences are one-stop stores for approximately 75 minutes twice per week. The Dial-a-Ride portion of the service provides opportunities for customers to set medical appointments, shop at a store of their choice, socialize with family and friends, personal grooming, recreation activities, and classes/studies. This service promotes spending around the local community and access to important community resources.

Based on the FY18/19 ridership numbers Cherriots estimates 504,000 unlinked passenger trips (UPT) over the biennium. This number represents the combined estimate for Cherriots: Regional, LIFT, and Shop and Ride. Of those rides, it is estimated that 350,000 will be for seniors and individuals with a

disability. NOTE: FY 18/19 numbers were used for the estimate due to COVID-19 restrictions, essential trips only, and limited seating on vehicles during FY 19/20. Cherriots anticipates a return to 18/19 ridership levels in the new biennium.

Total Project Request
Operations: \$444,500
Grant Match: \$1,156,141
Administration: \$4,000

Total STF funds awarded to project
\$1,604,641.00

Project Type
Operating

Recipient Agency Name
Salem Area Mass Transit District

Address
555 Court St NE, Suite 5230, Salem, Oregon 97301

Recipient Agency Contact Name
Peggy Greene

Recipient Agency Contact Title
Grants Administrator

Recipient Agency Contact Email Address
peggy.greene@cherriots.org

Recipient Agency Contact Telephone No.
(503) 361-7530

Submitting Your Application

- Click the “Save” button to save your work. A link to the application will appear that you can copy for future reference. Or, you can enter your email address to have the link emailed to you.
- Attach any supporting documents using the “Upload” button or by dragging documents from your computer to the “drag files here” area.
- Electronically sign your application by using the pen icon. Type your name in the “Printed Name” section.
- Submit your application by using the “Submit Application” button.
- IF YOU DO NOT RECEIVE AN EMAIL RESPONSE, PLEASE CONTACT US IMMEDIATELY AT 503-986-3300 OR ODOTPTDREPORTING@ODOT.STATE.OR.US.

The person signing this form must have the legal authority to submit the application on behalf of the applicant.

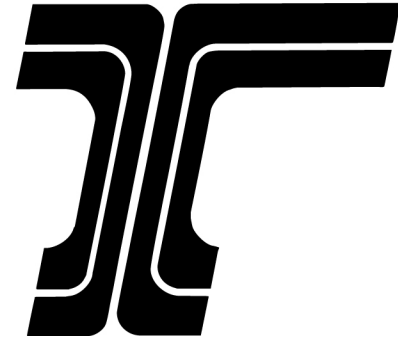
By electronically signing and submitting this form, the agency representative certifies that the information on the application is true and accurate to the best of their knowledge.

Signature

Printed Name
Peggy Greene



Oregon Department of Transportation



Special Transportation Fund Subrecipient Application FY 2021-23

This application is a tool provided to Subrecipients who want to apply to their STF agencies for STF projects.

A. Applicant Information

Transit Agency

Transit Agency Name

City of Woodburn

Address

270 Montgomery St.

Address Line 1

Woodburn Oregon 97071

City

State

Zip Code

Application Contact Name

Kathleen McClaskey

Application Contact Title

Transit Manager

Application Contact Email Address

kathleen.mcclaskey@ci.woodburn.or.us

Application Contact Telephone No.

(503) 982-5245

Special Transportation Fund Agency

Special Transportation Fund Agency

Salem Area Mass Transit District

STF Agency Contact Name

Peggy Greene

STF Agency Contact Title

Grant Administrator

STF Agency Contact Email

peggy.greene@cherriots.org

STF Agency Contact Telephone No.

(503) 361-7530

This email address will receive the completed STF subrecipient application.**B. Transit Agency and Project Descriptions****Project 1****Project Title**

Woodburn Transit System Services

Project Description

Woodburn Transit Service (WTS) provides public transportation services, and many users of these services are elderly, disabled, and temporarily impaired persons. WTS provides reliable, safe, and affordable transportation through its 60-minute Fixed Route, 30-minute Express Route, Weekend Route, and Dial-A-Ride paratransit service. Woodburn's fixed routes and complementary paratransit programs operate within the city limits of Woodburn. WTS coordinates stops with regional providers including SAMTD, CARTS, CAT and SMART. These public transportation options ensure residents have convenient access to grocery, medical and other resources locally, as well as timely connections to locations outside of Woodburn. The City's regional demand response service is the Volunteer Out-of-Town Medical Transportation Program (VOMT) that transports disabled and elderly residents unable to ride traditional transportation routes. These trips are made to medical facilities between Woodburn and Salem in the south or Portland in the north; volunteer drivers are reimbursed for their mileage. Additionally, WTS provides individualized telephone and in-person trip planning assistance. WTS regularly coordinates the transportation needs of clients from local social service agencies including Adult & Family Services, Salud Clinic and Senior & Disability Services. City staff consult with mobility-challenged passengers by phone and by making home visits to assess individuals' accessibility needs and offer suggestions for suitable transportation strategies. Staff also assists new riders with learning how to use the City and regional transit systems. The requested STF funding will support these WTS operations and preserve existing service levels.

Total STF funds awarded to project

\$434,000.00

Project Type

Operating

Recipient Agency Name

City of Woodburn

Address

270 Montgomery St

Address Line 1

Woodburn

City

Oregon

State

97071

Zip Code

Recipient Agency Contact Name**Recipient Agency Contact Title**

Kathleen McClaskey

Transit Manager

Recipient Agency Contact Email Address

kathleen.mcclaskey@ci.woodburn.or.us

Recipient Agency Contact Telephone No.

(503) 982-5245

Submitting Your Application

- Click the “Save” button to save your work. A link to the application will appear that you can copy for future reference. Or, you can enter your email address to have the link emailed to you.
- Attach any supporting documents using the “Upload” button or by dragging documents from your computer to the "drag files here" area.
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The person signing this form must have the legal authority to submit the application on behalf of the applicant.

By electronically signing and submitting this form, the agency representative certifies that the information on the application is true and accurate to the best of their knowledge.

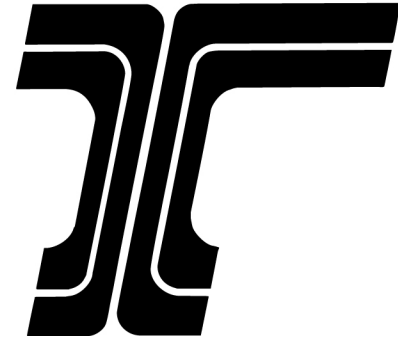
Signature



Printed Name

Kathleen McClaskey

Oregon Department of Transportation



Special Transportation Fund Subrecipient Application FY 2021-23

This application is a tool provided to Subrecipients who want to apply to their STF agencies for STF projects.

A. Applicant Information

Transit Agency

Transit Agency Name

city of silverton

Address

306 s water street

Address Line 1

silverton Oregon 97381

City

State

Zip Code

Application Contact Name

Jason Gottgetreu

Application Contact Title

Community Development Director

Application Contact Email Address

jgottgetreu@silverton.or.us

Application Contact Telephone No.

(503) 874-2212

Special Transportation Fund Agency

Special Transportation Fund Agency

Salem Area Mass Transit District

STF Agency Contact Name

Jolene White

STF Agency Contact Title

Administrative Assistant

STF Agency Contact Email

jolene.white@cherriots.org

STF Agency Contact Telephone No.

(503) 874-2212

This email address will receive the completed STF subrecipient application.**B. Transit Agency and Project Descriptions****Project 1****Project Title**

Silver Trolley, 5311 Match

Project Description

The Silver Trolley is operated by the City of Silverton's Community Development Department and provides demand responsive (dial-a-ride) curb-to-curb service for the senior, disabled, special needs, youth, economically disadvantaged, and the general public.

The Silver Trolley provides free curb-to-curb service; drivers wait for an individual at the curb of a public street, in front or close to the rider's house, building, or other designated pick-up location as possible. For passenger drop offs, the driver drops the rider off at the sidewalk, or another safe waiting area next to the curb of a public street, in front or as close to the designated drop off location as possible.

Dispatch is available for ride scheduling Monday through Friday from 8:00 AM to 5:00 PM (Dispatchers will not be available to answer phones on Saturdays so all trips need to be made by Friday). There is 24 hour voicemail service available for after hour calls or if the line is busy. Dispatchers shall route and schedule each trip request at the time the reservation is made. Ride confirmation and "ready times" will be given to the rider. When at capacity, alternative times and/or days can be arranged, or the trip may be denied. Riders should expect the Trolley vehicle within 30 minutes of the arranged time (15 minutes before and 15 minutes after the scheduled time).

The City periodically does outreach to ascertain the effectiveness of the Silver Trolley service and to see if there are any desired changes to the service. The City also advertises the Trolley service through print media being available in the City Hall lobby where citizens pay their Water Bill.

Riders of the Silver Trolley can coordinate their ride with Cherriots 20x to connect Silverton to the communities of Salem, Woodburn, Mt. Angel, Hubbard, Gervais, and other neighboring communities in between.

The Silver Trolley is expected to continue to serve the community of Silverton with a convenient demand response transportation service at no charge for seniors, people with disabilities, and the general public.

Total STF funds awarded to project

\$35,000.00

Project Type

Operating

Recipient Agency Name

City of Silverton

Address

306 s water street

Address Line 1

silverton

City

Oregon

State

97381

Zip Code

Recipient Agency Contact Name

Jason Gottgetreu

Recipient Agency Contact Title

Community Development Director

Recipient Agency Contact Email Address

jgottgetreu@silverton.or.us

Recipient Agency Contact Telephone No.

(503) 874-2212

Submitting Your Application

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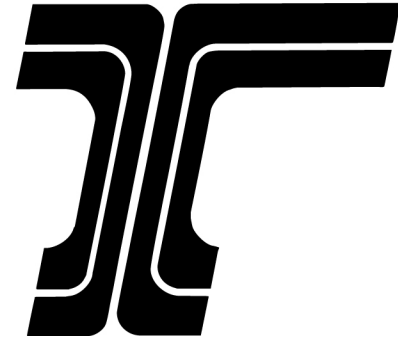
Signature



Printed Name

Jason Gottgetreu

Oregon Department of Transportation



Special Transportation Fund Subrecipient Application FY 2021-23

This application is a tool provided to Subrecipients who want to apply to their STF agencies for STF projects.

A. Applicant Information

Transit Agency

Transit Agency Name

West Valley Hospital

Address

525 SE Washington St.

Address Line 1

Dallas

City

Oregon

State

97338

Zip Code

Application Contact Name

Jill Munger

Application Contact Title

Director of Development

Application Contact Email Address

jill.munger@salemhealth.org

Application Contact Telephone No.

(503) 814-1953

Special Transportation Fund Agency

Special Transportation Fund Agency

Salem Area Mass Transit District

STF Agency Contact Name

Peggy Greene

STF Agency Contact Title

Grants Administrator

STF Agency Contact Email

peggy.greene@cherriots.org

STF Agency Contact Telephone No.

(503) 999-4643

This email address will receive the completed STF subrecipient application.

B. Transit Agency and Project Descriptions

Project 1

Project Title

West Valley Connections Van

Project Description

The Connections Van medical transportation program at Salem Health-West Valley Hospital serves seniors, disabled people, and our most medically fragile and low-income community members. The program fulfills goal number 5 of the Oregon Public Transportation plan by providing medical transportation to access health services offered by Salem Health-West Valley in Polk County. This program provides those most at risk with transportation services to and from medical appointments, including rehabilitation, wound care, primary care appointments, lab, x-ray, and more.

The Connection program provides rides via a small shuttle bus and a van to the West Valley primary service area, reaching west to Grand Ronde, south to Falls City, and including Independence and Monmouth and all of Dallas. Rides provide door to door services, with a wheelchair, stretcher, car seat accessible, and bariatric lift available in both vehicles providing rides. Additionally, the driver can wait for the patient or return at the appropriate time, so the patient isn't spending long hours waiting for a ride home following their appointment. There are few options available for public transit in the West Valley area. Those who are medically fragile or have mobility devices are more likely to cancel an appointment because they can't make it to their medical appointments, potentially endangering their wellbeing.

Providers, caregivers, and patients can call or refer to the service; either staff or a dispatcher will schedule the curb to curb rides as needed. Most rides are planned but can be the same day when slots are available. The service is highly regarded within the community, and the vehicles are easily identifiable with the program branding. Medical staff requests the service for their patients frequently, and we work to ensure clinic staff is well informed about the services offered to the patient at no cost.

Recent data indicates that over 95% of the population utilizing this van connections service are seniors or persons with disabilities living in Polk County and outlying areas within the county. The seniors and disabled population need cost-effective and reliable transportation available to them as their medical issues arise.

This highly beneficial service continues to be an effective and easy service for residents with medical needs to access. Often the residents we serve are located in remote areas of the county where other services do not reach. Because there is a lack of affordable transportation options for this population, it is necessary to continue the services to protect the wellness and often medically complex needs of our aging population.

Although lockdown due COVID-19 impacted ridership during three and into four, accumulative data to date indicates 1770 rides to and from medical appointments with connections program assistance. The generous investment from another STF grant will continue to fund the program coordinator, whose role is to help drive, train, and schedule rides and volunteers each month. This support provides the programmatic platform necessary for offer easy access to what otherwise might be tricky transportation needs for area residents.

Total STF funds awarded to project

\$69,791.00

Project Type

Operating

Recipient Agency Name

Salem Health West Valley Foundation

Address

PO Box 14001

Address Line 1

Salem

Oregon

97309

City

State

Zip Code

Recipient Agency Contact Name

Jill Munger

Recipient Agency Contact Title

Director of Development

Recipient Agency Contact Email Address

foundation@salemhealth.org

Recipient Agency Contact Telephone No.

(503) 814-1990

Submitting Your Application

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Supporting Documents (Optional)

WVH Connections Van 21-23 program Budget.xlsx

WVH Connection Van 21-23 additional details.xlsx

The person signing this form must have the legal authority to submit the application on behalf of the applicant.

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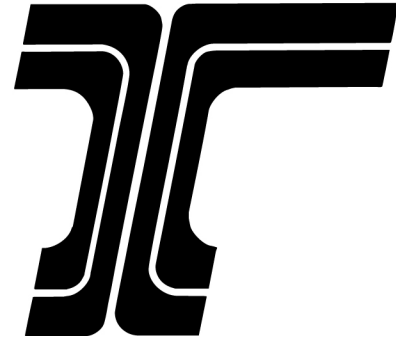
Signature



Printed Name

Jill Munger

Oregon Department of Transportation



Section 5310 Subrecipient Application FY 2021-23

Enhanced Mobility of Seniors and Individuals with Disabilities

This application is a tool provided to Subrecipients who want to apply to their STF agencies for 5310 projects.

Transit Agency

Transit Agency Legal Name

Salem Area Transit Agency

Transit Agency DBA Name (Optional)

Cherriots

Agency Mailing Address (Street or PO Box)

555 Court Street NE Suite 5230

Address Line 1

Salem,

City

Oregon

State

97301

Zip Code

Agency Contact Name

Peggy Greene

Agency Contact Title

Grants Administrator

Agency Contact Email Address

peggy.greene@cherriots.org

Agency Contact Telephone No.

(503) 361-7530

Employer Identification Number (EIN)

93-0793128

Urbanized Zone

Salem area

Are you applying to a 5310 Agency or 5310 Small Urban Agency?

5310

Lead (STF) Agency

Lead (STF) Agency Name

Salem Area Mass Transit District

For the agencies applying for small urban, make sure to select the small urban designation from the drop-down.

Lead (STF) Agency Contact Name

Peggy Greene

Lead (STF) Agency Contact Title

Grants Administrator

Lead (STF) Agency Contact Email Address

peggy.greene@cherriots.org

Lead (STF) Agency Contact Telephone No.

503 361-7530

This email address will receive the completed 5310 subrecipient application.

Select the type(s) of service that will be supported by this award. Select all that apply. See instructions for definitions.

- | | |
|--------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------|
| <input checked="" type="checkbox"/> Open to the general public at all times | <input type="checkbox"/> Open to the general public on a space-available basis |
| <input checked="" type="checkbox"/> Open only to seniors and individuals with disabilities | <input type="checkbox"/> Limited to defined clientele (e.g. residential home) |
| <input checked="" type="checkbox"/> Demand Response | <input checked="" type="checkbox"/> Deviated Route |

Are any FTA-funded buildings that your transit agency owns located in a flood zone?

[More information on floodplains](#)

- Yes
 No

If yes, do you have flood insurance?

- Yes
 No

Risk Assessment Information

Did your agency have any turnover of management or financial staff in the last two years?

- Yes
 No

Does your agency have an accounting system that allows you to completely and accurately track the receipt and disbursement of funds related to the award?

- Yes
 No

What type of accounting system does your agency use?

- Manual
 Automated
 Combined

Does your agency have a system in place that will account for 100 percent of each employee's time?

Yes

No

Did your staff members attend required trainings and meetings during prior grant award cycles?

Yes

No

Was your agency audited by the Federal government in the past two years?

Yes

No

Did your agency stay on budget in the past two years?

Yes

No

Transit Agency Projects

Transit Agency Project 1

Project Name

MOBILITY MANAGEMENT

Project Details

Project Selection

A. Purchased Service

B. Mobility Management

C. Vehicle Purchase

D. Capitalized Vehicle Preventive Maintenance

E. Equipment, Signs and Amenities, Shelters

F. Facilities: Bus Barns and Other Buildings

Select the project types that you wish to include in your application. Select all that apply.

B. Mobility Management

1. Project Title

Project Title

Travel Training sessions and outreach activities in Salem-Keizer and in rural Marion and Polk counties

2. Explain how your project is planned, designed, and carried out to meet the special needs of seniors and individuals with disabilities when general public transit is either insufficient, inappropriate, or not available:

Project Service Description

This project coordinates and seeks to expand on transportation services for seniors, individuals with disabilities, as well as disadvantaged populations within the Salem-Keizer and surrounding rural communities to assist persons to overcome the barriers to access public transportation. This project will help fund three positions: Travel Trainer, Mobility Management Coordinator, and Customer Service Manager.

The Mobility Management Coordinator is vital to Cherriots forging partnerships, collaborations, and opportunities within the community ensuring Cherriots is viewed as a positive, contributing community partner; therefore enhancing the awareness of transportation services and programs that are available. The enhanced awareness allows agencies, advocates, and community members access to public transportation themselves as well as share what they have learned about Cherriots transportation services and programs leading to other people accessing public transportation. The coordinator also gathers and analyzes collected data to evaluate transportation service options for persons with disabilities as well as maps, implements, and coordinates educational programs to address community transportation needs, informing the community of efficient ways to access existing transportation services. The Travel Trainer and the Coordinator jointly provide community presentations so attendees are not only aware of transportation options but also how to access them on an individual level. Experience has shown, when the travel trainer attends community presentations, individuals are more likely to utilize travel training services.

The Travel Trainer fills a more specialized role by providing individualized training. The Travel Trainer evaluates customer needs and abilities, then matches existing and potential riders with the services that are most appropriate to meet their transportation requirements. Travel training provides essential instruction on how to access and utilize public transportation. The Cherriots Travel Trainer might travel with a person 4 or 5 times depending on the complexity of the trip and their ability or only once.

The Customer Service Manager provides oversight of the Transit Host and Cherriots LIFT Eligibility program. Transit Hosts operate outside on the Downtown Transit Center mall to assist seniors and people with disabilities in addition to the general public access the correct bus and provide trip planning. Transit hosts track the number of customers served each day and average over 77.7 contacts per day.

The project also promotes transportation services and programs on social media channels, the web, targeted geographic location mailers, and advertisements in local newspapers.

3. Project Type

Providing travel training and trip planning activities for customers

4. Project cost and match information:

Total Project Cost	Match Amount (Total Project Cost x 10.27%)	Grant Amount
225,090	\$23,116.74	\$201,973.26

5. Describe the source of your local match funds in the field

below (examples: funds from your budget, STF funds). If the matching funds are not available now, describe when they will be (examples: next fiscal year, month/year). Please be specific.

Local Match Details

The source of local match will be STF funds.

6. On what page is project listed in the Adopted Coordinated Plan?

For multiple pages use this box

25, 39, 63

7. Date Coordinated Plan adopted:

9/9/2019

8. Identify the estimated number of customer contacts, customers trained, or mobility products/services produced. Describe the method you will use to measure output from the project:

Project Performance Goals

Cherriots anticipates service levels near that of FY19/20 for the new biennium; however, due to COVID-19 and Governor orders, the number of customer contacts, customers trained or mobility services produced are difficult to estimate.

Cherriots estimated outcomes:

- * 270 individuals successfully travel trained per year.
- * 290 outreach activities per year; Cherriots Mobility Management staff attendance at meetings, provide presentations, and host informational sessions.
- * 150,000 trip planning interactions from website trip planning, Transit App sessions, and staff supported interactions.
- * 6,000 contacts/agencies directly in contact with Cherriots staff at community meetings, presentations, informational sessions.
- * 6 or more drafted, customized, and/or revised literature products for current or prospective riders.
- * 2,000,000 trips provided on Cherriots Local with 750,000 reduced fare that includes seniors 60+ individuals with disabilities, and youth (Cherriots anticipates a return to collecting fares).
- * 5,500 trips per year on Cherriots Shop and Ride service for seniors 60+ and individuals with disabilities.

Cherriots will measure the project outcome results defined by a biennial work plan. The Mobility Management Coordinator collects data on outcome measures and reports progress quarterly. Annually, outcomes are analyzed and outcome achievements are reported. Cherriots will:

- * Continue to track the number of trips provided on Cherriots Local with reduced fare that includes seniors 60+, individuals with disabilities, and youth.
- * Continue to track the number of trips provided on Cherriots Shop and Ride service specific for seniors 60+ and individuals with disabilities.
- * Continue awareness of the availability and value of transit services in the community.
- * Increase public support for local transportation showing people are utilizing services and programs more, as well as recommending to others they serve.
- * Maintain continuity of customer service wherever riders connect for Cherriots services such that service offered to individuals is seamless.
- * Increase ridership of existing services in order to gain access to jobs, schools, medical facilities, shopping, and recreational locations.

Application Totals

Total Project Costs
\$225,090.00

Total Match Amount
\$23,116.74

Total Grant Amount
\$201,973.26

Submitting Your Application

- Click the “Save” button to save your work. A link to the application will appear that you can copy for future reference. Or, you can enter your email address to have the link emailed to you.

- Attach any supporting documents using the “Upload” button or by dragging documents from your computer to the “drag files here” area.
- Electronically sign your application by using the pen icon. Type your name in the “Printed Name” section.
- Submit your application by using the “Submit Application” button.
- IF YOU DO NOT RECEIVE AN EMAIL RESPONSE, PLEASE CONTACT US IMMEDIATELY AT 503-986-3300 OR ODOTPTDREPORTING@ODOT.STATE.OR.US.

The person signing this form must have the legal authority to submit the application on behalf of the applicant.

By electronically signing and submitting this form, the agency representative certifies that the information on the application is true and accurate to the best of their knowledge.

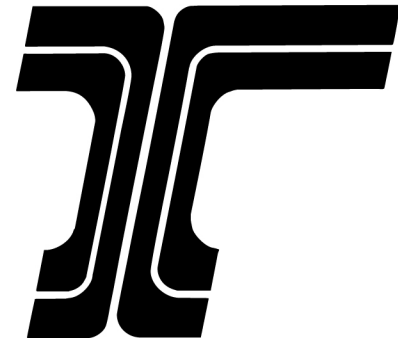
Signature

Printed Name

Peggy Greene

A handwritten signature in black ink, appearing to read "Peggy Greene", is written over a horizontal line.

Oregon Department of Transportation



Section 5310 Subrecipient Application FY 2021-23

Enhanced Mobility of Seniors and Individuals with Disabilities

This application is a tool provided to Subrecipients who want to apply to their STF agencies for 5310 projects.

Transit Agency

Transit Agency Legal Name

Salem Area Mass Transit District

Transit Agency DBA Name (Optional)

Cherriots

Agency Mailing Address (Street or PO Box)

555 Court Street NE, Suite 5230

Address Line 1

Salem

City

Oregon

State

97301

Zip Code

Agency Contact Name

Peggy Greene

Agency Contact Title

Grants Administrator

Agency Contact Email Address

peggy.greene@cherriots.org

Agency Contact Telephone No.

(503) 361-7530

Employer Identification Number (EIN)

93-0793128

Urbanized Zone

Salem area

Are you applying to a 5310 Agency or 5310 Small Urban Agency?

5310

Lead (STF) Agency

Lead (STF) Agency Name

Salem Area Mass Transit District

For the agencies applying for small urban, make sure to select the small urban designation from the drop-down.

Lead (STF) Agency Contact Name

Peggy Greene

Lead (STF) Agency Contact Title

Grants Administrator

Lead (STF) Agency Contact Email Address

peggy.greene@cherriots.org

Lead (STF) Agency Contact Telephone No.

503 361-7530

This email address will receive the completed 5310 subrecipient application.

Select the type(s) of service that will be supported by this award. Select all that apply. See instructions for definitions.

- Open to the general public at all times
- Open only to seniors and individuals with disabilities
- Demand Response
- Open to the general public on a space-available basis
- Limited to defined clientele (e.g. residential home)
- Deviated Route

Are any FTA-funded buildings that your transit agency owns located in a flood zone?

[More information on floodplains](#)

- Yes
- No

If yes, do you have flood insurance?

- Yes
- No

Risk Assessment Information

Did your agency have any turnover of management or financial staff in the last two years?

- Yes
- No

Does your agency have an accounting system that allows you to completely and accurately track the receipt and disbursement of funds related to the award?

- Yes
- No

What type of accounting system does your agency use?

- Manual
- Automated
- Combined

Does your agency have a system in place that will account for 100 percent of each employee's time?

Yes

No

Did your staff members attend required trainings and meetings during prior grant award cycles?

Yes

No

Was your agency audited by the Federal government in the past two years?

Yes

No

Did your agency stay on budget in the past two years?

Yes

No

Transit Agency Projects

Transit Agency Project 1

Project Name

PURCHASE OF SERVICE (CHERRIOTS LIFT, REGIONAL, SHOP AND RIDE)

Project Details

Project Selection

A. Purchased Service

B. Mobility Management

C. Vehicle Purchase

D. Capitalized Vehicle Preventive Maintenance

E. Equipment, Signs and Amenities, Shelters

F. Facilities: Bus Barns and Other Buildings

Select the project types that you wish to include in your application. Select all that apply.

A. Purchased Service Project

1. Project Title

Project Title

Transportation Options for Marion, Polk, and a small part of Linn counties: Paratransit; Rural commuter, Rural fixed route w/deviations; Dial-a-Ride service for seniors and people with disabilities and a Shopper Shuttle for seniors and people with disabilities.

2. Explain how your project is planned, designed, and carried out to meet the special needs of seniors and individuals with disabilities when general public transit is either insufficient, inappropriate, or not available:

Project Service Description

This project will fund a portion of Cherriots purchased service costs for Cherriots LIFT/paratransit; Cherriots Regional and Cherriots Shop and Ride. These services provide public transportation for 16 communities in Marion, Polk, and a small portion of Linn counties. Cherriots purchased services connect seniors, people with disabilities, low income, as well as all the general public. The purchased service will be provided by MV Transportation, Inc. The service, schedule, days, and hours are designed to meet the needs of seniors and individuals with disabilities. The budget includes a portion of contractor costs and administrative costs required to manage the service contract.

Cherriots Regional provides a commuter express service in Marion, Polk, and a small portion of Linn counties (operating Monday - Saturday) and a new Fixed Route with deviations (Route 45) in Polk County operating Monday - Friday. Route 45 is a service between Dallas, Independence, and Monmouth linking to commuter express routes to Salem-Keizer. Riders use Regional to connect with employment, education, medical services, and social or recreational opportunities to and from the surrounding rural communities. Riders call the Cherriots Call Center 24 hours in advance for a deviation on Route 45. (Note: Route 45 replaced the Polk County Flex Dial-a-Ride service on January 4, 2021.)

In FY 18/19 Cherriots Regional provided 93,910 trips, 40% were for seniors and /or individuals with disabilities traveling 335,339 Revenue Service Miles. In FY 19/20 85,962 trips were provided traveling 392,766 Revenue Service Miles. NOTE: COVID-19 and the governor's orders to Stay Home, Save Lives has greatly impacted customer access to public transportation and businesses in their community. Cherriots has suspended fare collection due to COVID and is unable to determine the percentage of seniors and individuals with disabilities using the Regional services.

Cherriots LIFT is the complementary ADA paratransit service provided by Cherriots within the urban growth boundaries of Salem and Keizer. Cherriots LIFT is an origin-to-destination service for people who are functionally unable to use Cherriots Local. A three-step application process to determine eligibility is required: Application, medical questionnaire, and in-person functional assessment. Cherriots LIFT is provided Monday through Saturday from 5:00 am to 10:00 pm (COVID hours mirror the reduced hours of Cherriots Local Service 6:00 am - 9:00 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. Cherriots Call Center operates Monday-Friday 6 am-6 pm and Saturday/Sunday 8 am-4 pm.

FY 18/19 Cherriots Lift provided 137,815 trips, 99% of which were seniors and persons with disabilities traveling 791,198 Revenue Service Miles. FY 19/20 104,385 trips were provided traveling 613,182 Revenue Service Miles. NOTE: COVID-19 and the Governor's order to Stay Home, Save Lives has greatly impacted the ridership on paratransit. During the 7 days, local service was suspended to regroup public transit in March, Cherriots LIFT provided life-sustaining trips to eligible customers.

Cherriots Shop and Ride provides a shopper shuttle and dial-a-ride service to seniors and people with disabilities within the urban growth boundaries of Salem and Keizer. This public transportation is open to any senior or individual with a disability without a qualifying interview. Trips can be scheduled up to two weeks in advance, providing service Monday through Friday from 7:00 am-6:00 pm.

The shopper shuttle alternates shopping trips to cover the urban growth boundary. Stores have been selected with criteria for one stop services such as groceries, pharmacies, households, banks

Application Totals

Total Project Costs
\$1,553,124.00

Total Match Amount
\$159,505.83

Total Grant Amount
\$1,393,618.17

Submitting Your Application

- Click the “Save” button to save your work. A link to the application will appear that you can copy for future reference. Or, you can enter your email address to have the link emailed to you.
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The person signing this form must have the legal authority to submit the application on behalf of the applicant.

By electronically signing and submitting this form, the agency representative certifies that the information on the application is true and accurate to the best of their knowledge.

Signature

Printed Name

Peggy Greene

A handwritten signature in black ink, appearing to read 'Peggy Greene', written over a horizontal line.

Oregon Department of Transportation



Section 5310 Subrecipient Application FY 2021-23

Enhanced Mobility of Seniors and Individuals with Disabilities

This application is a tool provided to Subrecipients who want to apply to their STF agencies for 5310 projects.

Transit Agency

Transit Agency Legal Name

Salem Area Mass Transit District

Transit Agency DBA Name (Optional)

Cherriots

Agency Mailing Address (Street or PO Box)

555 Court St NE, Suite 5230

Address Line 1

Salem,

City

Oregon

State

97301

Zip Code

Agency Contact Name

Peggy Greene

Agency Contact Title

Grants Administrator

Agency Contact Email Address

peggy.greene@cherriots.org

Agency Contact Telephone No.

(503) 361-7530

Employer Identification Number (EIN)

93-0793128

Urbanized Zone

Salem area

Are you applying to a 5310 Agency or 5310 Small Urban Agency?

5310

Lead (STF) Agency

Lead (STF) Agency Name

Salem Area Mass Transit District

For the agencies applying for small urban, make sure to select the small urban designation from the drop-down.

Lead (STF) Agency Contact Name

Peggy Greene

Lead (STF) Agency Contact Title

Grants Administrator

Lead (STF) Agency Contact Email Address

peggy.greene@cherriots.org

Lead (STF) Agency Contact Telephone No.

503 361-7530

This email address will receive the completed 5310 subrecipient application.

Select the type(s) of service that will be supported by this award. Select all that apply. See instructions for definitions.

- Open to the general public at all times
- Open only to seniors and individuals with disabilities
- Demand Response
- Open to the general public on a space-available basis
- Limited to defined clientele (e.g. residential home)
- Deviated Route

Are any FTA-funded buildings that your transit agency owns located in a flood zone?

[More information on floodplains](#)

- Yes
- No

If yes, do you have flood insurance?

- Yes
- No

Risk Assessment Information

Did your agency have any turnover of management or financial staff in the last two years?

- Yes
- No

Does your agency have an accounting system that allows you to completely and accurately track the receipt and disbursement of funds related to the award?

- Yes
- No

What type of accounting system does your agency use?

- Manual
- Automated
- Combined

Does your agency have a system in place that will account for 100 percent of each employee's time?

Yes

No

Did your staff members attend required trainings and meetings during prior grant award cycles?

Yes

No

Was your agency audited by the Federal government in the past two years?

Yes

No

Did your agency stay on budget in the past two years?

Yes

No

Transit Agency Projects

Transit Agency Project 1

Project Name

REGIONAL PREVENTIVE MAINTENANCE

Project Details

Project Selection

A. Purchased Service

B. Mobility Management

C. Vehicle Purchase

D. Capitalized Vehicle Preventive Maintenance

E. Equipment, Signs and Amenities, Shelters

F. Facilities: Bus Barns and Other Buildings

Select the project types that you wish to include in your application. Select all that apply.

D. Capitalized Vehicle Preventive Maintenance

1. Describe how this project coordinates with other services to provide services to seniors and individuals with disabilities:

Project Coordination Description

This project will fund the preventive maintenance of approximately 13 vehicles in the Cherriots Regional fleet. Regional provides trips to seniors and individuals with disabilities in addition to the general public. All vehicles in this service are accessible by ramp or lift.

Regional provides a commuter express service in Marion, Polk, and a small portion of Linn Counties, serving 16 communities: Woodburn, Gervais, Brooks, Silverton, Mt. Angel, Stayton, Sublimity, Mehama, Lyons, Mill City, Gates, Dallas, Independence, and Monmouth. January 4, 2021, Cherriots Regional will introduce a deviated fixed route (Route 45) serving Dallas, Independence, and Monmouth with service between these cities in Polk county. (There is no other public transportation in Polk County) Route 45 will deviate for seniors and persons with disabilities or the general public who are unable to access one of the many service stops in each community and operates Monday through Friday. The other Regional routes operate Monday through Saturday from approximately 6:00 am to 8:00 pm.

Maintenance is provided by Salem Area Mass Transit District (Cherriots) employees at the Del Webb Maintenance Facility. The budget reflects the total costs; administrative; labor; parts; and replacement costs to maintain the fleet. Please note: This project does not include repairs resulting from motor vehicle accidents covered by insurance, repairs on vehicles or components under warranty, or repairs that are paid for in other agreements or contracts.

Preventive Maintenance ensures safe and reliable Regional service, which is coordinated with other services. Cherriots Call Center provides coordination of transportation services inside the Cherriots service area for Cherriots Regional, LIFT, and Shop and Ride. The call center refers customers to other providers and public transportation options outside of the Cherriots service area. Cherriots LIFT coordinates with Cherriots Local and Regional services. There are customers who are able to use Cherriots for some of their trips or a portion of their trips, classified as conditional eligibility, and then transfer to Cherriots LIFT. During inclement weather, some riders may only be able to access Cherriots LIFT. Riders who qualify can ride Cherriots Regional from outside of the area, then transfer to Cherriots LIFT while within the urban growth boundary. This coordination ensures that seniors, individuals with disabilities, disadvantaged populations, as well as the general public have access to and are able to utilize public transportation services thereby enhancing their quality of life.

2. Is a Vehicle Preventive Maintenance Plan submitted with your application? A plan reflecting current fleet policies, fleet procedures, and vehicle and lift equipment manufacturer's recommended maintenance schedules is required.

Yes No

3. Number of vehicles included in this preventive maintenance project:

13

4. Project cost and match information:

Total Project Cost

389,640

Match Amount (Total Project Cost x**10.27%)**

\$40,016.03

Grant Amount

\$349,623.97

5. Describe the source of your local match funds in the field below (examples: funds from your budget, STF funds). If the matching funds are not available now, describe when they will be (examples: next fiscal year, month/year). Please be specific.

Local Match Details

Local match will be provided by STF funds dependent on concurrent STF award.

6. On what page is project listed in the Adopted Coordinated Plan?

For multiple pages use this box

49, 53, 62

7. Date Coordinated Plan adopted:

9/9/2019

8. Is this project part of a group of activities or projects that are dependent on each other (for example, bus washing station dependant on facility)?

 Yes No**If Yes, provide details of grouped service activities.**

Yes, this project provides preventive maintenance of Regional buses. The Regional transportation service project is funded with ODOT 5311 and 5310 formula funds. Without a transportation service project, this project would not exist.

Application Totals**Total Project Costs**

\$389,640.00

Total Match Amount

\$40,016.03

Total Grant Amount

\$349,623.97

Submitting Your Application

- Click the "Save" button to save your work. A link to the application will appear that you can copy for future reference. Or, you can enter your email address to have the link emailed to you.
- Attach any supporting documents using the "Upload" button or by dragging documents from your computer to the "drag files here" area.
- Electronically sign your application by using the pen icon. Type your name in the "Printed Name" section.
- Submit your application by using the "Submit Application" button.
- IF YOU DO NOT RECEIVE AN EMAIL RESPONSE, PLEASE CONTACT US IMMEDIATELY AT

503-986-3300 OR ODOTPTDREPORTING@ODOT.STATE.OR.US.

Supporting Documents (Optional)

Fleet Maintenance Plan 2018.pdf

The person signing this form must have the legal authority to submit the application on behalf of the applicant.

By electronically signing and submitting this form, the agency representative certifies that the information on the application is true and accurate to the best of their knowledge.

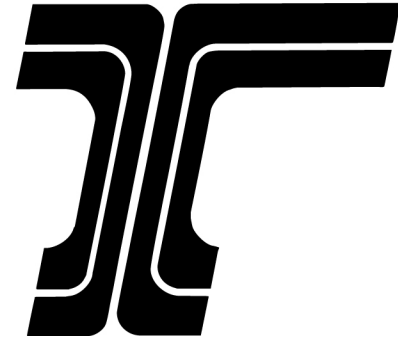
Signature

Printed Name

Peggy Greene

A handwritten signature in black ink, appearing to read "Peggy Greene", is written over a horizontal line.

Oregon Department of Transportation



Section 5310 Subrecipient Application FY 2021-23

Enhanced Mobility of Seniors and Individuals with Disabilities

This application is a tool provided to Subrecipients who want to apply to their STF agencies for 5310 projects.

Transit Agency

Transit Agency Legal Name

City of Woodburn

Agency Mailing Address (Street or PO Box)

270 Montgomery St.

Address Line 1

Woodburn Oregon 97071

City

State

Zip Code

Agency Contact Name

Kathleen McClaskey

Agency Contact Title

Transit Manager

Agency Contact Email Address

kathleen.mcclaskey@ci.woodburn.or.us

Agency Contact Telephone No.

(503) 982-5245

Employer Identification Number (EIN)

93-6002282

Urbanized Zone

Salem area

Are you applying to a 5310 Agency or 5310 Small Urban Agency?

5310

Lead (STF) Agency

Lead (STF) Agency Name

Salem Area Mass Transit District

For the agencies applying for small urban, make sure to select the small urban designation from the drop-down.

Lead (STF) Agency Contact Name

Peggy Greene

Lead (STF) Agency Contact Title

Grants Administrator

Lead (STF) Agency Contact Email Address

peggy.greene@cherriots.org

Lead (STF) Agency Contact Telephone No.

(503) 361-7530

This email address will receive the completed 5310 subrecipient application.

Select the type(s) of service that will be supported by this award. Select all that apply. See instructions for definitions.

- | | |
|--------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------|
| <input checked="" type="checkbox"/> Open to the general public at all times | <input type="checkbox"/> Open to the general public on a space-available basis |
| <input checked="" type="checkbox"/> Open only to seniors and individuals with disabilities | <input type="checkbox"/> Limited to defined clientele (e.g. residential home) |
| <input checked="" type="checkbox"/> Demand Response | <input type="checkbox"/> Deviated Route |

Are any FTA-funded buildings that your transit agency owns located in a flood zone?

[More information on floodplains](#)

- Yes
 No

Risk Assessment Information

Did your agency have any turnover of management or financial staff in the last two years?

- Yes
 No

Does your agency have an accounting system that allows you to completely and accurately track the receipt and disbursement of funds related to the award?

- Yes
 No

What type of accounting system does your agency use?

- Manual
 Automated
 Combined

Does your agency have a system in place that will account for 100 percent of each employee's time?

- Yes
 No

Did your staff members attend required trainings and meetings during prior grant award cycles?

- Yes
- No

Was your agency audited by the Federal government in the past two years?

- Yes
- No

Did your agency stay on budget in the past two years?

- Yes
- No

Transit Agency Projects

Transit Agency Project 1

Project Name

City of Woodburn's Mobility Management and Preventative Maintenance Programs

Project Details

Project Selection

- | | |
|----------------------------------------------------------------------|-----------------------------------------------------------------------------------|
| <input type="checkbox"/> A. Purchased Service | <input checked="" type="checkbox"/> B. Mobility Management |
| <input type="checkbox"/> C. Vehicle Purchase | <input checked="" type="checkbox"/> D. Capitalized Vehicle Preventive Maintenance |
| <input type="checkbox"/> E. Equipment, Signs and Amenities, Shelters | <input type="checkbox"/> F. Facilities: Bus Barns and Other Buildings |

Select the project types that you wish to include in your application. Select all that apply.

B. Mobility Management

1. Project Title

Project Title

Woodburn Transit Services' Mobility Management Program

2. Explain how your project is planned, designed, and carried out to meet the special needs of seniors and individuals with disabilities when general public transit is either insufficient, inappropriate, or not available:

Project Service Description

This project supports Woodburn Transit Services' (WTS) ability to provide high-quality transportation services that meet the needs of disabled and elderly residents. To provide greater mobility to its residents, WTS operates a Dial-a-Ride demand response program within Woodburn city limits. The service ensures that disabled and elderly residents unable to take traditional transportation routes have access to groceries, medicine, social, and other local resources. WTS facilitates passengers use of Dial-a-Ride through phone consultations and when needed, through home visits. WTS staff provides transportation suggestions and appropriate WTS services. Staff coordinates transportation services with providers and clients from local social service agencies, such as Adult & Family Services, Salud Clinic, and Senior & Disability Services.

WTS also operates a regional paratransit service: the Woodburn Out-of-Town Medical Transportation Program. Staff and volunteers drive disabled and elderly residents to medical appointments between Salem and Portland. Staff trains and coordinates volunteer drivers, provides program details to passengers, schedules rides, and coordinates drivers and vehicles. Volunteer drivers receive mileage reimbursements from WTS. City-owned modified minivans transport passengers who use mobility devices. This service is affordable to passengers and currently donation-based. WTS strives to make all of its paratransit services clean, safe, reliable, and affordable.

WTS promotes paratransit services through a variety of public outreach channels in different languages. These outreach channels include the City-operated Transit webpage and its social media sites, an electronic newsletter emailed to subscribers weekly, a local radio program, public meeting announcements, flyers, and bus stop signage. Paratransit schedules are available at City Hall, the Woodburn Public Library, local medical facilities, from drivers, and by mail. Because Spanish is the first language for thousands of Woodburn residents, communicating these services in Spanish is a priority. To better inform its non-English speaking residents about transportation services, the City adopted a Limited English Proficiency (LEP) program. Signs and service schedules are printed in both English and Spanish. City staff discuss new or changing Transit paratransit services on its local radio program broadcast in Spanish. Users of the City's Transit website can also translate its content into more than 50 different languages with the click of a button.

3. Project Type

Coordinating transportation services for older adults, individuals with disabilities, and individuals with low incomes

4. Project cost and match information:

Total Project Cost	Match Amount (Total Project Cost x 10.27%)	Grant Amount
104,000	\$10,680.80	\$93,319.20

5. Describe the source of your local match funds in the field below (examples: funds from your budget, STF funds). If the matching funds are not available now, describe when they will

be (examples: next fiscal year, month/year). Please be specific.

Local Match Details

Sources of matching funds will include STF formula funds & STIF formula funds, City general funds, and in-kind volunteer driver time.

6. On what page is project listed in the Adopted Coordinated Plan?

For multiple pages use this box

49, 52, 53

7. Date Coordinated Plan adopted:

9/9/2019

8. Identify the estimated number of customer contacts, customers trained, or mobility products/services produced. Describe the method you will use to measure output from the project:

Project Performance Goals

WTS facilitates the use of Dial-a-Ride by consulting with mobility-challenged passengers over the phone and by making home visits to assess their accessibility needs and offer transportation suggestions. Staff often coordinates transportation needs with clients and providers from local social service agencies, such as Adult & Family Services, Salud Clinic, and Senior & Disability Services. Staff will likely be in contact with an estimated 6,600 people annually to provide information about Woodburn's paratransit services and schedule trips, with approximately 30% being new riders trained to use City and regional paratransit transportation services. Customer contacts and ridership counts will be tracked by staff using Excel spreadsheets.

D. Capitalized Vehicle Preventive Maintenance

1. Describe how this project coordinates with other services to provide services to seniors and individuals with disabilities:

Project Coordination Description

The Preventive Maintenance Program is an essential component of Woodburn Transit Services' (WTS) ability to provide safe and reliable transportation services. Woodburn's Vehicle Preventive Maintenance Program helps WTS manage risk, improves safety, reduces operational costs, and maximizes equipment availability. This program funds WTS fleet maintenance of four full sized buses, three cutaways, and four minivans used in WTS' fixed and paratransit programs. WTS' preventive maintenance contractor employs ASE certified mechanics. WTS implements its Vehicle Preventative Maintenance Plan and stays current with all maintenance schedules. WTS also assess its vehicle inventory against passenger needs and the popularity of services. This program helps ensure that there are enough reliable vehicles to meet passenger needs. WTS also seeks new sources of vehicle capital, rotating out older vehicles in the fleet that have the most miles and mechanical repairs.

2. Is a Vehicle Preventive Maintenance Plan submitted with your application? A plan reflecting current fleet policies, fleet procedures, and vehicle and lift equipment manufacturer's recommended maintenance schedules is required.

Yes No

3. Number of vehicles included in this preventive maintenance project:

11

4. Project cost and match information:

Total Project Cost	Match Amount (Total Project Cost x 10.27%)	Grant Amount
121,000	\$12,426.70	\$108,573.30

5. Describe the source of your local match funds in the field below (examples: funds from your budget, STF funds). If the matching funds are not available now, describe when they will be (examples: next fiscal year, month/year). Please be specific.

Local Match Details

Matching funds come from STF formula funds, STIF formula funds, and City general funds.

6. On what page is project listed in the Adopted Coordinated Plan?

56

7. Date Coordinated Plan adopted:

9/9/2019

8. Is this project part of a group of activities or projects that are dependent on each other (for example, bus washing station dependant on facility)?

Yes No

Application Totals

Total Project Costs	Total Match Amount	Total Grant Amount
\$225,000.00	\$23,107.50	\$201,892.50

Submitting Your Application

- Click the “Save” button to save your work. A link to the application will appear that you can copy for future reference. Or, you can enter your email address to have the link emailed to you.
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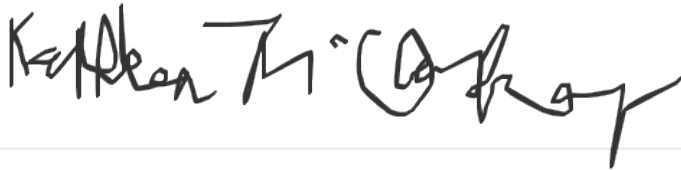
Supporting Documents (Optional)

Vehicle Maintenance Plan 2019-2021.rtf

The person signing this form must have the legal authority to submit the application on behalf of the applicant.

By electronically signing and submitting this form, the agency representative certifies that the information on the application is true and accurate to the best of their knowledge.

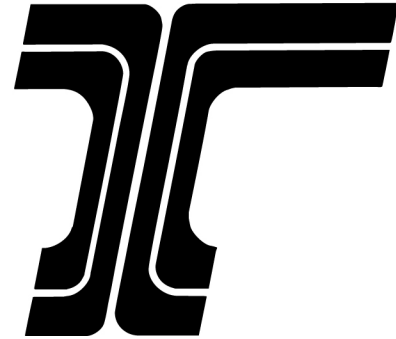
Signature



Printed Name

Kathleen McClaskey

Oregon Department of Transportation



Section 5310 Subrecipient Application FY 2021-23

Enhanced Mobility of Seniors and Individuals with Disabilities

This application is a tool provided to Subrecipients who want to apply to their STF agencies for 5310 projects.

Transit Agency

Transit Agency Legal Name

City of Silverton

Transit Agency DBA Name (Optional)

Silver Trolley

Agency Mailing Address (Street or PO Box)

306 S Water Street

Address Line 1

Silverton

City

Oregon

State

97381

Zip Code

Agency Contact Name

Jason Gottgetreu

Agency Contact Title

Community Development Director

Agency Contact Email Address

Jgottgetreu@silverton.or.us

Agency Contact Telephone No.

(503) 874-2212

Employer Identification Number (EIN)

93-6002256

Urbanized Zone

Salem area

Are you applying to a 5310 Agency or 5310 Small Urban Agency?

5310

Lead (STF) Agency

Lead (STF) Agency Name

Salem Area Mass Transit District

For the agencies applying for small urban, make sure to select the small urban designation from the drop-down.

Lead (STF) Agency Contact Name

Jolene White

Lead (STF) Agency Contact Title

Administrative Assistant

Lead (STF) Agency Contact Email Address

jolene.white@cherriots.org

Lead (STF) Agency Contact Telephone No.

503-361-7521

This email address will receive the completed 5310 subrecipient application.

Select the type(s) of service that will be supported by this award. Select all that apply. See instructions for definitions.

- Open to the general public at all times
- Open only to seniors and individuals with disabilities
- Demand Response
- Open to the general public on a space-available basis
- Limited to defined clientele (e.g. residential home)
- Deviated Route

Are any FTA-funded buildings that your transit agency owns located in a flood zone?

[More information on floodplains](#)

- Yes
- No

Risk Assessment Information

Did your agency have any turnover of management or financial staff in the last two years?

- Yes
- No

Does your agency have an accounting system that allows you to completely and accurately track the receipt and disbursement of funds related to the award?

- Yes
- No

What type of accounting system does your agency use?

- Manual
- Automated
- Combined

Does your agency have a system in place that will account for 100 percent of each employee's time?

Yes

No

Did your staff members attend required trainings and meetings during prior grant award cycles?

Yes

No

Was your agency audited by the Federal government in the past two years?

Yes

No

Did your agency stay on budget in the past two years?

Yes

No

Transit Agency Projects

Transit Agency Project 1

Project Name

Silver Trolley Preventative Maintenance

Project Details

Project Selection

A. Purchased Service

B. Mobility Management

C. Vehicle Purchase

D. Capitalized Vehicle Preventive Maintenance

E. Equipment, Signs and Amenities, Shelters

F. Facilities: Bus Barns and Other Buildings

Select the project types that you wish to include in your application. Select all that apply.

D. Capitalized Vehicle Preventive Maintenance

1. Describe how this project coordinates with other services to provide services to seniors and individuals with disabilities:

Project Coordination Description

The Silver Trolley is operated by the City of Silverton's Community Development Department and provides demand responsive (dial-a-ride) curb-to-curb service for the senior, disabled, special needs, youth, economically disadvantaged, and the general public.

The Silver Trolley provides free curb-to-curb service; drivers wait for an individual at the curb of a public street, in front or close to the rider's house, building, or other designated pick-up location as possible. For passenger drop offs, the driver drops the rider off at the sidewalk, or another safe waiting area next to the curb of a public street, in front or as close to the designated drop off location as possible.

Dispatch is available for ride scheduling Monday through Friday from 8:00 AM to 5:00 PM (Dispatchers will not be available to answer phones on Saturdays so all trips need to be made by Friday). There is 24 hour voicemail service available for after hour calls or if the line is busy. Dispatchers shall route and schedule each trip request at the time the reservation is made. Ride confirmation and "ready times" will be given to the rider. When at capacity, alternative times and/or days can be arranged, or the trip may be denied. Riders should expect the Trolley vehicle within 30 minutes of the arranged time (15 minutes before and 15 minutes after the scheduled time)

In order to provide the above service safely and efficiently proper vehicle maintenance is necessary.

2. Is a Vehicle Preventive Maintenance Plan submitted with your application? A plan reflecting current fleet policies, fleet procedures, and vehicle and lift equipment manufacturer's recommended maintenance schedules is required.

Yes No

3. Number of vehicles included in this preventive maintenance project:

3

4. Project cost and match information:

Total Project Cost	Match Amount (Total Project Cost x	Grant Amount
11,500	10.27%) \$1,181.05	\$10,318.95

5. Describe the source of your local match funds in the field below (examples: funds from your budget, STF funds). If the matching funds are not available now, describe when they will be (examples: next fiscal year, month/year). Please be specific.

Local Match Details

Local matching funds are provided via the City's General Fund each budget year.

6. On what page is project listed in the Adopted Coordinated Plan?

41

7. Date Coordinated Plan adopted:

9/2/2019

8. Is this project part of a group of activities or projects that are dependent on each other (for example, bus washing station dependant on facility)?

Yes No

Application Totals

Total Project Costs
\$11,500.00

Total Match Amount
\$1,181.05

Total Grant Amount
\$10,318.95

Submitting Your Application

- Click the “Save” button to save your work. A link to the application will appear that you can copy for future reference. Or, you can enter your email address to have the link emailed to you.
- Attach any supporting documents using the “Upload” button or by dragging documents from your computer to the "drag files here" area.
- Electronically sign your application by using the pen icon. Type your name in the “Printed Name” section.
- Submit your application by using the “Submit Application” button.
- IF YOU DO NOT RECEIVE AN EMAIL RESPONSE, PLEASE CONTACT US IMMEDIATELY AT 503-986-3300 OR ODOTPTDREPORTING@ODOT.STATE.OR.US.

Supporting Documents (Optional)

Silver Trolley-Maintenance Plan 2019.pdf

The person signing this form must have the legal authority to submit the application on behalf of the applicant.

By electronically signing and submitting this form, the agency representative certifies that the information on the application is true and accurate to the best of their knowledge.

Signature



Printed Name

Jason Gottgetreu



BOARD MEETING MEMO

Agenda Item G.4

To: Board of Directors

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

Thru: Allan Pollock, General Manager

Date: February 25, 2021

Subject: Adoption of Resolution No. 2021-04 to support the Statewide Transportation Improvement Fund Discretionary and Statewide Transportation Network Projects

ISSUE

Shall the Board adopt Resolution No. 2021-04 to support the Statewide Transportation Improvement Fund Discretionary and Statewide Transportation Network Projects for the 2022–2023 biennium?

BACKGROUND AND FINDINGS

In 2017, the Oregon State Legislature passed HB-2017 establishing the largest transportation funding bill ever passed in the state of Oregon. Included in HB-2017 was the first ever revenue source dedicated to public transportation statewide. This funding source was named the Statewide Transportation Improvement Fund (STIF). These funds are allocated on a biennial basis with the next funding cycle being for the 2022 and 2023 fiscal years and are divided into two allocation models. One is a formula distribution that was approved by the Board at the January 28, 2021 meeting. The other is a discretionary model with two parts, the STIF Discretionary, and the Statewide Transportation Network (STN) programs.

Applications for the STIF Discretionary and STN programs are submitted directly to ODOT – Public Transit Division (ODOT-PTD) directly from the Public Transportation Service Provider (PTSP). ODOT-PTD then reviews the applications for eligibility. After this screening, the projects are shared with the local Area Commission on Transportation (ACT), and the local Qualified Entity (QE) which is the Salem Area Mass Transit District for Marion and Polk counties. The ACT and QE review is to determine if they support or reject the projects and

then provide a record of this decision to ODOT – PTD. The project list and applications reviewed for support include not just projects based in the QE’s area, but any proposed project that crosses through or into the QE’s area.

A summary of the projects requesting funding are shown below in Table 1. A copy of the project plans have been provided in **Attachment A**. The process prescribed by ODOT – PTD requires QEs to formally support or reject each proposed project either individually or as a collective group.

TABLE: 1 – Project Requests

PTSP Name	Project Description	Project Total Request
SAMTD	Project 1 – Purchase 4 smaller buses for micro-transit circulator/coverage service.	\$ 655,956
SAMTD	Project 2 – Design / engineering, environmental process completion, and assist with land purchase for South Salem Transit Center development.	\$ 750,000
City of Woodburn	Operating revenue for the Volunteer Out-of-Town Medical Transportation Program	\$ 143,000
Benton County (in partnership with Yamhill County)	99W Corridor Pilot Project – 2 buses (\$350,000), 4 shelters (\$100,000), planning (\$20,000), project administration (\$40,000), operating (\$145,600), preventative maintenance (\$12,000).	\$ 667,600
Tillamook County TD	Route 60X Coastal Connector – Purchase one bus (\$220,000), Operating (\$493,000), preventative maintenance (\$80,000)	\$ 793,000
Yamhill County (in partnership with Benton County)	99W Corridor Pilot Project – 2 buses (\$350,000), 2 shelters (\$50,000), planning (\$20,000), project administration (\$90,000), operating (\$270,400).	\$ 780,400

The Statewide Transportation Improvement Fund Advisory Committee (STIFAC) met on February 11, 2021 to review and make a recommendation to support the projects identified in Table 1.

As with the STIF Formula funds, using these 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. The purpose of the STIF Discretionary and STN programs is to enhance transit service throughout the state.

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 SAMTD, and respectively for other PTSPs in Marion County.

RECOMMENDATION

The STIFAC recommends the Board adopt Resolution No. 2021-04 to support the Statewide Transportation Improvement Fund Discretionary and Statewide Transportation Network Projects for the 2022 – 2023 biennium.

PROPOSED MOTION

I move that the Board adopt Resolution No. 2021-04 to support the Statewide Transportation Improvement Fund Discretionary and Statewide Transportation Network Projects for the 2022 – 2023 biennium.



Resolution No. 2021-04

Approval of the projects and project costs proposed for funding through the STIF Discretionary and STN programs for the 2022-2023 biennium;

WHEREAS, the Salem Area Mass Transit District, hereafter referred to as "District," is designated as the Qualified Entity (QE) in the Statewide Transportation Improvement Fund Program; and,

WHEREAS, District is designated the QE for Marion and Polk Counties under ORS 184.751 and OAR 732-040-0005 (5) (c) and 732-040-0005 (26); and,

WHEREAS, the governing body for the QE conducts a review of projects submitted for funding from the STIF Discretionary and Statewide Transportation Network (STN) within the QE Area of Responsibility; and,

WHEREAS, as a result of the review, and in accordance with OAR 732-040-0030 will take action identifying which projects to support for funding; and,

WHEREAS, Table 1 contains the projects and project costs proposed for funding through the STIF Discretionary and STN programs for the 2022-2023 biennium;

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

THAT, the Board adopt Resolution No. 2021-04 to approve the list of projects and funding amounts identified in Table 1 in this resolution; and direct the General Manager to submit a record of the decision by the Board by March 15, 2021 as is required by the Oregon Department of Transportation.

ADOPTED by the SAMTD Board of Directors on the 25th day of February 2021, and effective thereupon.

ATTEST:

President
Board of Directors

Secretary
Board of Directors



RESOLUTION 2021-04 continued

TABLE: 1 – Project Requests

PTSP Name	Project Description	Project Total Request
SAMTD	Project 1 – Purchase 4 smaller buses for micro-transit circulator/ coverage service.	\$ 655,956
SAMTD	Project 2 – Design/engineering, environmental process completion, and assist with land purchase for South Salem Transit Center development.	\$ 750,000
City of Woodburn	Operating revenue for Volunteer Out-of-Town Medical Transportation Program	\$ 143,000
Benton County <i>(Yamhill County partnership)</i>	99W Corridor Pilot Project – 2 buses (\$350,000), 4 shelters (\$100,000), planning (\$20,000), project administration (\$40,000), operating (\$145,600), preventative maintenance (\$12,000)	\$ 667,600
Tillamook County TD	Route 60X Coastal Connector – Purchase one bus (\$220,000), operating (\$493,000), preventative maintenance (\$80,000)	\$ 793,000
Yamhill County <i>(Benton County partnership)</i>	99W Corridor Pilot Project – 2 buses (\$350,000), 2 shelters (\$50,000), planning (\$20,000), project administration (\$90,000), operating (\$270,400)	\$ 780,400

Oregon Department of Transportation



STIF Discretionary and Statewide Transit Network Application: FY 2021-23

Applicant Information

Agency Legal Name

Salem Area Mass Transit District

Agency Legal Address

555 Court St NE, Suite 5230, Salem, Oregon 97301

Application Contact Name

Peggy Greene

Application Contact Title

Grants Administrator

Application Contact Email Address

peggy.greene@cherriots.org

Application Contact Phone Number

(503) 999-4643

Name of Person Signing Agreement

Allan Pollock

Title of Person Signing Agreement

General Manager

Email Address of Person Signing Agreement

allan.pollock@cherriots.org

Phone Number of Person Signing Agreement

(503) 588-2424

Agency Information

1. Transit Agency Type

Mass Transit District

1.A Does the agency have any existing grant agreements with ODOT?

Yes

2. What is the main type of service that will be supported by this award?

Fixed Route

3. Would this award support ongoing operations of an existing service?

Yes

3.A Operations costs of

previous quarter

\$281,683.00

3.B Brief history of current project/service. What, if any, elements of the proposed project differ from existing efforts and services?

The small bus project is being proposed to better meet the needs of the community and provide the tools to reach farther into the neighborhoods with a less intrusive sized vehicle. The small buses would be initially used on routes like 26 Glen Creek /Orchard Heights, 27 Glen Creek / Eola and 14 Windsor Island Road. These are coverage routes that smaller buses would be able to handle ridership and be a better fit for the neighborhood streets that they serve.

Risk Assessment Information

4. Did your agency have any turnover of management or financial staff in the last two years?

Yes

5. Does your agency have an accounting system that allows you to completely and accurately track the receipt and disbursement of funds related to the award?

Yes

6. What type of accounting system does your agency use?

Combined

7. Does your agency have a system in place that will account for 100 percent of each employee's time?

Yes

8. Did your staff members attend required training and meetings during the previous biennium?

Yes

9. Was your agency audited by the federal government in the past two years?

No

10. Did your agency stay on budget in the past two years?

Yes

Agency Qualifications

11. Describe how your agency has the legal, managerial and operational capacity to perform and report on project progress within the scope, schedule and budget of the anticipated grant agreement. (Description of operational capacity should apply specifically for the workload of projects in this application.)

SAMTD has the legal authority, capacity, and ability to implement the project. There are no outstanding legal issues that would, individually or in the aggregate, impair the ability of SAMTD to implement the project. SAMTD has dedicated procurement, grants, project management, and operations staff who coordinate projects from planning to closeout. With this grant application, staff have time and budgetary authority to allocate resources to accomplish the project. They will also report on the project progress on a quarterly basis as is required by the ODOT Public Transportation Division for all of the grants issued to qualified entities and public transportation service providers.

12. Certification of Compliance

By checking this box, the applicant certifies that if they are awarded funding, they will meet and

ensure compliance for the term of the agreement with applicable federal, state and local laws and regulations including, and not limited to, those pertaining to passenger transportation, civil rights, labor, insurance, safety and health.

Yes

13. Do you plan to use a Sub-Recipient or contractor to implement the grant supported activity?

No

14. If you seek the 10 percent match reduction, does the project meet one or more of the four factors identified in OAR 732-044-0005(4)(a)? Select each factor that you believe is exemplified by the proposed project.

Not applying for 10% match reduction

15. Will federal funds be used to complete this project?

Yes

Project Information

16.A Project Title

Small Buses for Cherriots Local Service

16.B Describe the project to be funded. Clearly describe what the requested fund award would be used to accomplish, detailing the specific tasks and deliverables. Where relevant, identify the origin and destination of the proposed service as well as each municipality visited along the route. Please see page 22 of program guidance for additional guidance on writing a project description.

This project is to add 4 low floor cutaway buses to be operated within the urban growth boundary of the Cherriots service area. These buses will help with right-sizing vehicle size to some of the areas that we serve. The buses would start by serving our neighborhood circulator routes in Salem and Keizer with the option of using them as we explore options for micro-transit in the future. They also serve as expansion vehicles to allow the use of our larger buses to add frequency or new routes. In order to add additional weekday service during the peaks, we need additional vehicles.

17. What Local Plans include this project or elements of the project? Be specific in the citation of the Local Plans.

The 2017 Needs Assessment Report, p. 58. "Add more frequency on current routes." and:

"Add more coverage

o D Street

o Turner road

o College Drive NW

o Woodburn to Keizer Transit Center

o Service between Marion County Correctional Facility and South Commercial"

18. Please provide specific page(s) of the Local Plan(s) where project or funding need is listed.

p. 58

19. What is the minimum grant amount that will still allow your project to proceed?

\$524,764.80

20. Select the fund source(s) for which you would like to compete and that you believe your project is eligible to receive. Check all that apply.

STIF Discretionary

21. Rank the fund sources in the order of preference with 1 being first choice and 3 being the last

choice.

STIF Discretionary

1

STIF Intercommunity Discretionary

No Preference

FTA Section 5311(f) Intercity

No Preference

22. Why is this an important project? What are the consequences of this project not receiving funding?

This project will allow Cherriots to meet the desires of the community to not run 35' to 40' buses on small neighborhood streets with small passenger loads. Additionally this would let us reach farther into neighborhoods where larger vehicles can not provide more access to transit in the community. This will also make adding frequency or routes to our system feasible. During peak pullout there is no room for expansion because all buses are currently deployed and there is not any more capacity for expanding service. If not awarded the funds to add to our fleet, it would limit how we can meet the needs of the community and operate deeper into the service area providing reduced walking for vulnerable populations.

23. Will this project involve breaking ground or any other activity that might require environmental review per federal requirements?

No

Oregon Transportation Commission Investment Priorities

Equity and Public Transportation Service to Low-Income Households

24. Describe how this project would support and improve access for vulnerable populations and/or historically marginalized communities.

The project would allow Cherriots to reach deeper into our community and explore operating service as we do today as well as micro transit or more dynamic service. Data from the U.S. Census American Community Survey (2014-2018) shows that 35.6% of the population within the Salem-Keizer urban growth boundary (UGB) are low-income households living below 200% of the Federal Poverty Level. This is slightly less than the average for Marion and Polk counties, which is 36.9%. The minority population is 21% of the total for the Salem-Keizer UGB, which is slightly lower than the average for Marion and Polk counties, which is 31.8%.

Coordination of Public Transportation Services

25. Describe how this project would improve the passenger experience, benefit multiple transit providers, or involve consolidation, coordination, or resource sharing between agencies, including use of transportation data and technology.

The project will add more coverage and more frequency for current routes. With smaller buses Cherriots would be able to explore traveling down streets into neighborhoods that we cannot at this time, due to vehicle size constraints. This would provide better access for people who currently have a long walk to reach transit service.

Environmental and Public Health

26. Describe how this project would go beyond providing an alternative to personal car use to reduce greenhouse gas emissions, reduce pollution, and/or support positive health outcomes.

As more people access public transportation services, the number of vehicles on the roads will decrease and thereby decrease/reduce greenhouse gas emissions and pollution. In many locations throughout the Cherriots transit network the walking distance is more than a half mile, which is prohibitive for many individuals. Reducing walking distance and improving access in neighborhoods will increase ridership of vulnerable populations and the general public.

The project also promotes positive health outcomes by providing individuals with accessible, low-cost transportation. Seniors, individuals with disabilities, individuals living below the poverty line, refugees, veterans, as well as general populations will be have better access to jobs, education, healthcare appointments, food and non-food shopping, and recreational opportunities that they may not have been able to afford without public transportation.

Safety, Security, and Community Livability

27. Describe how the project would increase use and participation in active transportation, including public transportation.

With better coverage of the Cherriots service area, transit becomes a viable option for more people. The project reduces walking distances and lowers barriers to accessing public transportation for people with limited mobility or other health concerns as well as improving safety during inclement weather.

28. Describe how the project would support and improve safety of passengers in transit vehicles and safety of other roadway users.

The project expands services and decreases walking distances, keeping passengers from walking on unsafe streets without sidewalks to reach bus stops. Increasing public transit ridership gets people out of cars and onto buses which has the potential to decrease traffic and increase safety for all roadway users.

Statewide Transit Network Connections

29. Describe how this project would support and improve the utility and connectivity of the Statewide Transit Network and/or create a foundation for future Statewide Transit Network improvements.

This project would enable Cherriots to provide higher frequency connections to the Cherriots Regional bus network as well as other regional providers, therefore improving the utility of the statewide transit network.

Funding and Strategic Investment

30. Describe how the project match requirements will be met or exceeded. Describe why investment in this project makes sense from both the perspective of current need and long term Oregon transit needs.

The Transit District will match the grant at the 20% rate using SAMTD's general fund, non-federal, local funds. The project can be completed within the grant biennium time frame. Once a bus is purchased, the bus is maintained by SAMTD maintenance staff which is an annual budgeted expense. Investing in buses ensures the ability of the District to provide transportation.

31. If this project will last beyond the 2021-23 biennium, describe the plan for ongoing funding including match. If not applicable, type N/A.

N/A

32. Does this project depend on other funding sources including other discretionary grants whose outcomes are uncertain? If yes, please list those fund sources. If not applicable, type N/A.

N/A

33. Capital Asset Purchases

Describe proposed capital purchases. If no capital assets are included in your application, type N/A.

The proposed capital purchases for this grant are:
Four 12 to 16 passenger low floor cutaway buses. They would all be 20 to 25 feet in length, with wheelchair lifts.

Project Details

Task Category
Vehicle Purchase

Vehicle Purchase

Is this a vehicle expansion, vehicle replacement, or both?
Vehicle Expansion

Vehicle Expansion

Will you use the Oregon state price agreement contract?
Yes

Will this grant award support purchase of a used vehicle?
No

Vehicles to be purchased

Vehicle ALI	Make/ Model	Quantity	Cost Each	Total	# of seats / # ADA stations	# of seats with ADA deployed	Fuel System	Est. Order Date	Est. D elivery Date
11.12.04 Bus < 30 FT	Glavel	4	\$163,989.0 0	\$655,956.0 0	15	11	Gas (G)	9/30/20 21	8/31/2 022

Total:
4

**Grand
Total:**
\$655,956.0
0

Total Project Cost (Grant Amount + Match Amount)
\$655,956.00

Are matching funds available if the project is awarded?
Yes

Percent of funds to be used for fixed route transportation
100%

Project Task and Match Amounts

20% Match Rate Calculations

**Grant Amount - STIF Discretionary/STIF
Intercommunity/5311f (80% State/Fed Share)**
\$524,764.80

**Match Amount - STIF Discretionary/STIF
Intercommunity/5311f (20% Local Share)**
\$131,191.20

Application Totals

Match Sources

Match Sources	Amount
Local	\$131,191.20

Note on Application Totals: If applying for 5311(f) Operating, a 50% match rate is applied to identified Operating costs. However, the application form automatically applies a 20% match rate to the full Project Cost, including Operating costs. Therefore, Section 5311(f) applicants should ensure the accuracy of the Total Task Cost for each Task Category, as the 20% match rate will only apply to non-Operating costs in a 5311(f) grant award. The form is unable to calculate an accurate application total using two different match rates.

20% Match Rate Calculations

Grant Amount
\$524,764.80

Match Amount
\$131,191.20

Oregon Department of Transportation



STIF Discretionary and Statewide Transit Network Application: FY 2021-23

Applicant Information

Agency Legal Name

Salem Area Mass Transit District

Agency Legal Address

555 Court Street NE, Suite 5230, Salem, Oregon 97301

Application Contact Name

Peggy Greene

Application Contact Title

Grants Administrator

Application Contact Email Address

peggy.greene@cherriots.org

Application Contact Phone Number

(503) 999-4643

Name of Person Signing Agreement

Allan Pollock

Title of Person Signing Agreement

General Manager

Email Address of Person Signing Agreement

allan.pollock@cherriots.org

Phone Number of Person Signing Agreement

(503) 588-2424

Agency Information

1. Transit Agency Type

Mass Transit District

1.A Does the agency have any existing grant agreements with ODOT?

Yes

2. What is the main type of service that will be supported by this award?

Fixed Route

3. Would this award support ongoing operations of an existing service?

No

Risk Assessment Information

4. Did your agency have any turnover of management or financial staff in the last two years?

Yes

5. Does your agency have an accounting system that allows you to completely and accurately track the receipt and disbursement of funds related to the award?

Yes

6. What type of accounting system does your agency use?

Combined

7. Does your agency have a system in place that will account for 100 percent of each employee's time?

Yes

8. Did your staff members attend required training and meetings during the previous biennium?

Yes

9. Was your agency audited by the federal government in the past two years?

No

10. Did your agency stay on budget in the past two years?

Yes

Agency Qualifications

11. Describe how your agency has the legal, managerial and operational capacity to perform and report on project progress within the scope, schedule and budget of the anticipated grant agreement. (Description of operational capacity should apply specifically for the workload of projects in this application.)

SAMTD has the legal authority, capacity, and ability to implement the project. There are no outstanding legal issues that would, individually or in the aggregate, impair the ability of SAMTD to implement the project. SAMTD has dedicated procurement, grants, project management, and operations staff who coordinate projects from planning to closeout. With this grant application, staff have time and budgetary authority to allocate resources to accomplish the project. They will also report on the project progress on a quarterly basis as is required by the ODOT Public Transportation Division for all of the grants issued to qualified entities and public transportation service providers.

12. Certification of Compliance

By checking this box, the applicant certifies that if they are awarded funding, they will meet and ensure compliance for the term of the agreement with applicable federal, state and local laws and regulations including, and not limited to, those pertaining to passenger transportation, civil rights, labor, insurance, safety and health.

Yes

13. Do you plan to use a Sub-Recipient or contractor to implement the grant supported activity?

Yes

13.A If Yes, please list the Sub-Recipient(s) and describe how the applicant will provide sufficient Sub-Recipient/contractor oversight to ensure eligibility is maintained while receiving STIF Discretionary or Statewide Transit Network moneys.

The project is for the acquisition of property, design and engineering, and NEPA process for the development of the South Salem Transit Center. These functions will be completed through consultants and contracted services that will be procured through an appropriate solicitation process for the type of services to be provided.

14. If you seek the 10 percent match reduction, does the project meet one or more of the four factors identified in OAR 732-044-0005(4)(a)? Select each factor that you believe is exemplified by the proposed project.

Not applying for 10% match reduction

15. Will federal funds be used to complete this project?

Yes

Project Information

16.A Project Title

South Salem Transit Center - Land, Design/Engineering, Environmental

16.B Describe the project to be funded. Clearly describe what the requested fund award would be used to accomplish, detailing the specific tasks and deliverables. Where relevant, identify the origin and destination of the proposed service as well as each municipality visited along the route. Please see page 22 of program guidance for additional guidance on writing a project description.

Salem Area Mass Transit District (SAMTD) has hired a consultant to complete a site selection process for the South Salem Transit Center (SSTC). This process will be evaluating a set of criteria to identify a preferred site, with possible supporting super-stops in south Salem. The next steps in this project once the site selection process is complete will be the acquisition of property, NEPA evaluation, and the design and engineering of the facilities. Federal Transit Administration grants have been identified to pay for the majority of the cost of these activities, with the STIF Discretionary grant providing the local match for the project.

The current site selection process is anticipated to be complete by mid 2022.

17. What Local Plans include this project or elements of the project? Be specific in the citation of the Local Plans.

SKATS 2011-2035 RTSP

SKATS 2017 - 2023 TIP

Cherriots 2017 Needs Assessment Report on p. 68 and 71

18. Please provide specific page(s) of the Local Plan(s) where project or funding need is listed.

SKATS 2011 - 2035 RTSP Project List p. 2, SKATS 2017 - 2023 TIP FY18, FY19, FY20 FTA Section 5339 funding allocated to the SSTC, Cherriots 2017 Needs Assessment Report on p. 68 and 71

19. What is the minimum grant amount that will still allow your project to proceed?

\$450,738.00

20. Select the fund source(s) for which you would like to compete and that you believe your project is eligible to receive. Check all that apply.

STIF Discretionary

STIF Intercommunity Discretionary

21. Rank the fund sources in the order of preference with 1 being first choice and 3 being the last choice.

STIF Discretionary

1

STIF Intercommunity Discretionary

2

FTA Section 5311(f) Intercity

No Preference

22. Why is this an important project? What are the consequences of this project not receiving funding?

As south Salem has continued to grow, both with residential and commercial development, the delivery of efficient customer friendly transit services are becoming more and more challenging to provide. Additionally, regional travel from people commuting from the Albany/Corvallis area has been increasing and with the possibility of commuter service being provided between the two areas, there is no convenient location to connect to the service in south Salem at this time. This project would create a transit center with possible supporting transfer locations to allow for the integration of micro-mobility, micro-transit, commuter service, TNC's, and other services to have a customer friendly and efficient location to connect to a variety of options. This would also provide a convenient location for inter-city connections to the south without having to continue for another 15 - 20 minutes into downtown. This improvement could allow for more frequency on the commuter route. The other factor is the need for a customer friendly location to transfer between services to routes that will connect the Mill Creek Corporate Center to the residential areas in the Commercial, Sunnyside, and Liberty corridors. This is an important connection to hundreds of jobs in the local area.

Without this infrastructure in place, it is hard to establish circulator routes that do not go to downtown Salem because operator layover and recovery locations are necessary for normal operations practices. A facility such as this is also necessary to provide a transfer point between routes and/or other modes. It is very difficult to do this effectively without dedicated facility infrastructure.

23. Will this project involve breaking ground or any other activity that might require environmental review per federal requirements?

No

Oregon Transportation Commission Investment Priorities

Equity and Public Transportation Service to Low-Income Households

24. Describe how this project would support and improve access for vulnerable populations and/or historically marginalized communities.

The lower levels of coverage service provided by mainline fixed route bus service allows for gaps to exist for vulnerable or historically marginalized communities from using public transportation as a viable alternative to owning and operating a car. In order for solutions such as micro-transit or micro-mobility to function well, a facility needs to exist to accommodate the integration of traditional fixed route bus service with more efficient alternatives that can provide more efficient coverage service to neighborhoods, and to connect to jobs in business park environments.

Using remix to pull demographic data from the Census block groups in the study area, approximately 33% of the population are ethnic minorities and 45% are considered low-income (with household incomes at 200% of the federal poverty level or below). Therefore, a transit facility in this area would benefit historically

underprivileged groups and those who may have to rely on public transportation more often than others.

Coordination of Public Transportation Services

25. Describe how this project would improve the passenger experience, benefit multiple transit providers, or involve consolidation, coordination, or resource sharing between agencies, including use of transportation data and technology.

For the same reasons expressed in the answer to question 24, the improvement of access will benefit everyone who lives or works within a convenient distance of newly developed service options that enhance the customer's experience with public transportation. The south Salem Transit Center will allow for the coordination of these services. This center would also accommodate other services not provided by SAMTD to drop off and pick up customers needing to conveniently transfer from one service to another.

Environmental and Public Health

26. Describe how this project would go beyond providing an alternative to personal car use to reduce greenhouse gas emissions, reduce pollution, and/or support positive health outcomes.

SAMTD is committed to being as inclusive as possible of energy efficient, environmentally friendly construction practices, and that the design of the facility includes energy saving elements that minimize any negative impact on the environment. This was demonstrated in the construction of the Keizer Transit Center. It includes the following elements: extensive use of solar production in shelter, awning, and half of the building roof, green roof on the other half of the roof to minimize storm-water runoff, rain gardens and bio-swales to treat all storm-water runoff prior to leaving the site, native drought tolerant plantings, LED and CFL lighting, ground-source heat-pump, solar interior lighting, smart-building technology, and electric vehicle charging stations. This same commitment would be required in the South Salem Transit Center project.

Safety, Security, and Community Livability

27. Describe how the project would increase use and participation in active transportation, including public transportation.

In addition to motorized transportation options, the facility will be designed to be fully supportive of active transportation such as bicycling, walking, scooters, etc. The facility design will allow for the accommodation of bikeshare / scooter share options, as well as having ample bicycle parking available. Pedestrian access to the facility will be a very high priority as well in order to encourage walking to the location if the origin or destination is within a reasonable walking distance.

28. Describe how the project would support and improve safety of passengers in transit vehicles and safety of other roadway users.

Safety and security are essential elements of any facility project with SAMTD. The design of the project must incorporate a Crime Prevention through Environmental Design (CPTED). This approach incorporates facility design elements that create an environment with natural surveillance (open visible with natural presence of people in open spaces), natural access control (using design to safely direct and route customers through the site while minimizing points of conflict or hazard), and natural territorial reinforcement (design that through design clearly delineates the boundaries of the facility and creates natural barriers to intrusion in undesired locations). In addition to these design elements, extensive security cameras, access control to buildings, ample lighting, and the use of district contracted security services.

Statewide Transit Network Connections

29. Describe how this project would support and improve the utility and connectivity of the Statewide Transit Network and/or create a foundation for future Statewide Transit Network improvements.

The site selection process currently underway includes the need to connect conveniently with inter-city services. This is especially important for services coming from locations to the south of the Salem/Keizer area. It is intended that this facility would accommodate the connection of inter-city service to frequent core network service. This connection could be with more than one service.

Funding and Strategic Investment

30. Describe how the project match requirements will be met or exceeded. Describe why investment in this project makes sense from both the perspective of current need and long term Oregon transit needs.

The funds in from this grant will be used to match at least \$1,802,953 in FTA Section 5339 funds. This allows for a significant leveraging of federal dollars with these STIF funds.

The budget section in this form does not provide a place to properly show overmatch, so the amount in the budget section is only showing the FTA Section 5339 needed to match the requested amount of STIF Discretionary or STN funds. The full budget including the overmatch is as follows:

STIF Discretionary / STN - \$600,000
 FTA Section 5339 match - \$150,000
 FTA Section 5339 overmatch - \$1,652,953
 Total Project Including all 3 parts - \$2,402,953

31. If this project will last beyond the 2021-23 biennium, describe the plan for ongoing funding including match. If not applicable, type N/A.

The previously identified FTA Section 5339 funds will be available to complete this phase of the project for any portion that would continue beyond the 2021-2023 biennium.

32. Does this project depend on other funding sources including other discretionary grants whose outcomes are uncertain? If yes, please list those fund sources. If not applicable, type N/A.

No, the FTA Section 5339 funds are from FY18, FY19, and FY20 and have been allocated by SAMTD to this project.

33. Capital Asset Purchases

Describe proposed capital purchases. If no capital assets are included in your application, type N/A.

The project in this application includes the purchase of property for the construction of the South Salem Transit Center. All other expenditures will be for the completion of the design and engineering of the facility, as well as the NEPA process.

Project Details

Task Category

Facility Purchase

Facility Purchase

Facility Request

Facility Description (Major activities, Siting and Right-of-Way, Planning, Architecture, Engineering, Project	Quantity	Cost Each (Project Cost)	Total Cost	Est. Order Date	Est. Delivery Date
---------------------------------------------------------------------------------------------------------------	----------	--------------------------	------------	-----------------	--------------------

Management, Construction Contracting, Inspecting and Permitting, Interior Surfaces and Furnishings)

Purchase Land	1	\$500,000.00	500,000.00	11/17/2022	1/27/2023
		0			
Design and engineering	1	\$200,000.00	200,000.00	6/29/2023	1/15/2024
		0			
Completion of the required NEPA process	1	\$50,000.00	50,000.00	11/15/2023	3/22/2024

**Grand Total:
750,000.00**

Total Task Cost (Grant Amount + Match Amount)
\$750,000.00

Are matching funds available if the project is awarded?

Yes

Percent of funds used for fixed route transportation

100%

Project Task and Match Amounts

20% Match Rate Calculations

Grant Amount - STIF Discretionary/STIF Intercommunity/5311f (80% State/Fed Share)
\$600,000.00

Match Amount - STIF Discretionary/STIF Intercommunity/5311f (20% Local Share)
\$150,000.00

Application Totals

Match Sources

Match Sources	Amount
Federal FTA Section 5339	\$1,082,953.00

Note on Application Totals: If applying for 5311(f) Operating, a 50% match rate is applied to identified Operating costs. However, the application form automatically applies a 20% match rate to the full Project Cost, including Operating costs. Therefore, Section 5311(f) applicants should ensure the accuracy of the Total Task Cost for each Task Category, as the 20% match rate will only apply to non-Operating costs in a 5311(f) grant award. The form is unable to calculate an accurate application total using two different match rates.

20% Match Rate Calculations

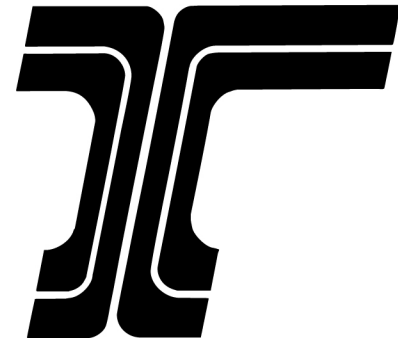
Grant Amount

Match Amount

\$600,000.00

\$150,000.00

Oregon Department of Transportation



STIF Discretionary and Statewide Transit Network Application: FY 2021-23

Applicant Information

Agency Legal Name

City of Woodburn

Agency Legal Address

270 Montgomery St, Woodburn, Oregon 97071

Application Contact Name

Kathleen McClaskey

Application Contact Title

Transit Manager

Application Contact Email Address

kathleen.mcclaskey@ci.woodburn.or.us

Application Contact Phone Number

(503) 982-5245

Name of Person Signing Agreement

Scott Derickson

Title of Person Signing Agreement

City Administrator

Email Address of Person Signing Agreement

Scott.Derickson@ci.woodburn.or.us

Phone Number of Person Signing Agreement

(503)982-5230

Agency Information

1. Transit Agency Type

City

1.A Does the agency have any existing grant agreements with ODOT?

Yes

2. What is the main type of service that will be supported by this award?

Demand Response

3. Would this award support ongoing operations of an existing service?

Yes

3.A Operations costs of

previous quarter
\$17,000.00

3.B Brief history of current project/service. What, if any, elements of the proposed project differ from existing efforts and services?

Woodburn Transit started the Woodburn Volunteer Out-of-Town Medical Transportation Program (WVMT) in 1975, providing Woodburn's disabled and elderly residents with rides to and from out-of-town medical appointments. WVMT continues to serve as a lifeline for residents who have few transportation options and are in need of medical care. Last year, WVMT made 1,355 trips and covered 40,000 miles, transporting Woodburn residents north to Portland (73 miles rt) and south to Salem (40 miles rt). Approximately 17% of program passengers are non-ambulatory, while 83% are ambulatory. Volunteers donate their time as drivers. The City administers WVMT and provides operational support transporting riders with large mobility devices and driving passengers when volunteers are unavailable. The proposed project does not differ significantly from existing services.

Risk Assessment Information

4. Did your agency have any turnover of management or financial staff in the last two years?

Yes

5. Does your agency have an accounting system that allows you to completely and accurately track the receipt and disbursement of funds related to the award?

Yes

6. What type of accounting system does your agency use?

Combined

7. Does your agency have a system in place that will account for 100 percent of each employee's time?

Yes

8. Did your staff members attend required training and meetings during the previous biennium?

Yes

9. Was your agency audited by the federal government in the past two years?

No

10. Did your agency stay on budget in the past two years?

Yes

Agency Qualifications

11. Describe how your agency has the legal, managerial and operational capacity to perform and report on project progress within the scope, schedule and budget of the anticipated grant agreement. (Description of operational capacity should apply specifically for the workload of projects in this application.)

The City of Woodburn's full time staff will be able to provide all necessary grant administration and fulfill the scope of the grant agreement. Staff involved in grant oversight will include the Woodburn Transit Manager and the Special Program Manager, within input by the Assistant City Administrator. These staff are successfully managing a STIF FY19-21 grant award, overseeing implementation of three new service routes, and providing ODOT and Salem Area Mass Transit District with quarterly progress reports and reimbursement requests. These staff also have experience completing a FY20 STIF Discretionary grant. The City has adequate legal and financial capacity to support program staff and complete the grant's

scope of work.

12. Certification of Compliance

By checking this box, the applicant certifies that if they are awarded funding, they will meet and ensure compliance for the term of the agreement with applicable federal, state and local laws and regulations including, and not limited to, those pertaining to passenger transportation, civil rights, labor, insurance, safety and health.

Yes

13. Do you plan to use a Sub-Recipient or contractor to implement the grant supported activity?

No

14. If you seek the 10 percent match reduction, does the project meet one or more of the four factors identified in OAR 732-044-0005(4)(a)? Select each factor that you believe is exemplified by the proposed project.

Predominantly serves or provides access to and from rural communities

15. Will federal funds be used to complete this project?

Yes

Project Information

16.A Project Title

Woodburn Volunteer Out-of-Town Medical Transportation Program (WVMT)

16.B Describe the project to be funded. Clearly describe what the requested fund award would be used to accomplish, detailing the specific tasks and deliverables. Where relevant, identify the origin and destination of the proposed service as well as each municipality visited along the route. Please see page 22 of program guidance for additional guidance on writing a project description.

The Woodburn Volunteer Out-of-Town Medical Transportation program has grown over the years; however, program revenue is not currently keeping pace with costs (FY20 internal assessment). Program costs in FY20 totaled approximately \$68,000. City general funds and passenger donations are providing the two main sources of WVMT program revenue, along with some 5311 and 5310 federal funding for volunteer mileage reimbursements and vehicle maintenance. Average annual program donations are \$9,000. The goal of this project is to support Woodburn Transit's paratransit out-of-town medical trip requests over the next two years (FY22-23), while providing the City with time to put into place longer term, sustainable program financing and related activities. Annual project costs include two part time City employees who drive non-ambulatory and ambulatory riders to appointments (\$31,000), fuel (\$3,000), and some vehicle maintenance for the three Transit vehicles used for the project (\$11,000). Two to four volunteers typically participate in the program as drivers and use their own vehicles to transport ambulatory passengers to medical appointments. WVMT program costs include these volunteer reimbursements at 57.5 cents per mile, the current rate set by the Internal Revenue Service (\$23,000). Five percent of total costs are also included for project administration and grant management (\$3,400). WVMT has a project goal of providing 1,350 trips annually, transporting Woodburn residents from their homes to medical appointments between Portland in the north and Salem in the south. During this time, City staff will develop passenger fare options that can more adequately support program costs and present them to City Council. City staff will also research the feasibility of working with regional businesses or non-profit agencies to coordinate Medicaid-eligible rides for Woodburn residents. City staff will assess program costs and see where modifications can be made for greater program efficiencies.

17. What Local Plans include this project or elements of the project? Be specific in the citation of the Local Plans.

The City of Woodburn's current Transit Plan, updated in 2010, developed a vision statement to guide Woodburn's public transportation services. The vision was to provide clean, safe, reliable, efficient, sustainable, and affordable public transportation for people traveling within Woodburn with a focus on those who do not have other transportation options; and to strive to provide residents, visitors, and workers traveling to and from Woodburn with efficient and convenient regional connections. The Woodburn Volunteer Out-of-Town Medical Transportation Program (WVMT) fulfills the vision of this plan by focusing on vulnerable residents who have few other transportation options. WVMT also contributes to this vision by providing transportation that is efficient and convenient. At this time, the process for booking an out-of-town medical ride is straight forward and easy, with residents calling Woodburn Transit to schedule medical trips. Service is door-to-door. The rides are also affordable.

18. Please provide specific page(s) of the Local Plan(s) where project or funding need is listed.
page 11

19. What is the minimum grant amount that will still allow your project to proceed?
\$128,700.00

20. Select the fund source(s) for which you would like to compete and that you believe your project is eligible to receive. Check all that apply.

STIF Discretionary

STIF Intercommunity Discretionary

21. Rank the fund sources in the order of preference with 1 being first choice and 3 being the last choice.

STIF Discretionary

No Preference

STIF Intercommunity Discretionary

No Preference

FTA Section 5311(f) Intercity

No Preference

22. Why is this an important project? What are the consequences of this project not receiving funding?

It is critical that Woodburn residents are able to access medical services, particularly during the pandemic. WVMT program passengers regularly express satisfaction and relief that the City of Woodburn provides them with a means to receive their dialysis treatment, dental care, eye exams, mental health counseling, and other medical services. WVMT program revenue, however, has not kept pace with costs (FY20 internal assessment). The Woodburn City Council understands the program provides crucial support to less mobile and vulnerable community members and is considering ways to keep the program running at full capacity. However, it is a priority to keep passenger fees low at this time in consideration of pandemic-related job losses. External funding is vital to meet the need for medical transportation. A potential consequence of not receiving project funding will be to scale back on services, reduce staffing, and accommodate fewer ride requests.

23. Will this project involve breaking ground or any other activity that might require environmental review per federal requirements?

No

Oregon Transportation Commission Investment

Priorities

Equity and Public Transportation Service to Low-Income Households

24. Describe how this project would support and improve access for vulnerable populations and/or historically marginalized communities.

This project supports access for many vulnerable populations. There are numerous assisted living facilities and senior housing areas in Woodburn, where the 65+ demographic is about 17% of the population. Elderly residents who no longer drive depend on the WVMT service. Woodburn is also home to over 1,300 veterans (2018, ACS), and many disabled veterans rely on this medical transportation service to take them from Woodburn to VA hospitals and clinics in Portland, Salem, and West Linn. In the past two years, WVMT provided rides for 242 doctors' visits to VA medical centers. Additionally, approximately 17% of WVMT passengers are non-ambulatory, and program mini-vans with lift gates move passengers safely in and out of the vehicles.

Coordination of Public Transportation Services

25. Describe how this project would improve the passenger experience, benefit multiple transit providers, or involve consolidation, coordination, or resource sharing between agencies, including use of transportation data and technology.

The WVMT project improves the passenger experience by allowing for a wider paratransit experience beyond city limits, as well as access to more medical providers and services. The project also allows residents an affordable, reliable transportation experience. Coordination and resource sharing between the City and other transportation agencies is not a strong component of this project.

Environmental and Public Health

26. Describe how this project would go beyond providing an alternative to personal car use to reduce greenhouse gas emissions, reduce pollution, and/or support positive health outcomes.

The WVMT project will make every effort to combine rides when passengers go to the same cities for medical appointments, reducing pollution and greenhouse gas emissions.

Safety, Security, and Community Livability

27. Describe how the project would increase use and participation in active transportation, including public transportation.

The WVMT project is not focused on active transportation.

28. Describe how the project would support and improve safety of passengers in transit vehicles and safety of other roadway users.

Woodburn Transit works to implement the City's vision of safe and reliable public transportation service. The WVMT program helps provide seniors and disabled persons with options to get to and from medical appointments when safely driving themselves is not possible. Many riders have limited eyesight and mobility limitations. WVMT also supports the safety of other drivers on the roads. WVMT staff go through extensive drivers safety training and are trained to drive in a variety of weather conditions. They are also certified in CPR and First Aid.

Statewide Transit Network Connections

29. Describe how this project would support and improve the utility and connectivity of the

Statewide Transit Network and/or create a foundation for future Statewide Transit Network improvements.

This project makes a unique contribution to the Statewide Transit Network, fulfilling a need for a vulnerable population where limited transportation options exist. It serves as one of the few local, semi-rural programs that focus on medical care and paratransit transportation outside of city limits.

Funding and Strategic Investment

30. Describe how the project match requirements will be met or exceeded. Describe why investment in this project makes sense from both the perspective of current need and long term Oregon transit needs.

Matching funds for the WVMT project will come from City general funds allocated annually to Woodburn Transit. Federal 5311 & 5310 PM funds for volunteer mileage and vehicle maintenance reimbursements received by the City during the FY21-23 biennium may also contribute to this match. Investing in this paratransit program is vital because of the community's struggle, like most communities across the United States, with the current public health emergency and economic insecurity.

31. If this project will last beyond the 2021-23 biennium, describe the plan for ongoing funding including match. If not applicable, type N/A.

Prior to the end of 2023, the City of Woodburn will consider new program funding options, including partnering with an outside agency that can provide medical transportation for passengers with Medicaid insurance. This could allow the City to focus limited resources on non-Medicaid passengers. The City also recently initiated discussions with a local social services non-profit regarding their ability to support the operation of the program in the future, and those discussions will continue. The City will also consider transitioning from a donation-based model to a fare-based model after the pandemic, charging fares based on the location of medical appointments. The City will focus more efforts on volunteer driver recruitment, keeping up with ride requests while reducing labor expenditures. It is likely this important service will be able to continue after FY23 with some changes WVMT's financial structure.

32. Does this project depend on other funding sources including other discretionary grants whose outcomes are uncertain? If yes, please list those fund sources. If not applicable, type N/A.

The median annual household income in Woodburn is \$54,000 and 55% of residents have low-to-moderate incomes. Since the pandemic began, the City of Woodburn implemented a fareless ride policy to acknowledge residents' economic hardships and to encourage physical distancing between passengers and drivers. In October, the City of Woodburn applied for CARES needs-based funds to waive passenger fares and provide lost fare revenue to the City. This application is currently under review. If awarded, the CARES funds will overlap with this grant for six months (July 1 - December 31, 2021). While WVMT services will not depend on CARES funding, receiving these funds during the pandemic and waiving WVMT donations or fees will help lessen residents' economic burden and potentially keep ridership rates steady.

33. Capital Asset Purchases

Describe proposed capital purchases. If no capital assets are included in your application, type N/A.

N/A

Project Details

Task Category

Operating

Operating

Total Task Cost (Grant Amount + Match Amount)
\$143,000.00

Are matching funds available if the project is awarded?
Yes

What percent of funds will be used for demand response transportation?
100%

Project Task and Match Amounts

20% Match Rate Calculations

Grant Amount - STIF Discretionary/STIF Intercommunity (80% State Share)
\$114,400.00

Match Amount - STIF Discretionary/STIF Intercommunity (20% Local Share)
\$28,600.00

10% Match Rate Calculations (For Qualified Applicants)

Grant Amount - STIF Discretionary/STIF Intercommunity (90% State Share)
\$128,700.00

Match Amount - STIF Discretionary/STIF Intercommunity (10% Local Share)
\$14,300.00

Application Totals

Match Sources

Match Sources	Amount
Local	\$14,300.00

Note on Application Totals: If applying for 5311(f) Operating, a 50% match rate is applied to identified Operating costs. However, the application form automatically applies a 20% match rate to the full Project Cost, including Operating costs. Therefore, Section 5311(f) applicants should ensure the accuracy of the Total Task Cost for each Task Category, as the 20% match rate will only apply to non-Operating costs in a 5311(f) grant award. The form is unable to calculate an accurate application total using two different match rates.

20% Match Rate Calculations

Grant Amount
\$114,400.00

Match Amount
\$28,600.00

10% Match Rate Calculations (For Qualified Applicants)

Grant Amount

Match Amount

\$128,700.00

\$14,300.00

Oregon Department of Transportation



STIF Discretionary and Statewide Transit Network Application: FY 2021-23

Applicant Information

Agency Legal Name

Benton County

Agency Legal Address

City of Corvallis Public Works, PO Box 1083, Corvallis, Oregon 97330

Application Contact Name

Brad Dillingham

Application Contact Title

Transportation Coordinator

Application Contact Email Address

brad.dillingham@corvallisoregon.gov

Application Contact Phone Number

(541) 754-1748

Name of Person Signing Agreement

Gary Stockhoff

Title of Person Signing Agreement

Director of Public Works

Email Address of Person Signing Agreement

gary.stockhoff@co.benton.or.us

Phone Number of Person Signing Agreement

(541) 766-6010

Agency Information

1. Transit Agency Type

County

1.A Does the agency have any existing grant agreements with ODOT?

Yes

2. What is the main type of service that will be supported by this award?

Fixed Route

3. Would this award support ongoing operations of an existing service?

No

Risk Assessment Information

4. Did your agency have any turnover of management or financial staff in the last two years?

No

5. Does your agency have an accounting system that allows you to completely and accurately track the receipt and disbursement of funds related to the award?

Yes

6. What type of accounting system does your agency use?

Automated

7. Does your agency have a system in place that will account for 100 percent of each employee's time?

Yes

8. Did your staff members attend required training and meetings during the previous biennium?

Yes

9. Was your agency audited by the federal government in the past two years?

No

10. Did your agency stay on budget in the past two years?

Yes

Agency Qualifications

11. Describe how your agency has the legal, managerial and operational capacity to perform and report on project progress within the scope, schedule and budget of the anticipated grant agreement. (Description of operational capacity should apply specifically for the workload of projects in this application.)

Benton County is an administrative department of the state with full legal authority to conduct its affairs. Benton County has a Transportation Coordinator who relies on a vendor to provide all aspects of transit operations and maintenance. The same vendor would operate the proposed Hwy 99W pilot. Operating expenses include dispatch, demand response services, local and commuter route services throughout Benton County and maintenance for dozens of vehicles.

Benton Area Transit operates an Intercity route operating seven days a week between Newport and Albany in partnership with Lincoln County; Local fixed routes provide connections between Corvallis and Adair Village and Albany. Demand response service provides shared rides without a set schedule and includes ADA paratransit door to door service and general public Dial-A-Ride curb to curb service throughout Benton County.

12. Certification of Compliance

By checking this box, the applicant certifies that if they are awarded funding, they will meet and ensure compliance for the term of the agreement with applicable federal, state and local laws and regulations including, and not limited to, those pertaining to passenger transportation, civil rights, labor, insurance, safety and health.

Yes

13. Do you plan to use a Sub-Recipient or contractor to implement the grant supported activity?

Yes

13.A If Yes, please list the Sub-Recipient(s) and describe how the applicant will provide sufficient Sub-Recipient/contractor oversight to ensure eligibility is maintained while receiving STIF Discretionary or Statewide Transit Network moneys.

The contracted service provider for the proposed Hwy 99W pilot transit service would be Dial-a-Bus. They are the same contracted service provider that Benton Area Transit uses to cover its entire service area. The relationship between Dial-a-Bus and Benton County has been generally constructive, which has assisted with contractor oversight. Contractor oversight has also been maintained by Benton Area Transit by renegotiating its contract and participating in periodic reviews by ODOT PTD.

14. If you seek the 10 percent match reduction, does the project meet one or more of the four factors identified in OAR 732-044-0005(4)(a)? Select each factor that you believe is exemplified by the proposed project.

Predominantly serves or provides access to and from rural communities

Serves an area outside of the applicant's geographic jurisdiction

Fills a significant gap in the Statewide Transit Network

Provides statewide benefits to multiple Public Transportation Service Providers outside of the area where the proposed project will be located

15. Will federal funds be used to complete this project?

No

Project Information

16.A Project Title

Hwy 99W Transit Corridor Pilot

16.B Describe the project to be funded. Clearly describe what the requested fund award would be used to accomplish, detailing the specific tasks and deliverables. Where relevant, identify the origin and destination of the proposed service as well as each municipality visited along the route. Please see page 22 of program guidance for additional guidance on writing a project description.

This project proposes to meet a need for public transit along the 99W corridor from McMinnville to Junction City that has been assessed as part of an ongoing Hwy 99W Transit Corridor Study managed by Oregon Cascades West Council of Governments with funding from the STIF Discretionary program. The consensus among participants in the the study, which includes representatives from Lane Transit District, Lane Council of Governments, Benton Area Transit, Salem Area Mass Transit and Yamhill County, thought that sufficient demand for transit exists on the corridor to launch pilot transit service. Two of the participants in the study, Yamhill County and Benton County, have agreed to a partnership to operate the pilot transit service.

For background, the City of Monroe is completely unserved by transit, and many areas along Hwy 99W are only accessible by private automobile. An overview map is included in Attachment 2, and additional information on the project scope and schedule are included in Attachment 3.

Currently, Lane Transit District operates service from Eugene to Junction City; Benton County serves the segment between Corvallis and Adair Village; Cherriots serves from Monmouth to Salem; and, Yamhill County Transit serves from Salem to McMinnville, and north to the Tigard Transit Center.

The project has been broken into three phases; Demand Analysis, Implementation Plan, and Operations. The Demand Analysis phase is nearly complete, with transit provider interviews, stakeholder surveys of existing and potential riders, and input from connecting transit service providers informing the decision to proceed with the next phases of the project. The second phase will refine route details, determine vehicle

type, and create a brand and marketing strategy. The final phase will involve operating the service for up to two years from the initial start date.

It's estimated that vehicle acquisition would take 9-12 months. This would allow the service to start in the summer 2022 while Yamhill County and Benton County assess and implement a sustainable funding strategy, which likely would initially have to rely on STIF Formula funding from the respective Qualified Entities. Traditional metrics for evaluating transit productivity include passengers per revenue hour of operation, passenger boardings, and route on-time percentage. However, this project is expected to be more of an accessibility (to transit) project and may have to be evaluated using other metrics. The project phases have been further outlined in Attachment 3.

Yamhill County Transit and Benton Area Transit are well positioned to implement and manage the proposed transit service on Hwy 99W. Benton County extends south to the City of Monroe, which is approximately seven miles from Junction City and McMinnville is where Yamhill County Transit is located. The geographic location of the project partners will allow them to either split the service into northern and southern segments, or run the entire 70 plus mile route length while keeping dead heads to a minimum via scheduling.

The initial pilot transit service will involve four round trips per day (two by each partner), five days a week. The project partners would each have to acquire a primary and a backup bus (four total) to implement the pilot transit service. The scope of the proposal covers almost all of the rural communities on Hwy 99W, including the communities of Monroe, Corvallis, and Adair Village, Monmouth, Rickreall and Amity. The proposed pilot transit service would connect with Lane Transit District in Junction City, with four transit services in Corvallis, with Cherriots in Monmouth, with Tillamook County Transportation Service District in Rickreall and with Yamhill County Transit in Amity and McMinnville.

17. What Local Plans include this project or elements of the project? Be specific in the citation of the Local Plans.

This project is either directly supported or mentioned in five local, regional or state plans including:

Oregon Public Transportation Plan, Salem-Keizer Long Range Regional Transit Plan, Central Willamette Valley Regional Coordinated Care Plan, and Benton County Transportation System Plan.

While identification of the project in local plans is not required if it fills a gap in the STN, the integration of it in local plans further emphasizes the need for pilot transit service along Hwy 99W.

18. Please provide specific page(s) of the Local Plan(s) where project or funding need is listed.

A summary of each plan, the location, and appropriate page numbers is included in Attachment 4. Furthermore, the project fills a gap in the Statewide Transit Network, as identified in Attachment 2, and Attachment 5.

19. What is the minimum grant amount that will still allow your project to proceed?

\$304,520.00

20. Select the fund source(s) for which you would like to compete and that you believe your project is eligible to receive. Check all that apply.

STIF Discretionary

STIF Intercommunity Discretionary

21. Rank the fund sources in the order of preference with 1 being first choice and 3 being the last choice.

STIF Discretionary

STIF Intercommunity Discretionary

1

FTA Section 5311(f) Intercity

No Preference

22. Why is this an important project? What are the consequences of this project not receiving funding?

If the project is not funded, small cities along Highway 99W, such as Monroe, Adair Village, Monmouth, Rickreall and Amity, will continue to be unserved or underserved by transit. This will likely require travelers to use the only transportation option available to them, automobiles.

The need for the proposed pilot transit service has been validated by a transit corridor study in which over half of ~500 survey respondents strongly supported it and by enthusiastic support from staff participants from transit partners like LTD, Cherriots and Link Lane in a recent Hwy 99W transit corridor study Technical Advisory Committee meeting.

The Hwy 99W transit service pilot will not only provide a valuable transportation option to low income households in communities like Junction City, Monroe, Monmouth, Rickreall and Amity, it will serve as an important north/south connection for existing transit services operating between the Oregon Coast and the Willamette Valley. Pilot transit service along Hwy 99W would also connect three university campuses (Linfield University in McMinnville, Western Oregon University in Monmouth and Oregon State University in Corvallis), which would allow students at each university to visit friends or travel home by bus. The momentum gained by conducting a transit corridor study for Hwy 99W would be lost if a transit service pilot is delayed.

The project can scaled down by \$175,000 by not funding one of the requested buses.

23. Will this project involve breaking ground or any other activity that might require environmental review per federal requirements?

No

Oregon Transportation Commission Investment Priorities

Equity and Public Transportation Service to Low-Income Households

24. Describe how this project would support and improve access for vulnerable populations and/or historically marginalized communities.

Attachment 6 is a map of the communities along the 99W Corridor this project would connect with larger metropolitan areas. All cities have a higher or nearly equal percentage of low income residents compared with the State of Oregon. Additionally, Monroe, which is currently unserved by any transit, has over twice the state average for people with disabilities. Collectively, the small communities along Hwy 99W represent 75,000 additional riders that would have access to transit and amenities located in the three largest metropolitan areas in the state.

Coordination of Public Transportation Services

25. Describe how this project would improve the passenger experience, benefit multiple transit

providers, or involve consolidation, coordination, or resource sharing between agencies, including use of transportation data and technology.

The proposed Hwy 99W transit service pilot touches four Oregon counties, where seven public transit providers currently operate. The Hwy 99W corridor study is a regional collaboration. Indeed, the minutes of a recent Hwy 99W transit corridor study Technical Advisory Committee meeting demonstrates widespread support among western Willamette Valley transit providers. That meeting also yielded the partnership between Benton Area Transit and Yamhill County Transit, which is an important collaboration for future contributions to the STN.

Benton County, which has the project identified in their transportation system plan, currently operates service between Corvallis and Adair Village. Yamhill County currently operated service between McMinnville and Amity. The project partners plan to coordinate the four buses used for the proposed route, with each operating half of the service through independent purchased service contracts.

The proposed pilot transit service along Hwy 99W will serve as an important north/south connection for existing transit services operating between the Oregon Coast and the Willamette Valley. The new north/south connection would alleviate the need to travel all the way to the I-5 corridor to go north or south by bus through the Willamette Valley. This could significantly improve the rider experience for people wishing to transfer from connecting transit services coming from the Oregon Coast, as it eliminates out of direction travel. The proposed pilot would also connect three university campuses (Linfield University in McMinnville, Western Oregon University in Monmouth and Oregon State University in Corvallis), which would allow students at each university to visit friends or travel home by bus.

Environmental and Public Health

26. Describe how this project would go beyond providing an alternative to personal car use to reduce greenhouse gas emissions, reduce pollution, and/or support positive health outcomes.

Rural communities along Highway 99W, such as Monroe, Adair Village, Monmouth, Rickreall and Amity, have limited or no access to public transit, which requires most travelers along the corridor to use the only transportation option available to them, automobiles.

Through the expansion of transit service to communities previously unserved or underserved, the proposed transit service pilot will provide a method of travel other than single passenger vehicles to more of the Oregon population. By improving transit access, positive health outcomes are supported by offering active transportation options.

Safety, Security, and Community Livability

27. Describe how the project would increase use and participation in active transportation, including public transportation.

As mentioned earlier, this project would indirectly connect nearly 75,000 people to the three largest metropolitan areas in the state. Providing access to these residents would encourage the use of public transportation for commuting, trips for services and shopping, medical trips, and recreational trips.

The proposed pilot transit service along Hwy 99W will also serve as an important north/south connection for existing transit services operating between the Oregon Coast and the Willamette Valley. The new north/south connection would alleviate the need to travel all the way to the I-5 corridor to travel north or south by bus through the Willamette Valley. This will greatly improve the rider experience for riders wishing to transfer from connecting transit services coming from the Oregon Coast, as it eliminates out of direction travel. Furthermore, the proposed pilot would also connect three university campuses (Linfield University in McMinnville, Western Oregon University in Monmouth and Oregon State University in Corvallis), which would allow students at each university to visit friends or travel home by bus.

Attachment 7 demonstrates the critical regional link this service would provide.

28. Describe how the project would support and improve safety of passengers in transit vehicles and safety of other roadway users.

The 99W corridor, outside of city centers, is considered safe for public transportation and the addition of a route through the rural areas provides for risk reduction across all travel modes. While this route serves some of the larger cities along the 99W corridor, it covers a primarily rural geography. Public transportation options are generally limited in rural communities, leaving people to take other modes of transportation for work, recreation, and personal use.

By providing pilot transit service that serves job centers, public and private recreation options along Hwy 99W, and shopping and medical providers, passengers will be able to access their needs without opting for a single-occupancy vehicle trip, or biking or walking in a potentially unsafe environment (45 mph +, with sporadic sidewalks and bike lanes).

Other roadway users may benefit from this service by increased ridership lessening traffic and limiting the number of other users on the road and thereby reducing possible crashes.

Statewide Transit Network Connections

29. Describe how this project would support and improve the utility and connectivity of the Statewide Transit Network and/or create a foundation for future Statewide Transit Network improvements.

The proposed Hwy 99W transit service pilot touches four Oregon counties, where seven public transit providers currently operate. The Hwy 99W corridor study is a regional collaboration. Indeed, the minutes of a recent Hwy 99W transit corridor study Technical Advisory Committee meeting demonstrates widespread support among western Willamette Valley transit providers. That meeting also yielded the partnership between Benton Area Transit and Yamhill County Transit, which is an important collaboration for future contributions to the STN.

Benton County, which has the project identified in their transportation system plan, currently operates service between Corvallis and Adair Village. Yamhill County currently operates service between McMinnville and Amity. The project partners plan to coordinate the four buses used for the proposed route, with each operating half of the service through independent purchased service contracts.

The proposed pilot transit service along Hwy 99W will serve as an important north/south connection for existing transit services operating between the Oregon Coast and the Willamette Valley. The new north/south connection would alleviate the need to travel all the way to the I-5 corridor to go north or south by bus through the Willamette Valley. This could significantly improve the rider experience for people wishing to transfer from connecting transit services coming from the Oregon Coast, as it eliminates out of direction travel. These services include the Coast to Valley Express, with a potential connection in Corvallis, Tillamook County Transportation Service District's route between Grande Ronde and Salem, with a potential connection in Rickreall, and Cherriots Regional routes serving Polk County, with a potential connection in Monmouth.

The proposed pilot would also connect three university campuses (Linfield University in McMinnville, Western Oregon University in Monmouth and Oregon State University in Corvallis), which would allow students at each university to visit friends or travel home by bus.

Funding and Strategic Investment

30. Describe how the project match requirements will be met or exceeded. Describe why investment in this project makes sense from both the perspective of current need and long term

Oregon transit needs.

The anticipated match requirement for the Hwy 99W transit service pilot will be satisfied through Yamhill County's and Benton County's STIF Formula funds (the project is identified in the Yamhill County TDP and the Benton County TSP), since the pilot will predominantly serve rural areas; the match would therefore be 10%. If the STIF Formula funding requests are unsuccessful, partner transit agencies in the region will be approached to share the cost of match. Long term funding strategies will be explored by the project partners in collaboration with other transit providers, and state and federal agencies.

31. If this project will last beyond the 2021-23 biennium, describe the plan for ongoing funding including match. If not applicable, type N/A.

Long term funding for the Hwy 99W transit service pilot, should it prove useful, will come from Yamhill County's and Benton County's STIF Formula funds. The project partners have agreed to include transit service along Hwy 99W in their respective STIF Plans for the FY 2024 - FY 2025 biennium should the pilot prove that transit service along the corridor can be successful. Matching funds are not required for projects listed in a local QE's STIF Plan.

32. Does this project depend on other funding sources including other discretionary grants whose outcomes are uncertain? If yes, please list those fund sources. If not applicable, type N/A.

The anticipated 10% match for the Hwy 99W transit service pilot will come from Yamhill County's and Benton County's STIF Formula funds for the FY 2022 - FY 2023 biennium.

33. Capital Asset Purchases

Describe proposed capital purchases. If no capital assets are included in your application, type N/A.

If the project is fully funded, four Category C buses (two each for Yamhill County Transit and Benton Area Transit) will be required to serve anticipated demand along the 99W corridor. A procurement will be necessary to acquire the buses, so exact numbers aren't currently available on the cost of the buses. However, Category C buses typically cost about \$175,000 each and \$700,000 has therefore been budgeted for bus acquisitions.

Also, two sets of signs and shelters for stops in Adair Village and Monroe are included in this application.

Project Details

Task Category

Vehicle Purchase
Signs/Shelters Purchase
Planning
Project Administration
Operating
Preventive Maintenance

Vehicle Purchase

Is this a vehicle expansion, vehicle replacement, or both?

Vehicle Expansion

Vehicle Expansion

Will you use the Oregon state price agreement contract?

Yes

Will this grant award support purchase of a used vehicle?

No

Vehicles to be purchased

Vehicle ALI	Make/ Model	Quantity	Cost Each	Total	# of seats / # ADA station s	# of seats with ADA deploy ed	Fuel System	Est. Order Date	Est. Delivery Date
11.12.04 Bus < 30 FT	Ford	2	\$175,000.00	\$350,000.00	2,002	22	Diesel (D)	7/18/2021	5/16/2022

Total:
2

Grand Total:
\$350,000.00

Total Project Cost (Grant Amount + Match Amount)
\$350,000.00

Are matching funds available if the project is awarded?
Yes

Percent of funds to be used for fixed route transportation
100%

Project Task and Match Amounts

20% Match Rate Calculations

Grant Amount - STIF Discretionary/STIF Intercommunity/5311f (80% State/Fed Share)
\$280,000.00

Match Amount - STIF Discretionary/STIF Intercommunity/5311f (20% Local Share)
\$70,000.00

10% Match Rate Calculations (For Qualified Applicants)

Grant Amount - STIF Discretionary/STIF Intercommunity (90% State Share)
\$315,000.00

Match Amount - STIF Discretionary/STIF Intercommunity (10% Local Share)
\$35,000.00

Signs/Shelters Purchase

Signs/Shelters Request

Item Description	Quantity	Cost Each (Project)	Total Cost	Est. Order Date	Est. Delivery Date
------------------	----------	---------------------	------------	-----------------	--------------------

		Cost)			
Shelters with signs	4	\$25,000.00	100,000.00	9/15/2021	3/15/2021

Total: 4

**Grand
Total:
100,000.00**

Total Task Cost (Grant Amount + Match Amount)
\$100,000.00

Are matching funds available if the project is awarded?
Yes

Percent of funds used for fixed route transportation
100%

Project Task and Match Amounts

20% Match Rate Calculations

Grant Amount - STIF Discretionary/STIF Intercommunity/5311f (80% State/Fed Share)
\$80,000.00

Match Amount - STIF Discretionary/STIF Intercommunity/5311f (20% Local Share)
\$20,000.00

10% Match Rate Calculations (For Qualified Applicants)

Grant Amount - STIF Discretionary/STIF Intercommunity (90% State Share)
\$90,000.00

Match Amount - STIF Discretionary/STIF Intercommunity (10% Local Share)
\$10,000.00

Planning

Total Task Cost (Grant Amount + Match Amount)
\$20,000.00

Are matching funds available if the project is awarded?
Yes

Percent of funds used for fixed route transportation
100%

Project Task and Match Amounts

20% Match Rate Calculations

Grant Amount - STIF Discretionary/STIF Intercommunity/5311f (80% State/Fed Share)
\$16,000.00

Match Amount - STIF Discretionary/STIF Intercommunity/5311f (20% Local Share)
\$4,000.00

10% Match Rate Calculations (For Qualified Applicants)

Grant Amount - STIF Discretionary/STIF Intercommunity (90% State Share)
\$18,000.00

Match Amount - STIF Discretionary/STIF Intercommunity (10% Local Share)
\$2,000.00

Project Administration

Total Task Cost (Grant Amount + Match Amount)
\$40,000.00

Are matching funds if the project is awarded?
Yes

Percent of funds used for fixed route transportation
100%

Project Task and Match Amounts

20% Match Rate Calculations

Grant Amount - STIF Discretionary/STIF Intercommunity/5311f (80% State/Fed Share)
\$32,000.00

Match Amount - STIF Discretionary/STIF Intercommunity/5311f (20% Local Share)
\$8,000.00

10% Match Rate Calculations (For Qualified Applicants)

Grant Amount - STIF Discretionary/STIF Intercommunity (90% State Share)
\$36,000.00

Match Amount - STIF Discretionary/STIF Intercommunity (10% Local Share)
\$4,000.00

Operating

Total Task Cost (Grant Amount + Match Amount)
\$145,600.00

Are matching funds available if the project is awarded?
Yes

Percent of funds used for fixed route transportation
100%

Project Task and Match Amounts

20% Match Rate Calculations

Grant Amount - STIF Discretionary/STIF Intercommunity (80% State Share)

Match Amount - STIF Discretionary/STIF Intercommunity (20% Local Share)

\$116,480.00

\$29,120.00

10% Match Rate Calculations (For Qualified Applicants)

Grant Amount - STIF Discretionary/STIF Intercommunity (90% State Share)
\$131,040.00

Match Amount - STIF Discretionary/STIF Intercommunity (10% Local Share)
\$14,560.00

Preventive Maintenance

Total Task Cost (Grant Amount + Match Amount)
\$12,000.00

Are matching funds available if the project is awarded?
Yes

Percent of funds used for fixed route transportation
100%

Project Task and Match Amounts

20% Match Rate Calculations

Grant Amount - STIF Discretionary/STIF Intercommunity/5311f (80% State/Fed Share)
\$9,600.00

Match Amount - STIF Discretionary/STIF Intercommunity/5311f (20% Local Share)
\$2,400.00

10% Match Rate Calculations (For Qualified Applicants)

Grant Amount - STIF Discretionary/STIF Intercommunity (90% State Share)
\$10,800.00

Match Amount - STIF Discretionary/STIF Intercommunity (10% Local Share)
\$1,200.00

Application Totals

Match Sources

Match Sources	Amount
State	\$66,760.00

Note on Application Totals: If applying for 5311(f) Operating, a 50% match rate is applied to identified Operating costs. However, the application form automatically applies a 20% match rate to the full Project Cost, including Operating costs. Therefore, Section 5311(f) applicants should ensure the accuracy of the Total Task Cost for each Task Category, as the 20% match rate will only apply to non-Operating costs in a 5311(f) grant award. The form is unable to calculate an accurate application total using two different match rates.

20% Match Rate Calculations

Grant Amount
\$534,080.00

Match Amount
\$133,520.00

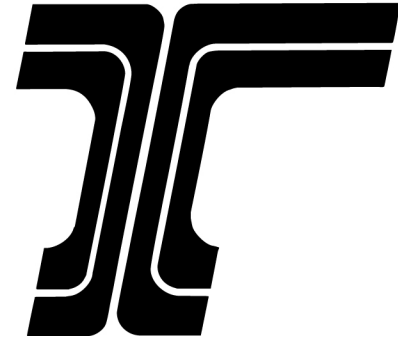
10% Match Rate Calculations (For Qualified Applicants)

Grant Amount
\$600,840.00

Match Amount
\$66,760.00

Document Upload (Optional)
99W Corridor Attachements.pdf

Oregon Department of Transportation



STIF Discretionary and Statewide Transit Network Application: FY 2021-23

Applicant Information

Agency Legal Name

Tillamook County Transportation District

Agency Legal Address

3600 Third Street, Suite A, Tillamook, Oregon 97141

Application Contact Name

Douglas Pilant

Application Contact Title

General Manager

Application Contact Email Address

dpilant@tillamookbus.com

Application Contact Phone Number

(503) 842-3115

Name of Person Signing Agreement

Douglas Pilant

Title of Person Signing Agreement

General Manager

Email Address of Person Signing Agreement

dpilant@tillamookbus.com

Phone Number of Person Signing Agreement

503-842-3115

Agency Information

1. Transit Agency Type

Transportation District

1.A Does the agency have any existing grant agreements with ODOT?

Yes

2. What is the main type of service that will be supported by this award?

Fixed Route

3. Would this award support ongoing operations of an existing service?

Yes

3.A Operations costs of

previous quarter

\$73,157.00

3.B Brief history of current project/service. What, if any, elements of the proposed project differ from existing efforts and services?

ODOT Public Transit Division sponsored a study called, "The Salmon Highway Transportation Options Plan" in 2011 to identify and recommended new transportation options and enhanced transit coordination and connections on the Highway 18/22 corridor between Lincoln City and Salem.

The Plan's transit strategy included establishing intercity transit services thru a partnership between a transportation provider and the Confederated Tribes of Grand Ronde and the Siletz Indians. In 2013, Tillamook County Transportation District (TCTD) agreed to become the projects provider to fulfill the District's historical desire to provide Tillamook County residents a public transportation service to/from Salem and to implement a new NW Connector service between the coast and the Willamette Valley in Salem.

Service began operating the Route 60X - Coastal Connector service in March 2014. Initially the service provided 3-round trips (Monday thru Friday) between Lincoln City and Grand Ronde where riders could conveniently transfer onto the Cherriots Regional 2X service to Salem. On weekends, Route 60X operated 3-round trips between Lincoln City and Salem. In 2016 Salem-Keizer Transit announced they would discontinue operating the Regional 2X to Grand Ronde. TCTD collaborated with the Confederated Tribes of Grand Ronde (CTGR), which resulted in expanding the Route 60X to operate 3 daily roundtrips between Lincoln City and Salem. This new service enhanced service began operations in January 2017. In 2018 TCTD was able to adjust the schedule so that passengers could make convenient connections to Lincoln County Transit services to Newport and TCTD connections to Tillamook.

Over the past 3-years the District has successfully negotiated ticketing interline agreements with both Amtrak and Greyhound that allow passengers the ability to book trips to/from Tillamook and Salem. TCTD has also developed route schedules that provide riders convenient transfers to both Greyhound and Amtrak services in Salem.

Risk Assessment Information

4. Did your agency have any turnover of management or financial staff in the last two years?

No

5. Does your agency have an accounting system that allows you to completely and accurately track the receipt and disbursement of funds related to the award?

Yes

6. What type of accounting system does your agency use?

Combined

7. Does your agency have a system in place that will account for 100 percent of each employee's time?

Yes

8. Did your staff members attend required training and meetings during the previous biennium?

Yes

9. Was your agency audited by the federal government in the past two years?

No

10. Did your agency stay on budget in the past two years?

Yes

Agency Qualifications

11. Describe how your agency has the legal, managerial and operational capacity to perform and report on project progress within the scope, schedule and budget of the anticipated grant agreement. (Description of operational capacity should apply specifically for the workload of projects in this application.)

Tillamook County Transportation District (TCTD) was established as an ORS 267.510 transportation district by the Tillamook County Board of Commissioners in July 1997. The District is governed by a 7-member Board of Directors who are elected at large. The Board has legal authority to adopt plans, policies, annual budgets, impose taxes and execute contracts and intergovernmental agreements.

TCTD's administrative and operations activities are overseen by the general manager (Doug Pilant) who has 31-years public transportation planning and operations management experience. The administrative staff consists of a finance supervisor, an administrative assistant/board clerk. The District's public transportation services and vehicle maintenance are overseen by the operations superintendent (Brent Olson) who has 19-years transit operations experience and he is assisted by an operations coordinator, dispatchers, and service tech.

An organizational chart has been uploaded as Attachment A.

12. Certification of Compliance

By checking this box, the applicant certifies that if they are awarded funding, they will meet and ensure compliance for the term of the agreement with applicable federal, state and local laws and regulations including, and not limited to, those pertaining to passenger transportation, civil rights, labor, insurance, safety and health.

Yes

13. Do you plan to use a Sub-Recipient or contractor to implement the grant supported activity?

No

14. If you seek the 10 percent match reduction, does the project meet one or more of the four factors identified in OAR 732-044-0005(4)(a)? Select each factor that you believe is exemplified by the proposed project.

Not applying for 10% match reduction

15. Will federal funds be used to complete this project?

Yes

Project Information

16.A Project Title

TCTD Route 60X: Coastal Connector - Lincoln City-Grand Ronde-Salem

16.B Describe the project to be funded. Clearly describe what the requested fund award would be used to accomplish, detailing the specific tasks and deliverables. Where relevant, identify the origin and destination of the proposed service as well as each municipality visited along the route. Please see page 22 of program guidance for additional guidance on writing a project description.

The Coastal Connector funding request is to operate 3 daily roundtrips 7-days per week between Lincoln City, Grand Ronde, and Salem. The Coastal Connector's schedule includes stops at Rose Lodge, Grand

Ronde Community Center, Spirit Mountain, Salem Amtrak/Greyhound Station and the Downtown Salem Transit Mall. The Route 60X will provide approximately 6,600 revenue hours and travel 226,000 revenue miles throughout the FY 2021-23 Biennium and will be closed on the Thanksgiving, Christmas and New Year's holidays.

This funding request right-sizes the District's fleet by purchasing an expansion bus to increase the Route 60X's dedicated fleet to 3 Category B buses.

17. What Local Plans include this project or elements of the project? Be specific in the citation of the Local Plans.

Salmon River Transportation Options Plan - February 2013

Below are excerpts from Plans adopted by the Tillamook County Transportation District's Board of Directors:

1) "Long Range Transit Development Plan", adopted August 18, 2016

"Implement recommendations from the TCTD Intercity Service Enhancement Plan that can be implemented without significant impacts to TCTD's budget. Some enhancements may have potential funding opportunities that would not impact other TCTD services."

2) "Coordinated Human Services Public Transportation Plan", adopted October 21, 2016

Transportation Service Strategies

"Add additional trip or restructure Portland service to create a wider window for people who need medical diagnostics or procedures."

3) "Intercity Enhancement Plan", adopted October 18, 2018

SERVICE RECOMMENDATIONS

"Route 6 – Coastal Connector - [6G] Extend all three daily trips to Salem to provide interline opportunities with Amtrak and Greyhound throughout the day. Implement the same schedule 7 days per week. Two to three weekday SKT 2X trip could be eliminated due to trips provided by TCTD allowing this to be roughly cost neutral but with funding shifted from SKT to TCTD."

18. Please provide specific page(s) of the Local Plan(s) where project or funding need is listed.

Long Range Transit Development Plan - Page 58; Coordinated Human Service Plan - Page 61; Intercity Enhancement Plan - Page 5

19. What is the minimum grant amount that will still allow your project to proceed?

\$486,500.00

20. Select the fund source(s) for which you would like to compete and that you believe your project is eligible to receive. Check all that apply.

FTA Section 5311(f) Intercity

STIF Discretionary

STIF Intercommunity Discretionary

21. Rank the fund sources in the order of preference with 1 being first choice and 3 being the last choice.

STIF Discretionary

3

STIF Intercommunity Discretionary

2

FTA Section 5311(f) Intercity

1

22. Why is this an important project? What are the consequences of this project not receiving funding?

The purpose of the Salmon River Travel Option Plan was to establish partnerships to establish a plan to fund intercity transit services between Lincoln City and Salem. The Coastal Connector service is dependent upon funding from ODOT, and the Confederated Tribes of Grand Ronde and the Siletz Indians. Without this funding request the Route 60X service would not exist.

Below is a list of benefits the Coastal Connector provides the residents of Lincoln City and Salem;

- 1) Transportation to/from employment, shopping, education and medical services
- 2) Connections to interregional transit services at the Salem Amtrak/Greyhound Station
- 3) Convenient connections to Lincoln County Transit, Tillamook County Transit Route 4, Yamhill County Transit, SMART, Cherriots-Salem and Cherriots Regional services
- 4) Supports the region's tourist related industry by providing tourist or out-of-area visitors reliable public transportation to/from the coast and entertainment casinos

Finally, funding is needed to ensure there's adequate resources for preventative maintenance and to purchase an expansion bus to ensure that drivers and passengers experience safe and reliable transportation services. The District's Coastal Connector service relies upon backup buses located in Tillamook that consist of four (4) 10-year old Category B buses with more than 500,000 that have already been replaced. These buses are expensive to maintain and are unreliable. Purchasing an expansion bus is necessary to ensure the District has adequate capacity to provide safe and reliable service.

23. Will this project involve breaking ground or any other activity that might require environmental review per federal requirements?

No

Oregon Transportation Commission Investment Priorities

Equity and Public Transportation Service to Low-Income Households

24. Describe how this project would support and improve access for vulnerable populations and/or historically marginalized communities.

The Coastal Co service provides low income households and vulnerable populations affordable public transportation along the Hwy 18/22 corridor.

Below is a summary of riders who most likely could be categorized as being a member of the vulnerable population being served by this service.

- 83% Would not make the trip unless transit was available
- 39% Annual household income was less than \$15,000
- 56% Senior Citizen or Persons with Disabilities
- 39% Hispanic or tribal members
- 39% No driver license
- 39% No operating vehicle within the household

Trip Purpose

- 44% Social/recreation
- 8% Work
- 3% Medical appointment

Below are a list of Route 60X passenger trip purposes:

- 33% Social/recreation
- 13% Work
- 13% Shopping
- 3% Medical

Route 60X Passenger Profile

- 19% Confederated Tribes of Grand Ronde or Siletz Indians tribal members
- 36% Senior Citizens or Persons with a Disability

When reviewing how this project supports vulnerable population related trips in the onboard customer survey the following themes emerged:

- 1) Passengers use this service to travel to jobs in Lincoln City, Spirit Mountain and Salem. These same passengers travel to their jobs from their homes in Lincoln City, Yamhill County and Salem.
- 2) Several passengers from Grand Ronde rode the bus to grocery shop at Safeway in Lincoln City since there isn't a grocery store in Grand Ronde.
- 3) Lincoln County residents used the bus to get to medical appointments in McMinnville and Salem
- 4) Provides connections to regional and interregional transit services at the Downtown Salem Transit Mall and the Salem Amtrak/Greyhound Station

Remix files have been uploaded for reference as Attachment B.

Coordination of Public Transportation Services

25. Describe how this project would improve the passenger experience, benefit multiple transit providers, or involve consolidation, coordination, or resource sharing between agencies, including use of transportation data and technology.

TCTD collaborates with multiple agencies to coordinate services and share resources. Below is a description of the agencies TCTD has ongoing collaboration and resource sharing:

Salmon River Highway Travel Options Planning Advisory Committee: The advisory committee consists of members from Yamhill County Transit, Cherriots, TCTD, Lincoln County Transit, the Confederated Tribes of the Siletz Indians (CTSI), and the Confederated Tribes of Grand Ronde (CTGR). TCTD continues ongoing collaboration with these partners when developing and enhancing service enhancements.

Northwest Oregon Transit Alliance (NWOTA):

NWOTA is an Intergovernmental Agreement (IGA) between TCTD, Sunset Transportation Empire District (SETD), Lincoln County Transit (LCT), Benton Rural Transit (BRT) and Columbia County Rider CCR). NWOTA activities are overseen by a Coordinating Committee that consists of a managing director of each member agency. The Coordinating Committee meets monthly to coordinate, market and brand the 5 counties collective transit services as a single NW Connector service.

Partnership between TCTD, ODOT, Confederated Tribes of Grand Ronde and the Siletz Indians:

TCTD has been the designated transportation provider and Section 5311(f) grant recipient for the Route 60X service. The Confederated Tribes of Grand Ronde and Siletz Indians provide the projects matching funds.

NWOTA shares a website designed to brand the agencies services as a the NWConnector and provides a trip planner. The website also features Trip Ideas and provides local upcoming event information. Each agency's individual websites are hosted within the website.

TCTD has an interline ticketing agreements with both Amtrak and Greyhound in Salem. TCTD currently has an interline agreement with Greyhound for passengers across North American can book their trips the entire trips to/from Tillamook.

TCTD has an agreement with Cherriots to serve the Downtown Transit Mall. Cherriots has also dedicated a bay at the Downtown Salem Transit Mall.

Environmental and Public Health

26. Describe how this project would go beyond providing an alternative to personal car use to reduce greenhouse gas emissions, reduce pollution, and/or support positive health outcomes.

Prior to the pandemic the Tillamook County Transportation District services were responsible for reducing:

Fossil fuels: 38,572 gallons
Vehicle Miles Traveled: 1,880,445
Greenhouse gas emissions: 268 tons

The Coastal Connector Route 60X represents approximately 18% of the District's fixed route network's passenger miles traveled. The Coastal Connector's environmental contributions were:

Fossil fuels: 6,943 gallons
Vehicle Miles Traveled: 338,480
Greenhouse gas emissions: 48 tons

The Coastliner contributes to positive health outcomes in the following ways:

- 1) Provides approximately 10% of the Coastliner trips are for medical related trip purposes.
- 3) Most bus riders are pedestrians or bicyclists. As a result, they get much needed exercise getting to/from their preferred bus stop locations.
- 4) Adding a 3rd trip to Portland would further increase the quantity of benefits listed above.
- 3) Route 60X supports positive health benefits by providing approximately 3 to 5 percent of riders transportation to/from medical appointments. Additionally, riders walk and bicycle to/from bus stops which promotes physical activity.

4) TCTD is planning to purchase a propane powered replacement bus. Propane fuel will reduce gasoline powered vehicle greenhouse gases by 24% and Carbon Monoxide by 60%. Since this will replace a diesel bus the reduction will be even greater.

Safety, Security, and Community Livability

27. Describe how the project would increase use and participation in active transportation, including public transportation.

The Route 60X increases the usage and participation in active transportation for intercity transit, regional transit, bicycling/walking to/from public transportation.

Each year there are more than 20,000 bicyclists who visit the Oregon Coast. Many of these bicyclists use the Route 60X to travel to/from Salem as well as other out-of-area destinations. NWOTA partners are also active participants in updating the ODOT Oregon Coast Bicycle Plan. Moreover, NWOTA partners recently adopted a NW Connector (system-wide) bicycle policy to ensure there is a uniform policy throughout the NW Oregon region for passengers traveling with bicycles. Next, NWOTA advertises each year on the BikePortland.org website. Finally, the NWOTA partners recently adopted a 5-county Bicycle Policy to ensure that bicyclists will experience a uniform bicycle policy when traveling throughout NW Oregon. A copy of the bicycle policy has been uploaded for review.

For the past several years, Oregon's coastal communities have been focused on how to manage the impact of tourism traffic congestion in their communities. Public transportation and alternative transportation modes such as bicycling have been recognized a pieces of the solution. This year's Tillamook Coast Visitor Guide is dedicating 2 full-size pages to feature the NW Connector service free of charge to NWOTA. These 2 pages will explain to visitors "What is the NW Connector" and "how to plan your trips" using the Connector service. The Guide has a distribution of 80,000 guides throughout NW Oregon.

Finally, NWOTA develops and implements an annual marketing campaign to promote the NW Connector service and build brand awareness.

26. Describe how the project supports and improves safety of passengers in transit vehicles and safety of other roadway users.

The purchase a propane powered replacement bus will improve the safety, cost effectiveness, efficiency and reliability of the Route 60X service by reducing preventative maintenance costs, reducing the fleets average mileage and age. This investment

28. Describe how the project would support and improve safety of passengers in transit vehicles and safety of other roadway users.

Expansion Bus

This project includes purchasing an expansion bus to expand capacity of the Coastal Connector service. Purchasing an expansion bus will ensure service reliability, reduce preventative maintenance costs as well as reduce the fleets average mileage and age.

Preventative Maintenance

The District has implemented a disciplined vehicle preventative maintenance program to ensure vehicles are in safe and operational condition to avoid unnecessary breakdowns and maintain reliable transit services.

Communications

TCTD equips all vehicles with 2-way radios to facilitate communication with the TCTD dispatch center. Vehicles are also equipped with internal/external cameras to record incidents that may occur. All buses are also equipped with "merging into traffic" signage and backup cameras and beepers. Finally, TCTD equips buses with GPS trackers to provide riders real time information on TransitApp. These trackers are also used for the dispatchers to track the locations of vehicles while they are traveling to/from locations. The NW Connector website was recently updated. One of the major updates was simplifying the procedures for NWOTA agency's staff to notify customers of service disruptions. This next year TCTD will be implementing the Ecolane SMS Texting module and will also push service alerts to passengers who signup for the texting alert service.

Trained Drivers

TCTD drivers conduct vehicle pretrip inspections prior to it being placed into service. When a driver discovers a defect they notify the on-duty supervisor who provides further guidance such as making arrangements for maintenance to fix the defect or if that isn't possible reassigning a different bus. All TCTD drivers must participate in annual emergency management refresher training that includes properly chaining-up buses in snowy conditions. TCTD also requires drivers with defensive driving training and annual refresher training. Note: TCTD drivers drove more than 4.5 million miles between December 2015 and January 2020 without a preventative accident.

Statewide Transit Network Connections

29. Describe how this project would support and improve the utility and connectivity of the Statewide Transit Network and/or create a foundation for future Statewide Transit Network improvements.

The Coastal Connector intercity service supports the statewide transit network by providing passengers connections at the following Key Transit Hubs:

- 1) Salem Amtrak/Greyhound Station
- 2) Downtown Salem Transit Mall
- 3) Grand Ronde

The Key Transit Hubs provide Coastal Connector passengers connections to multiple transit providers such as YCTA, SMART, Cherriots-Salem, Cherriots Regional, Amtrak, Greyhound and Point services to regional and interregional connections. The YCTA connector provides riders transportation to McMinnville, Newburg, Hillsboro and Tigard. The Cherriots Regional connections provide riders with transportation to rural communities of Marion and Polk counties while the SMART service provides transportation to Woodburn and Wilsonville.

The Coastal Connector intercity service route connects Salem, Grand Ronde, and Lincoln City. From Lincoln City passengers also have connections north to Tillamook on TCTD Route 4 and south to Newport on Lincoln County Transit.

Funding and Strategic Investment

30. Describe how the project match requirements will be met or exceeded. Describe why investment in this project makes sense from both the perspective of current need and long term Oregon transit needs.

The Coastal Connector is funded through partnership with ODOT, TCTD and the Confederated Tribes of Grand Ronde and the Siletz Indians. Historically, prior to the pandemic fare revenue represents about 15% of the revenue.

31. If this project will last beyond the 2021-23 biennium, describe the plan for ongoing funding including match. If not applicable, type N/A.

N/A

32. Does this project depend on other funding sources including other discretionary grants whose outcomes are uncertain? If yes, please list those fund sources. If not applicable, type N/A.

N/A

33. Capital Asset Purchases

Describe proposed capital purchases. If no capital assets are included in your application, type N/A.

The District is requesting funding to purchase an expansion bus that will be dedicated to the Coastal Connector service. The Coastliner service only has 2 dedicated buses and relies upon backup buses dedicated to "The Wave's" In-county bus services. Sharing backup buses has proven to be unsustainable due to the high number of miles each bus must be driven each year. For example, TCTD uses Category B buses that have a lifecycle of 350,000 miles or 7 years. At this time the minimum annual miles per bus is about 58,000, which results in these buses being driven more than 405,000 in a 7-year timeframe. This is unsustainable and an expansion bus is required to ensure safe and reliable transportation.

Due to the high mileage driven each year the Category B buses used for this service rapidly reach their expected life expectancy within 2 to 3 years. Therefore, this proposal includes an expansion bus for this service. The current fleet consists of 2 buses (300 and 301) that have more than 550,000 and 505,000 respectively. TCTD received a grant to replace the bus originally assigned to this service (Bus #301) and has reassigned Bus #300 to Lincoln City to reduce the number of miles being accumulated on Bus #301. TCTD has completed the procurement process and placed an order for the Bus #301 replacement. However, due to COVID-19 related plant closure and vehicle part supply chain disruptions the delivery date has been postponed to the Spring of 2021. As a result, since both Bus #'s 300 and 301 will accumulate excessive additional miles making the funding request for a backup bus necessary to support this project.

Project Details

Task Category

Vehicle Purchase
Preventive Maintenance
Operating

Vehicle Purchase

Is this a vehicle expansion, vehicle replacement, or both?

Vehicle Expansion

Vehicle Expansion

Will you use the Oregon state price agreement contract?

Yes

Will this grant award support purchase of a used vehicle?

No

Vehicles to be purchased

Vehicle ALI	Make/ Model	Quantity	Cost Each	Total	# of seats / # ADA stations	# of seats with ADA deployed	Fuel System	Est. Order Date	Est. D elivery Date
11.12.02 Bus STD 35 FT	Freightliner	1	\$220,000.00	\$220,000.00	2	24	Diesel (D)	8/31/2021	6/30/2022

Total:
1

**Grand
Total:**
\$220,000.00

Total Project Cost (Grant Amount + Match Amount)
\$220,000.00

Are matching funds available if the project is awarded?
Yes

Percent of funds to be used for fixed route transportation
100%

Project Task and Match Amounts

20% Match Rate Calculations

Grant Amount - STIF Discretionary/STIF Intercommunity/5311f (80% State/Fed Share)
\$176,000.00

Match Amount - STIF Discretionary/STIF Intercommunity/5311f (20% Local Share)
\$44,000.00

Operating

Total Task Cost (Grant Amount + Match Amount)
\$493,000.00

Are matching funds available if the project is awarded?
Yes

Percent of funds used for fixed route transportation
100%

Project Task and Match Amounts

50% Match Rate Calculations

Grant Amount - 5311f (50% Fed Share)
\$246,500.00

Match Amount - 5311f (50% Local Share)
\$246,500.00

20% Match Rate Calculations

Grant Amount - STIF Discretionary/STIF Intercommunity (80% State Share)
\$394,400.00

Match Amount - STIF Discretionary/STIF Intercommunity (20% Local Share)
\$98,600.00

Preventive Maintenance

Total Task Cost (Grant Amount + Match Amount)
\$80,000.00

Are matching funds available if the project is awarded?
Yes

Percent of funds used for fixed route transportation
100%

Project Task and Match Amounts

20% Match Rate Calculations

Grant Amount - STIF Discretionary/STIF Intercommunity/5311f (80% State/Fed Share)
\$64,000.00

Match Amount - STIF Discretionary/STIF Intercommunity/5311f (20% Local Share)
\$16,000.00

Application Totals

Match Sources

Match Sources	Amount
Local	\$312,000.00

Note on Application Totals: If applying for 5311(f) Operating, a 50% match rate is applied to identified Operating costs. However, the application form automatically applies a 20% match rate to the full Project Cost, including Operating costs. Therefore, Section 5311(f) applicants should ensure the accuracy of the Total Task Cost for each Task Category, as the 20% match rate will only apply to non-Operating costs in a 5311(f) grant award. The form is unable to calculate an accurate application total using two different match rates.

50% Match Rate Calculations

Grant Amount
\$246,500.00

Match Amount
\$246,500.00

20% Match Rate Calculations

Grant Amount
\$634,400.00

Match Amount
\$158,600.00

Document Upload (Optional)

Attachment A TCTD Organizational Chart.pdf

Attachment B Remix - Median Household Income.pdf

Attachment B Remix - Minority.pdf

Attachment B Remix - People per Square Mile.pdf

Attachment B Remix - Plain.pdf

Attachment B Remix - Senior.pdf

Oregon Department of Transportation



STIF Discretionary and Statewide Transit Network Application: FY 2021-23

Applicant Information

Agency Legal Name

Yamhill County

Agency Legal Address

535 NE 5th Street, McMinnville, Oregon 97128

Application Contact Name

Cynthia Thompson

Application Contact Title

Transit Manager

Application Contact Email Address

thompsonc@co.yamhill.or.us

Application Contact Phone Number

(503) 995-7965

Name of Person Signing Agreement

Ken Huffer

Title of Person Signing Agreement

Chief Administrative Officer

Email Address of Person Signing Agreement

hufferk@co.yamhill.or.us

Phone Number of Person Signing Agreement

(503) 474-6270

Agency Information

1. Transit Agency Type

County

1.A Does the agency have any existing grant agreements with ODOT?

Yes

2. What is the main type of service that will be supported by this award?

Fixed Route

3. Would this award support ongoing operations of an existing service?

No

Risk Assessment Information

4. Did your agency have any turnover of management or financial staff in the last two years?

No

5. Does your agency have an accounting system that allows you to completely and accurately track the receipt and disbursement of funds related to the award?

Yes

6. What type of accounting system does your agency use?

Combined

7. Does your agency have a system in place that will account for 100 percent of each employee's time?

Yes

8. Did your staff members attend required training and meetings during the previous biennium?

Yes

9. Was your agency audited by the federal government in the past two years?

No

10. Did your agency stay on budget in the past two years?

Yes

Agency Qualifications

11. Describe how your agency has the legal, managerial and operational capacity to perform and report on project progress within the scope, schedule and budget of the anticipated grant agreement. (Description of operational capacity should apply specifically for the workload of projects in this application.)

Yamhill County is an administrative department of the state with full legal authority to conduct its affairs. Transit in Yamhill County is run by a Transit Manager who relies on a vendor to provide all aspects of transit operations and maintenance. The same vendor would operate the proposed Hwy 99W pilot. Operating expenses include dispatch, demand response services, local and commuter route services throughout Yamhill County and maintenance for 30+ vehicles.

Yamhill County Transit operates Intercity routes on four corridors providing limited stops with focus on connecting cities and their residents to transit hubs in Hillsboro, Tigard, Salem, and Grand Ronde; Local fixed routes provide circulation within McMinnville and Newberg. Demand response service provides shared rides without a set schedule and includes ADA paratransit door to door service in Newberg and McMinnville and general public Dial-A-Ride curbside service within Yamhill County, primarily in McMinnville and Newberg.

12. Certification of Compliance

By checking this box, the applicant certifies that if they are awarded funding, they will meet and ensure compliance for the term of the agreement with applicable federal, state and local laws and regulations including, and not limited to, those pertaining to passenger transportation, civil rights, labor, insurance, safety and health.

Yes

13. Do you plan to use a Sub-Recipient or contractor to implement the grant supported activity?

Yes

13.A If Yes, please list the Sub-Recipient(s) and describe how the applicant will provide sufficient Sub-Recipient/contractor oversight to ensure eligibility is maintained while receiving STIF Discretionary or Statewide Transit Network moneys.

The contracted service provider for the proposed Hwy 99W pilot transit service would be First Group. They are the same contracted service provider that Yamhill County Transit uses to cover its entire service area. The relationship between First Group with Yamhill County has been constructive, which has assisted with contractor oversight. Contractor oversight has also been maintained by Yamhill County Transit by participating in periodic reviews by ODOT PTD.

14. If you seek the 10 percent match reduction, does the project meet one or more of the four factors identified in OAR 732-044-0005(4)(a)? Select each factor that you believe is exemplified by the proposed project.

Predominantly serves or provides access to and from rural communities

Serves an area outside of the applicant's geographic jurisdiction

Fills a significant gap in the Statewide Transit Network

Provides statewide benefits to multiple Public Transportation Service Providers outside of the area where the proposed project will be located

15. Will federal funds be used to complete this project?

No

Project Information

16.A Project Title

Hwy 99W Transit Corridor Pilot

16.B Describe the project to be funded. Clearly describe what the requested fund award would be used to accomplish, detailing the specific tasks and deliverables. Where relevant, identify the origin and destination of the proposed service as well as each municipality visited along the route. Please see page 22 of program guidance for additional guidance on writing a project description.

This project proposes to meet a need for public transit along the 99W corridor from McMinnville to Junction City that has been assessed as part of an ongoing Hwy 99W Transit Corridor Study managed by Oregon Cascades West Council of Governments with funding from the STIF Discretionary program. The consensus among participants in the the study, which includes representatives from Lane Transit District, Lane Council of Governments, Benton Area Transit, Salem Area Mass Transit and Yamhill County, thought that sufficient demand for transit exists on the corridor to launch pilot transit service. Two of the participants in the study, Yamhill County and Benton County, have agreed to a partnership to operate the pilot transit service.

For background, the City of Monroe is completely unserved by transit, and many areas along Hwy 99W are only accessible by private automobile. An overview map is included in Attachment 2, and additional information on the project scope and schedule are included in Attachment 3.

Currently, Lane Transit District operates service from Eugene to Junction City; Benton County serves the segment between Corvallis and Adair Village; Cherriots serves from Monmouth to Salem; and, Yamhill County Transit serves from Salem to McMinnville, and north to the Tigard Transit Center.

The project has been broken into three phases; Demand Analysis, Implementation Plan, and Operations. The Demand Analysis phase is nearly complete, with transit provider interviews, stakeholder surveys of existing and potential riders, and input from connecting transit service providers informing the decision to proceed with the next phases of the project. The second phase will refine route details , determine vehicle

type, and create a brand and marketing strategy. The final phase will involve operating the service for up to two years from the initial start date.

It's estimate that vehicle acquisition would take 9-12 months. This would allow the service to start in the summer 2022 while Yamhill County and Benton County assess and implement a sustainable funding strategy, which likely would initially have to rely on STIF Formula funding from the respective Qualified Entities. Traditional metrics for evaluating transit, including per revenue hour of operation, passenger boardings, and route on time percentage. The project phases have been further outlined in Attachment 3.

Yamhill County Transit and Benton Area Transit are well positioned to implement and manage the proposed transit service on Hwy 99W. Benton County extends south to the City of Monroe, which is approximately seven miles from Junction City and McMinnville is where Yamhill County Transit is located. The geographic location of the project partners will allow them to either split the service into northern and southern segments, or run the entire 70 plus mile route length while keeping dead heads to a minimum via scheduling.

The initial pilot transit service will involve four round trips per day (two by each partner), five days a week. The project partners would each have to acquire a primary and a backup bus (four total) to implement the pilot transit service. The scope of the proposal covers almost all of the rural communities on Hwy 99W, including the communities of Monroe, Corvallis, and Adair Village, Monmouth, Rickreal and Amity. The proposed pilot transit service would connect with Lane Transit District in Junction City, with four transit services in Corvallis, with Cherriots in Monmouth, with Tillamook County Transportation Service District in Rickreal and with Yamhill County Transit in Amity and McMinnville.

17. What Local Plans include this project or elements of the project? Be specific in the citation of the Local Plans.

This project is either directly supported or mentioned in five local, regional or state plans including:

Oregon Public Transportation Plan, Salem-Keizer Long Range Regional Transit Plan, Central Willamette Valley Regional Coordinated Care Plan, Benton County Transportation System Plan, and Corvallis Transportation System Plan.

While identification of the project in local plans is not required if it fills a gap in the STN, the integration of it in local plans further emphasizes the need for pilot transit service along Hwy 99W.

18. Please provide specific page(s) of the Local Plan(s) where project or funding need is listed.

A summary of each plan, the location, and appropriate page numbers is included in Attachment 4. Furthermore, the project fills a gap in the Statewide Transit Network, as identified in Attachment 2, and Attachment 5.

19. What is the minimum grant amount that will still allow your project to proceed?

\$527,360.00

20. Select the fund source(s) for which you would like to compete and that you believe your project is eligible to receive. Check all that apply.

STIF Discretionary

STIF Intercommunity Discretionary

21. Rank the fund sources in the order of preference with 1 being first choice and 3 being the last choice.

STIF Discretionary

2

STIF Intercommunity Discretionary

1

FTA Section 5311(f) Intercity

No Preference

22. Why is this an important project? What are the consequences of this project not receiving funding?

If the project is not funded, small cities along Highway 99W, such as Monroe, Adair Villiage, Monmouth, Rickreal and Amity, will continue to be unserved or underserved by transit; this will likely require travelers to use the only transportation option available to them, automobiles.

The need for the proposed pilot transit service has been validated by a transit corridor study in which over half of ~500 survey respondents strongly supported it and by enthusiastic support from staff participants from transit partners like LTD, Cherriots and Lane in a recent Hwy 99W transit corridor study Technical Advisory Committee meeting.

The Hwy 99W transit service pilot will not only provide a valuable transportation option to low income households in communities like Junction City, Monroe, Monmouth, Rickreal and Amity, it will serve as an important north/south connection for existng transit services operating between the Oregon Coast and the Willamette Valley. Pilot transit service along Hwy 99W would also connect three university campuses (Linfield University in McMinnville, Western Oregon University in Monmouth and Oregon State University in Corvallis), which would allow students at each university to visit friends or travel home by bus. The momentum gained by conducting a transit corridor study for Hwy 99W would be lost if a transit service pilot is delayed.

23. Will this project involve breaking ground or any other activity that might require environmental review per federal requirements?

No

Oregon Transportation Commission Investment Priorities

Equity and Public Transportation Service to Low-Income Households

24. Describe how this project would support and improve access for vulnerable populations and/or historically marginalized communities.

Attachment 6 is a map of the communities along the 99W Corridor this project would connect with larger metropolitan areas. All cities have a higher or nearly equal percentage of low income residents compared with the State of Oregon. Additionally, Monroe, which is currently unserved by any transit, has over twice the state average for people with disabilities. Collectively, the small communities along Hwy 99W represent 75,000 additional riders that would have access to transit and amenities located in the three largest metropolitan areas in the state.

Coordination of Public Transportation Services

25. Describe how this project would improve the passenger experience, benefit multiple transit providers, or involve consolidation, coordination, or resource sharing between agencies, including use of transportation data and technology.

The proposed Hwy 99W transit service pilot touches four Oregon counties, where seven public transit

providers currently operate. The Hwy 99W corridor study is a regional collaboration. Indeed, the minutes of a recent Hwy 99W transit corridor study Technical Advisory Committee meeting demonstrates widespread support among western Willamette Valley transit providers. That meeting also yielded the partnership between Benton Area Transit and Yamhill County Transit, which is an important collaboration for future contributions to the STN.

Benton County, which has the project identified in their transportation system plan, currently operates service between Corvallis and Adair Village. Yamhill County currently operates service between McMinnville and Amity. The project partners plan to coordinate the four buses used for the proposed route, with each operating half of the service through independent purchased service contracts.

The proposed pilot transit service along Hwy 99W will serve as an important north/south connection for existing transit services operating between the Oregon Coast and the Willamette Valley. The new north/south connection would alleviate the need to travel all the way to the I-5 corridor to go north or south by bus through the Willamette Valley. This could significantly improve the rider experience for people wishing to transfer from connecting transit services coming from the Oregon Coast, as it eliminates out of direction travel. The proposed pilot would also connect three university campuses (Linfield University in McMinnville, Western Oregon University in Monmouth and Oregon State University in Corvallis), which would allow students at each university to visit friends or travel home by bus.

Environmental and Public Health

26. Describe how this project would go beyond providing an alternative to personal car use to reduce greenhouse gas emissions, reduce pollution, and/or support positive health outcomes.

Rural communities along Highway 99W, such as Monroe, Adair Villiage, Monmouth, Rickreal and Amity, have limited, or no access to public transit, which requires most travelers along the corridor to use the only transportation option available to them, automobiles.

Through the expansion of transit service to communities previously unserved or underserved, the proposed transit service pilot will provide a method of travel other than single passenger vehicles to more of the Oregon population. By improving transit access, positive health outcomes are supported by offering active transportation options.

Safety, Security, and Community Livability

27. Describe how the project would increase use and participation in active transportation, including public transportation.

As mentioned earlier, this project would indirectly connect nearly 75,000 people to the three largest metropolitan areas in the state. Providing access to these residents would encourage the use of public transportation for commuting, trips to the store, and potentially recreational trips on the weekend.

The proposed pilot transit service along Hwy 99W will also serve as an important north/south connection for existing transit services operating between the Oregon Coast and the Willamette Valley. The new north/south connection would alleviate the need to travel all the way to the I-5 corridor to travel north or south by bus through the Willamette Valley. This will greatly improve the rider experience for riders wishing to transfer from connecting transit services coming from the Oregon Coast, as it eliminates out of direction travel. Furthermore, the proposed pilot would also connect three university campuses (Linfield University in McMinnville, Western Oregon University in Monmouth and Oregon State University in Corvallis), which would allow students at each university to visit friends or travel home by bus.

Attachment 7 demonstrates the critical regional link this service would provide.

28. Describe how the project would support and improve safety of passengers in transit vehicles

and safety of other roadway users.

The 99W corridor, outside of city centers, is perceptibly safe for public transportation and the addition of a route through the rural areas provides for risk reduction across all travel modes. While this route serves some of the larger cities along the 99W corridor, it covers a primarily rural geography. Public transportation options are generally limited in rural communities, leaving people to take other modes of transportation for work, recreation, and personal use.

By providing pilot transit service that serves job centers, public and private recreation options along Hwy 99W, and shopping and medical providers, passengers will be able to access their needs without opting for a single-occupancy vehicle trip, or biking or walking in a potentially unsafe environment (45 mph +, with sporadic sidewalks and bike lanes).

Other roadway users may benefit from this service by increased ridership lessening traffic and limiting the number of other users on the road and thereby reducing possible accidents at conflicts points.

Statewide Transit Network Connections

29. Describe how this project would support and improve the utility and connectivity of the Statewide Transit Network and/or create a foundation for future Statewide Transit Network improvements.

If the project is fully funded, four Category C buses (two each for Yamhill County Transit and Benton Area Transit) will be required to serve anticipated demand along the 99W corridor. A procurement will be necessary to acquire the buses, so exact numbers aren't currently available on the cost of the buses. However, Category C buses typically cost about \$175,000 each and \$700,000 has therefore been budgeted for bus acquisitions.

Funding and Strategic Investment

30. Describe how the project match requirements will be met or exceeded. Describe why investment in this project makes sense from both the perspective of current need and long term Oregon transit needs.

The anticipated match requirement for the Hwy 99W transit service pilot will be satisfied through Yamhill County's and Benton County's STIF Formula funds (the project is identified in the Yamhill County TDP and the Benton County TSP), since the pilot will predominantly serve rural areas; the match would therefore be 10%. If the STIF Formula funding requests are unsuccessful, partner transit agencies in the region will be approached to share the cost of match. Long term funding strategies will be explored by the project partners in collaboration with other transit providers, and state and federal agencies.

The proposed pilot transit service along Hwy 99W will also serve as an important north/south connection for existing transit services operating between the Oregon Coast and the Willamette Valley. The new north/south connection would alleviate the need to travel all the way to the I-5 corridor to travel north or south by bus through the Willamette Valley. This will greatly improve the rider experience for riders wishing to transfer from connecting transit services coming from the Oregon Coast, as it eliminates out of direction travel. Furthermore, the proposed pilot would also connect three university campuses (Linfield University in McMinnville, Western Oregon University in Monmouth and Oregon State University in Corvallis), which would allow students at each university to visit friends or travel home by bus.

31. If this project will last beyond the 2021-23 biennium, describe the plan for ongoing funding including match. If not applicable, type N/A.

Long term funding for the Hwy 99W transit service pilot, should it prove useful, will come from Yamhill County's and Benton County's STIF Formula funds. The project partners have agreed to include transit service along Hwy 99W in their respective STIF Plans for the '23 - '25 biennium should the pilot prove that transit service along the corridor can be productive. Matching funds are not required for projects listed in a

local QE's STIF Plan.

32. Does this project depend on other funding sources including other discretionary grants whose outcomes are uncertain? If yes, please list those fund sources. If not applicable, type N/A.

The anticipated 10% match for the Hwy 99W transit service pilot will come from Yamhill County's and Benton County's STIF Formula funds for the '21 - '23 biennium.

33. Capital Asset Purchases

Describe proposed capital purchases. If no capital assets are included in your application, type N/A.

Two Category C buses at \$175,000 each.
Two sets of signs and shelters for stops in Rickreal and Monmouth.

Project Details

Task Category

- Vehicle Purchase
- Signs/Shelters Purchase
- Planning
- Project Administration
- Operating

Vehicle Purchase

Is this a vehicle expansion, vehicle replacement, or both?

Vehicle Expansion

Vehicle Expansion

Will you use the Oregon state price agreement contract?

Yes

Will this grant award support purchase of a used vehicle?

No

Vehicles to be purchased

Vehicle ALI	Make/ Model	Quantity	Cost Each	Total	# of seats / # ADA station s deploy ed	# of seats with ADA	Fuel System	Est. Order Date	Est. D elivery Date
11.12.04 Bus < 30 FT	E450	2	\$175,000.0 0	\$350,000.0 0	1,602	18	Gas (G)	7/15/20 21	5/16/2 022

Total:
2

**Grand
Total:**
\$350,000.0
0

Total Project Cost (Grant Amount + Match Amount)
\$350,000.00

Are matching funds available if the project is awarded?
Yes

Percent of funds to be used for fixed route transportation
100%

Project Task and Match Amounts

20% Match Rate Calculations

Grant Amount - STIF Discretionary/STIF Intercommunity/5311f (80% State/Fed Share)
\$280,000.00

Match Amount - STIF Discretionary/STIF Intercommunity/5311f (20% Local Share)
\$70,000.00

10% Match Rate Calculations (For Qualified Applicants)

Grant Amount - STIF Discretionary/STIF Intercommunity (90% State Share)
\$315,000.00

Match Amount - STIF Discretionary/STIF Intercommunity (10% Local Share)
\$35,000.00

Signs/Shelters Purchase

Signs/Shelters Request

Item Description	Quantity	Cost Each (Project Cost)	Total Cost	Est. Order Date	Est. Delivery Date
Shelters/Signs/Schedule Graphics	2	\$25,000.00	50,000.00	9/15/2021	3/15/2022

Total: 2

**Grand Total:
50,000.00**

Total Task Cost (Grant Amount + Match Amount)
\$50,000.00

Are matching funds available if the project is awarded?
Yes

Percent of funds used for fixed route transportation
100%

Project Task and Match Amounts

20% Match Rate Calculations

Grant Amount - STIF Discretionary/STIF Intercommunity/5311f (80% State/Fed Share)
\$40,000.00

Match Amount - STIF Discretionary/STIF Intercommunity/5311f (20% Local Share)
\$10,000.00

10% Match Rate Calculations (For Qualified Applicants)

Grant Amount - STIF Discretionary/STIF Intercommunity (90% State Share)
\$45,000.00

Match Amount - STIF Discretionary/STIF Intercommunity (10% Local Share)
\$5,000.00

Planning

Total Task Cost (Grant Amount + Match Amount)
\$20,000.00

Are matching funds available if the project is awarded?
Yes

Percent of funds used for fixed route transportation
100%

Project Task and Match Amounts

20% Match Rate Calculations

Grant Amount - STIF Discretionary/STIF Intercommunity/5311f (80% State/Fed Share)
\$16,000.00

Match Amount - STIF Discretionary/STIF Intercommunity/5311f (20% Local Share)
\$4,000.00

10% Match Rate Calculations (For Qualified Applicants)

Grant Amount - STIF Discretionary/STIF Intercommunity (90% State Share)
\$18,000.00

Match Amount - STIF Discretionary/STIF Intercommunity (10% Local Share)
\$2,000.00

Project Administration

Total Task Cost (Grant Amount + Match Amount)
\$90,000.00

Are matching funds if the project is awarded?
Yes

Percent of funds used for fixed route transportation
100%

Project Task and Match Amounts

20% Match Rate Calculations

Grant Amount - STIF Discretionary/STIF Intercommunity/5311f (80% State/Fed Share)
\$72,000.00

Match Amount - STIF Discretionary/STIF Intercommunity/5311f (20% Local Share)
\$18,000.00

10% Match Rate Calculations (For Qualified Applicants)

Grant Amount - STIF Discretionary/STIF Intercommunity (90% State Share)
\$81,000.00

Match Amount - STIF Discretionary/STIF Intercommunity (10% Local Share)
\$9,000.00

Operating

Total Task Cost (Grant Amount + Match Amount)
\$270,400.00

Are matching funds available if the project is awarded?
Yes

Percent of funds used for fixed route transportation
100%

Project Task and Match Amounts

20% Match Rate Calculations

Grant Amount - STIF Discretionary/STIF Intercommunity (80% State Share)
\$216,320.00

Match Amount - STIF Discretionary/STIF Intercommunity (20% Local Share)
\$54,080.00

10% Match Rate Calculations (For Qualified Applicants)

Grant Amount - STIF Discretionary/STIF Intercommunity (90% State Share)
\$243,360.00

Match Amount - STIF Discretionary/STIF Intercommunity (10% Local Share)
\$27,040.00

Application Totals

Match Sources

Match Sources	Amount
State	\$78,040.00

Note on Application Totals: If applying for 5311(f) Operating, a 50% match rate is applied to identified Operating costs. However, the application form automatically applies a 20% match rate to the full Project Cost, including Operating costs. Therefore, Section 5311(f) applicants should ensure the accuracy of the Total Task Cost for each Task Category, as the 20% match rate will only apply to non-Operating costs in a 5311(f) grant award. The form is unable to calculate an accurate application total using two different match rates.

20% Match Rate Calculations

Grant Amount
\$624,320.00

Match Amount
\$156,080.00

10% Match Rate Calculations (For Qualified Applicants)

Grant Amount
\$702,360.00

Match Amount
\$78,040.00

Document Upload (Optional)

YamhillCounty_Hwy99W_Pilot_ApplicationAttachments_final.pdf



To: Board of Directors

From: Gregg Thompson, Maintenance Manager
Tom Dietz, Director of Operations

Thru: Allan Pollock, General Manager

Date: February 25, 2021

Subject: Authorize the General Manager to Execute a Contract with Western Bus Sales, Inc. for the Purchase of Seven (7) Cherriots Regional Buses

ISSUE

Shall the Board authorize the General Manager to execute a contract with Western Bus Sales, Inc. for the purchase of seven revenue service vehicles which include, four (4) Category B buses for replacement, and three (3) Category B expansion buses for the Cherriots Regional service, for an amount not to exceed \$1,769,353?

BACKGROUND AND FINDINGS

SAMTD's current fleet for delivery of Cherriots Regional service consists of 13 vehicles varying by size including seven Category B and four Category D vehicles (cutaway style). Regular replacement of these vehicles is necessary to ensure safe, efficient delivery of this service. In accordance with the District's Transit Asset Management Plan and State of Good Repair planning, SAMTD staff is committed to ensuring our vehicles are replaced at a schedule consistent with industry best practices. The four (4) vehicles scheduled to be replaced will reach 13-16 years of age and average 410,000 miles, which far exceeds the 10-year 350,000 mile Useful Life Benchmark set by the Federal Transit Administration.

The contract price is based on the State of Oregon price agreement, and was procured under procedures set by the Oregon Department of Transportation's Public Transit Division. In accordance with these procedures, SAMTD staff issued a formal, competitive Invitation to Bid for medium-size Category B vehicles. Western Bus Sales, Inc. met all required specifications and was the lowest cost.

The three (3) Category B vehicles will support the expansion of service that is funded by the Statewide Transportation Improvement Fund (STIF). This includes additional trips on existing regional routes as well as a new regional route.

FINANCIAL IMPACT

Funding for this proposed contract is included in the Capital Projects Budget of SAMTD's Adopted FY2021 Budget. Vehicle costs are listed in Table 1 below:

TABLE 1

CATEGORY	PRICE	QUANTITY	TOTAL
Category B Bus	\$ 248,479	7	\$ 1,739,353
Contingency	\$ 30,000	1	\$ 30,000
GRAND TOTAL:			\$1,769,353

Funding for the proposed contract are covered through grants consisting of STIF Discretionary, STIF Formula and matching funds.

RECOMMENDATION

Staff recommends that the Board authorize the General Manager to execute a contract with Western Bus Sales, Inc. for the purchase of four (4) replacement buses and three (3) expansion buses for operation of the Cherriots Regional service, in an amount not to exceed \$1,769,353.

PROPOSED MOTION

I move the Board authorize the General Manager to execute a contract with Western Bus Sales, Inc. for the purchase of four (4) replacement buses and three (3) expansion buses for the operation of the Cherriots Regional service in an amount not-to-exceed \$1,769,353?



BOARD MEETING MEMO

Agenda Item No. H.1

To: Board of Directors

From: Chris French, Service Planning Manager
David Trimble, Deputy General Manager

Thru: Allan Pollock, General Manager

Date: February 25, 2021

Subject: Performance Report – FY21 Q2

ISSUE

Shall the Board receive the quarterly information briefing on Cherriots services for the second quarter of FY21?

BACKGROUND AND FINDINGS

Performance measures (daily average revenue hours, daily average revenue miles, daily average rides and top 10 system bus stops) for the second quarter of Fiscal Year 2021 (FY21 Q2) are included in Attachment A. FY21 Q2 began October 1, 2020 and ended December 31, 2020. All weekday and Saturday data are compared to the previous fiscal year, FY20 Q2. Year-to-date totals (total revenue hours, total revenue miles, and total rides) are also included in Attachment A and are gathered from FY21 Q2. Weekday totals are compared to those in the same time period of FY20. Saturday totals are not compared to FY20 due to the fact that Saturday service did not begin until September of 2019. The data for these measures are derived from adjusted Trapeze schedules, vehicle fare boxes, rider counting systems, and reservation software (Route Match).

Data for this quarter reflects the changes to service made in response to the COVID-19 pandemic. The changes that took place have affected all areas of this report. Most notably the daily average revenue hours, daily average revenue miles, daily average rides, and fares. Some routes were not in operation for the entire quarter while others operated at reduced levels. Due to these circumstances we have also included data to compare FY21 Q2 to FY21 Q1 to help illustrate how service is changing in the current pandemic environment.

Revenue Hours, Revenue Miles, Rides, and Fares

Cherriots Local

Includes local bus service, local commuter express service, and Qualified Human Service Organization routes.

- *Revenue Hours* –
 - Weekday - Decreased by 12.8 hours on average per day, (-1.8%).
 - Saturday – No change in average hours per day.
- *Revenue Miles* –
 - Weekday - Decreased by 140.3 miles on average per day, (-1.6%).
 - Saturday – Increased by 26.5 miles on average per day, (0.6%).
- *Rides* –
 - Weekday - Decreased by 6757.4 rides per day, (-52.9%).
 - Saturday – Decreased by 1843.2 rides per day, (-33.6%).
 - Total Ridership between both was 424,078.
- *Fares* – In an effort to reduce the spread of COVID-19, no fares were collected during Q2.

Cherriots Regional Express

Includes regional commuter express routes.

- *Revenue Hours* –
 - Weekday – Increased by 1 hour on average per day, (1.5%).
 - Saturday – Decreased by 0.3 hours on average per day, (-1%).
- *Revenue Miles* –
 - Weekday – No change in average miles per day.
 - Saturday – Decreased by 35.2 miles on average per day, (-4.8%).
- *Rides* –
 - Weekday – Decreased by 201.5 rides on average per day, (-50.3%).
 - Saturday – Decreased by 43.4 rides on average per day, (-34.9%).
 - Total Ridership between both was 13,621.
- *Fares* – In an effort to reduce the spread of COVID-19, no fares were collected during Q2.

Cherriots Regional Flex

Includes the Polk County Flex (operates weekdays only; resumed operation on October 12, 2020)

- *Revenue Hours* –
 - Decreased by 10.4 hours on average per day, (-87.9%).
- *Revenue Miles* –
 - Decreased by 118.5 hours on average per day, (-87%).
- *Rides* –
 - Decreased by 19.7 rides on average per day, (-86.2%).
 - Total Ridership was 198.
- *Fares* – In an effort to reduce the spread of COVID-19, no fares were collected during Q2.

Cherriots Shop and Ride

Includes dial-a-ride and shopper shuttle.

- *Rides* –
 - Shopper Shuttle did operate during Q2.
 - Dial-a-ride – Decreased by 0.2 rides per day on average, (-1.5%)

Cherriots LIFT

Paratransit

- *Rides* –
 - Weekday – Decreased by 348.2 rides per day on average, (-39.4%).
 - Saturday – Increased by 22.1 rides per day on average, (31.4%).
 - Total Ridership between both was 12,268.

FINANCIAL IMPACT

Information item only.

RECOMMENDATION

Information item only.

PROPOSED MOTION

Information item only.

Table 1. Total Revenue Hours

Route	FY20 Q2				FY21 Q2			
	Oct 2019	Nov 2019	Dec 2019	Total	Oct 2020	Nov 2020	Dec 2020	Total
(Service Days)	23	19	21	63	22	19	22	63
LOCAL BUS SERVICE								
2 - Market / Brown	1,406	1,161	1,284	3,851	1,269	1,211	1,269	3,749
3 - Portland Road	732	605	669	2,006	659	630	660	1,949
4 - State Street	754	623	688	2,065	677	646	677	2,000
5 - Center Street	1,340	1,107	1,223	3,670	1,237	1,181	1,237	3,655
6 - Fairview Industrial	519	429	474	1,422	493	471	493	1,457
7 - Mission Street	557	460	509	1,526	494	471	494	1,459
8 - 12th / Liberty	597	493	545	1,635	483	461	483	1,427
9 - Cherry / River Road	707	584	645	1,936	675	644	675	1,994
11 - Lancaster / Verda	2,505	2,068	2,288	6,861	2,248	2,146	2,242	6,636
12 - Hayesville Drive	340	281	310	931	325	310	325	960
13 - Silverton Road	473	391	432	1,296	653	623	653	1,929
14 - Windsor Island Road	354	292	323	969	336	320	335	991
16 - Wallace Road	232	191	211	634	209	199	209	617
17 - Edgewater Street	1,182	977	1,078	3,237	1,085	1,036	1,084	3,205
18 - 12th / Liberty	584	483	534	1,601	494	471	494	1,459
19 - Broadway / River Road	1,378	1,139	1,257	3,774	1,288	1,230	1,287	3,805
21 - South Commercial	1,313	1,085	1,200	3,598	1,228	1,171	1,228	3,627
22 - Library Loop	267	221	244	732	0	0	0	0
23 - Lansing / Hawthorne	343	283	313	939	328	313	328	969
26 - Glen Creek / Orchard Heights	180	149	164	493	172	164	172	508
27 - Glen Creek / Eola	192	159	176	527	184	176	184	544
<i>Total</i>	15,955	13,181	14,567	43,703	14,537	13,874	14,529	42,940
LOCAL COMMUTER EXPRESS ROUTES								
1X - Wilsonville / Salem Express	274	226	250	750	262	250	262	774
QUALIFIED HUMAN SERVICE ORGANIZATION ROUTES								
9192 - Garten / Rockwest	25	21	23	69	0	0	0	0
<i>Cherriots Local Total</i>	16,254	13,428	14,840	44,522	14,799	14,124	14,791	43,714
REGIONAL EXPRESS ROUTES								
10X - Woodburn / Salem Express	385	325	357	1,067	382	331	384	1,097
20X - N. Marion Co. / Salem Express	299	259	283	841	299	256	293	848
30X - Santiam / Salem Express	275	231	256	762	254	235	272	761
40X - Polk County / Salem Express	424	348	390	1,162	412	357	410	1,179
50X - Dallas / Salem Express	130	106	121	357	128	111	128	367
<i>Cherriots Regional Express Monthly Total</i>	1,513	1,269	1,407	4,189	1,475	1,290	1,487	4,252
REGIONAL FLEX ROUTE								
Polk County Flex	269	235	239	743	47	37	6	90
SHOP AND RIDE								
Dial-a-Ride	241	201	222	664	262	189	201	652
Shopper Shuttle	115	97	108	320	0	0	0	0
<i>Cherriots Shop and Ride Total</i>	356	298	330	984	262	189	201	652
LIFT								
ADA	2,692	2,163	2,379	7,234	2,270	2,016	2,088	6,374
DD53	3,070	2,434	2,669	8,173	522	112	99	733
<i>Cherriots LIFT Total</i>	5,762	4,597	5,048	15,407	2,792	2,128	2,187	7,107

Table 2. Average Revenue Hours / Day

Route (Service Days)	FY20 Q2				FY21 Q2				Percent Change
	Oct 2019	Nov 2019	Dec 2019	Total	Oct 2020	Nov 2020	Dec 2020	Total	
(Service Days)	23	19	21	63	22	19	22	63	
LOCAL BUS SERVICE									
2 - Market / Brown	61.1	61.1	61.1	61.1	57.7	63.7	57.7	59.5	-2.6%
3 - Portland Road	31.8	31.8	31.9	31.8	30.0	33.2	30.0	30.9	-2.8%
4 - State Street	32.8	32.8	32.8	32.8	30.8	34.0	30.8	31.7	-3.1%
5 - Center Street	58.3	58.3	58.2	58.3	56.2	62.2	56.2	58.0	-0.4%
6 - Fairview Industrial	22.6	22.6	22.6	22.6	22.4	24.8	22.4	23.1	2.5%
7 - Mission Street	24.2	24.2	24.2	24.2	22.5	24.8	22.5	23.2	-4.4%
8 - 12th / Liberty	26.0	25.9	26.0	26.0	22.0	24.3	22.0	22.7	-12.7%
9 - Cherry / River Road	30.7	30.7	30.7	30.7	30.7	33.9	30.7	31.7	3.0%
11 - Lancaster / Verda	108.9	108.8	109.0	108.9	102.2	112.9	101.9	105.3	-3.3%
12 - Hayesville Drive	14.8	14.8	14.8	14.8	14.8	16.3	14.8	15.2	3.1%
13 - Silverton Road	20.6	20.6	20.6	20.6	29.7	32.8	29.7	30.6	48.8%
14 - Windsor Island Road	15.4	15.4	15.4	15.4	15.3	16.8	15.2	15.7	2.3%
16 - Wallace Road	10.1	10.1	10.0	10.1	9.5	10.5	9.5	9.8	-2.7%
17 - Edgewater Street	51.4	51.4	51.3	51.4	49.3	54.5	49.3	50.9	-1.0%
18 - 12th / Liberty	25.4	25.4	25.4	25.4	22.5	24.8	22.5	23.2	-8.9%
19 - Broadway / River Road	59.9	59.9	59.9	59.9	58.5	64.7	58.5	60.4	0.8%
21 - South Commercial	57.1	57.1	57.1	57.1	55.8	61.6	55.8	57.6	0.8%
22 - Library Loop	11.6	11.6	11.6	11.6	0.0	0.0	0.0	0.0	-100.0%
23 - Lansing / Hawthorne	14.9	14.9	14.9	14.9	14.9	16.5	14.9	15.4	3.2%
26 - Glen Creek / Orchard Heights	7.8	7.8	7.8	7.8	7.8	8.6	7.8	8.1	3.0%
27 - Glen Creek / Eola	8.3	8.4	8.4	8.4	8.4	9.3	8.4	8.6	3.2%
<i>Total</i>	<i>693.7</i>	<i>693.7</i>	<i>693.7</i>	<i>693.7</i>	<i>660.8</i>	<i>730.2</i>	<i>660.4</i>	<i>681.6</i>	<i>-1.7%</i>
LOCAL COMMUTER EXPRESS ROUTES									
1X - Wilsonville / Salem Express	11.9	11.9	11.9	11.9	11.9	13.2	11.9	12.3	3.2%
QUALIFIED HUMAN SERVICE ORGANIZATION ROUTES									
9192 - Garten / Rockwest	1.1	1.1	1.1	1.1	0.0	0.0	0.0	0.0	-100.0%
<i>Cherriots Local Total</i>	<i>706.7</i>	<i>706.7</i>	<i>706.7</i>	<i>706.7</i>	<i>672.7</i>	<i>743.4</i>	<i>672.3</i>	<i>693.9</i>	<i>-1.8%</i>
REGIONAL EXPRESS ROUTES									
10X - Woodburn / Salem Express	16.7	17.1	17.0	16.9	17.4	17.4	17.5	17.4	2.8%
20X - N. Marion Co. / Salem Express	13.0	13.6	13.5	13.3	13.6	13.5	13.3	13.5	0.8%
30X - Santiam / Salem Express	12.0	12.2	12.2	12.1	11.5	12.4	12.4	12.1	-0.1%
40X - Polk County / Salem Express	18.4	18.3	18.6	18.4	18.7	18.8	18.6	18.7	1.5%
50X - Dallas / Salem Express	5.7	5.6	5.8	5.7	5.8	5.8	5.8	5.8	2.8%
<i>Cherriots Regional Express Monthly Total</i>	<i>65.8</i>	<i>66.8</i>	<i>67.0</i>	<i>66.5</i>	<i>67.0</i>	<i>67.9</i>	<i>67.6</i>	<i>67.5</i>	<i>1.5%</i>
REGIONAL FLEX ROUTE									
Polk County Flex	11.7	12.4	11.4	11.8	2.1	1.9	0.3	1.4	-87.9%
SHOP AND RIDE									
Dial-a-Ride	10.5	12.6	10.6	11.1	11.9	12.6	9.1	11.1	-0.1%
Shopper Shuttle	5.0	6.1	5.1	5.3	0.0	0.0	0.0	0.0	-100.0%
<i>Cherriots Shop and Ride Total</i>	<i>15.5</i>	<i>18.6</i>	<i>15.7</i>	<i>16.4</i>	<i>11.9</i>	<i>12.6</i>	<i>9.1</i>	<i>11.1</i>	<i>-32.6%</i>
LIFT									
ADA	117.0	113.8	113.3	114.8	103.2	106.1	94.9	101.2	-11.9%
DD53	133.5	128.1	127.1	129.7	23.7	5.9	4.5	11.6	-91.0%
<i>Cherriots LIFT Total</i>	<i>250.5</i>	<i>241.9</i>	<i>240.4</i>	<i>244.6</i>	<i>126.9</i>	<i>112.0</i>	<i>99.4</i>	<i>112.8</i>	<i>-53.9%</i>

Table 3. Total Revenue Miles

Route (Service Days)	FY20 Q2				FY21 Q2			
	Oct 2019 23	Nov 2019 19	Dec 2019 21	Total 63	Oct 2020 22	Nov 2020 19	Dec 2020 22	Total 63
LOCAL BUS SERVICE								
2 - Market / Brown	16,309	13,469	14,897	44,675	15,769	15,052	15,762	46,583
3 - Portland Road	8,592	7,098	7,845	23,535	7,698	7,355	7,705	22,758
4 - State Street	7,382	6,098	6,740	20,220	6,635	6,334	6,635	19,604
5 - Center Street	15,238	12,591	13,906	41,735	14,083	13,432	14,083	41,598
6 - Fairview Industrial	7,738	6,393	7,066	21,197	7,402	7,065	7,402	21,869
7 - Mission Street	5,209	4,303	4,756	14,268	4,478	4,274	4,478	13,230
8 - 12th / Liberty	7,842	6,465	7,154	21,461	6,520	6,223	6,520	19,263
9 - Cherry / River Road	10,421	8,609	9,510	28,540	9,968	9,515	9,968	29,451
11 - Lancaster / Verda	33,384	27,565	30,491	91,440	29,590	28,237	29,503	87,330
12 - Hayesville Drive	4,526	3,739	4,133	12,398	4,461	4,259	4,461	13,181
13 - Silverton Road	6,702	5,537	6,119	18,358	6,010	5,737	6,010	17,757
14 - Windsor Island Road	5,213	4,306	4,760	14,279	4,986	4,760	4,979	14,725
16 - Wallace Road	3,039	2,510	2,774	8,323	2,698	2,569	2,698	7,965
17 - Edgewater Street	10,615	8,769	9,692	29,076	9,813	9,369	9,808	28,990
18 - 12th / Liberty	7,784	6,441	7,111	21,336	6,651	6,349	6,651	19,651
19 - Broadway / River Road	15,095	12,478	13,777	41,350	14,072	13,432	14,060	41,564
21 - South Commercial	16,156	13,345	14,756	44,257	15,312	14,598	15,312	45,222
22 - Library Loop	1,363	1,126	1,245	3,734	0	0	0	0
23 - Lansing / Hawthorne	4,409	3,642	4,025	12,076	4,217	4,025	4,217	12,459
26 - Glen Creek / Orchard Heights	1,759	1,453	1,606	4,818	1,683	1,607	1,683	4,973
27 - Glen Creek / Eola	2,618	2,162	2,390	7,170	2,504	2,390	2,504	7,398
<i>Total</i>	<i>191,394</i>	<i>158,099</i>	<i>174,753</i>	<i>524,246</i>	<i>174,550</i>	<i>166,582</i>	<i>174,439</i>	<i>515,571</i>
LOCAL COMMUTER EXPRESS ROUTES								
1X - Wilsonville / Salem Express	8,819	7,286	8,053	24,158	8,428	8,045	8,428	24,901
QUALIFIED HUMAN SERVICE ORGANIZATION ROUTES								
9192 - Garten / Rockwest	331	274	302	907	0	0	0	0
<i>Cherriots Local Total</i>	<i>200,544</i>	<i>165,659</i>	<i>183,108</i>	<i>549,311</i>	<i>182,978</i>	<i>174,627</i>	<i>182,867</i>	<i>540,472</i>
REGIONAL EXPRESS ROUTES								
10X - Woodburn / Salem Express	8,072	6,698	7,342	22,112	7,746	6,724	7,717	22,187
20X - N. Marion Co. / Salem Express	6,586	5,624	6,231	18,441	6,403	5,676	6,536	18,615
30X - Santiam / Salem Express	6,072	5,027	5,528	16,627	4,772	5,069	5,791	15,632
40X - Polk County / Salem Express	8,941	7,506	8,296	24,743	8,858	7,670	8,854	25,382
50X - Dallas / Salem Express	3,003	2,494	2,749	8,246	2,938	2,502	2,950	8,390
<i>Cherriots Regional Express Monthly Total</i>	<i>32,674</i>	<i>27,349</i>	<i>30,146</i>	<i>90,169</i>	<i>30,717</i>	<i>27,641</i>	<i>31,848</i>	<i>90,206</i>
REGIONAL FLEX ROUTE								
Polk County Flex	3,314	2,593	2,672	8,579	577	455	80	1,112
SHOP AND RIDE								
Dial-a-Ride	2,870	2,370	2,643	7,883	2,663	1,829	1,985	6,477
Shopper Shuttle	655	539	595	1,789	0	0	0	0
<i>Cherriots Shop and Ride Total</i>	<i>3,525</i>	<i>2,909</i>	<i>3,238</i>	<i>9,672</i>	<i>2,663</i>	<i>1,829</i>	<i>1,985</i>	<i>6,477</i>
LIFT								
ADA	32,700	26,248	28,398	87,346	26,115	22,075	23,627	71,817
DD53	37,822	30,078	32,356	100,256	6,794	1,674	1,506	9,974
<i>Cherriots LIFT Total</i>	<i>70,522</i>	<i>56,326</i>	<i>60,754</i>	<i>187,602</i>	<i>32,909</i>	<i>23,749</i>	<i>25,133</i>	<i>81,791</i>

Table 4. Average Revenue Miles / Day

Route	FY20 Q2				FY21 Q2				Percent Change
	Oct 2019	Nov 2019	Dec 2019	Total	Oct 2020	Nov 2020	Dec 2020	Total	
(Service Days)	23	19	21	63	22	19	22	63	
LOCAL BUS SERVICE									
2 - Market / Brown	709.1	708.9	709.4	709.1	716.8	792.2	716.5	739.4	4.3%
3 - Portland Road	373.6	373.6	373.6	373.6	349.9	387.1	350.2	361.2	-3.3%
4 - State Street	321.0	320.9	321.0	321.0	301.6	333.4	301.6	311.2	-3.0%
5 - Center Street	662.5	662.7	662.2	662.5	640.1	706.9	640.1	660.3	-0.3%
6 - Fairview Industrial	336.4	336.5	336.5	336.5	336.5	371.8	336.5	347.1	3.2%
7 - Mission Street	226.5	226.5	226.5	226.5	203.5	224.9	203.5	210.0	-7.3%
8 - 12th / Liberty	341.0	340.3	340.7	340.7	296.4	327.5	296.4	305.8	-10.2%
9 - Cherry / River Road	453.1	453.1	452.9	453.0	453.1	500.8	453.1	467.5	3.2%
11 - Lancaster / Verda	1,451.5	1,450.8	1,452.0	1,451.4	1,345.0	1,486.2	1,341.0	1,386.2	-4.5%
12 - Hayesville Drive	196.8	196.8	196.8	196.8	202.8	224.2	202.8	209.2	6.3%
13 - Silverton Road	291.4	291.4	291.4	291.4	273.2	301.9	273.2	281.9	-3.3%
14 - Windsor Island Road	226.7	226.6	226.7	226.7	226.6	250.5	226.3	233.7	3.1%
16 - Wallace Road	132.1	132.1	132.1	132.1	122.6	135.2	122.6	126.4	-4.3%
17 - Edgewater Street	461.5	461.5	461.5	461.5	446.0	493.1	445.8	460.2	-0.3%
18 - 12th / Liberty	338.4	339.0	338.6	338.7	302.3	334.2	302.3	311.9	-7.9%
19 - Broadway / River Road	656.3	656.7	656.0	656.3	639.6	706.9	639.1	659.7	0.5%
21 - South Commercial	702.4	702.4	702.7	702.5	696.0	768.3	696.0	717.8	2.2%
22 - Library Loop	59.3	59.3	59.3	59.3	0.0	0.0	0.0	0.0	-100.0%
23 - Lansing / Hawthorne	191.7	191.7	191.7	191.7	191.7	211.8	191.7	197.8	3.2%
26 - Glen Creek / Orchard Heights	76.5	76.5	76.5	76.5	76.5	84.6	76.5	78.9	3.2%
27 - Glen Creek / Eola	113.8	113.8	113.8	113.8	113.8	125.8	113.8	117.4	3.2%
<i>Total</i>	<i>8,321.5</i>	<i>8,321.0</i>	<i>8,321.6</i>	<i>8,321.4</i>	<i>7,934.1</i>	<i>8,767.5</i>	<i>7,929.0</i>	<i>8,183.7</i>	<i>-1.7%</i>
LOCAL COMMUTER EXPRESS ROUTES									
1X - Wilsonville / Salem Express	383.4	383.5	383.5	383.5	383.1	423.4	383.1	395.3	3.1%
QUALIFIED HUMAN SERVICE ORGANIZATION ROUTES									
9192 - Garten / Rockwest	14.4	14.4	14.4	14.4	0.0	0.0	0.0	0.0	-100.0%
<i>Cherriots Local Total</i>	<i>8,719.3</i>	<i>8,718.9</i>	<i>8,719.4</i>	<i>8,719.2</i>	<i>8,317.2</i>	<i>9,190.9</i>	<i>8,312.1</i>	<i>8,578.9</i>	<i>-1.6%</i>
REGIONAL EXPRESS ROUTES									
10X - Woodburn / Salem Express	351.0	352.5	349.6	351.0	352.1	353.9	350.8	352.2	0.3%
20X - N. Marion Co. / Salem Express	286.3	296.0	296.7	292.7	291.0	298.7	297.1	295.5	0.9%
30X - Santiam / Salem Express	264.0	264.6	263.2	263.9	216.9	266.8	263.2	248.1	-6.0%
40X - Polk County / Salem Express	388.7	395.1	395.0	392.7	402.6	403.7	402.5	402.9	2.6%
50X - Dallas / Salem Express	130.6	131.3	130.9	130.9	133.5	131.7	134.1	133.2	1.7%
<i>Cherriots Regional Express Monthly Total</i>	<i>1,420.6</i>	<i>1,439.4</i>	<i>1,435.5</i>	<i>1,431.3</i>	<i>1,396.2</i>	<i>1,454.8</i>	<i>1,447.6</i>	<i>1,431.8</i>	<i>0.0%</i>
REGIONAL FLEX ROUTE									
Polk County Flex	144.1	136.5	127.2	136.2	26.2	23.9	3.6	17.7	-87.0%
SHOP AND RIDE									
Dial-a-Ride	124.8	148.1	125.9	131.4	121.0	121.9	90.2	109.8	-16.4%
Shopper Shuttle	28.5	33.7	28.3	29.8	0.0	0.0	0.0	0.0	-100.0%
<i>Cherriots Shop and Ride Total</i>	<i>153.3</i>	<i>181.8</i>	<i>154.2</i>	<i>161.2</i>	<i>121.0</i>	<i>121.9</i>	<i>90.2</i>	<i>109.8</i>	<i>-31.9%</i>
LIFT									
ADA	1,421.7	1,381.5	1,352.3	1,386.4	1,187.0	1,161.8	1,074.0	1,140.0	-17.8%
DD53	1,644.4	1,583.1	1,540.8	1,591.4	308.8	88.1	68.5	158.3	-90.1%
<i>Cherriots LIFT Total</i>	<i>3,066.2</i>	<i>2,964.5</i>	<i>2,893.0</i>	<i>2,977.8</i>	<i>1,495.9</i>	<i>1,249.9</i>	<i>1,142.4</i>	<i>1,298.3</i>	<i>-56.4%</i>

Table 5. Total Boardings

Route	FY20 Q2				FY21 Q2				Percent Change
	Oct 2019	Nov 2019	Dec 2019	Total	Oct 2020	Nov 2020	Dec 2020	Total	
(Service Days)	23	19	21	63	22	19	22	63	
LOCAL BUS SERVICE									
2 - Market / Brown	31,923	24,784	22,709	79,416	12,757	10,252	11,567	34,576	-56.5%
3 - Portland Road	16,357	13,404	13,002	42,763	6,816	5,446	6,135	18,397	-57.0%
4 - State Street	17,183	13,235	14,306	44,724	6,927	5,650	6,446	19,023	-57.5%
5 - Center Street	27,619	22,165	22,582	72,366	11,934	9,372	10,384	31,690	-56.2%
6 - Fairview Industrial	4,993	3,706	3,814	12,513	2,045	1,746	1,991	5,782	-53.8%
7 - Mission Street	6,498	5,254	5,358	17,110	4,119	3,124	3,549	10,792	-36.9%
8 - 12th / Liberty	11,024	8,956	8,694	28,674	4,451	3,609	4,004	12,064	-57.9%
9 - Cherry / River Road	11,525	8,789	9,329	29,643	5,893	5,023	5,625	16,541	-44.2%
11 - Lancaster / Verda	54,091	43,720	41,942	139,753	26,406	20,115	23,740	70,261	-49.7%
12 - Hayesville Drive	2,209	1,797	1,817	5,823	988	723	800	2,511	-56.9%
13 - Silverton Road	14,493	11,656	11,202	37,351	4,653	3,959	4,687	13,299	-64.4%
14 - Windsor Island Road	2,909	2,475	2,407	7,791	1,184	1,060	1,026	3,270	-58.0%
16 - Wallace Road	3,567	3,029	3,023	9,619	1,614	1,306	1,587	4,507	-53.1%
17 - Edgewater Street	16,382	13,285	13,662	43,329	7,824	7,149	8,057	23,030	-46.8%
18 - 12th / Liberty	10,512	8,157	8,376	27,045	4,355	3,495	3,650	11,500	-57.5%
19 - Broadway / River Road	34,678	27,975	28,669	91,322	17,657	14,849	16,928	49,434	-45.9%
21 - South Commercial	32,597	26,829	28,057	87,483	16,389	13,540	15,230	45,159	-48.4%
22 - Library Loop	1,360	1,036	1,118	3,514	0	0	0	0	-100.0%
23 - Lansing / Hawthorne	3,518	2,946	2,759	9,223	1,189	1,033	1,075	3,297	-64.3%
26 - Glen Creek / Orchard Heights	996	684	682	2,362	235	153	169	557	-76.4%
27 - Glen Creek / Eola	1,087	1,015	1,096	3,198	341	315	314	970	-69.7%
<i>Total</i>	<i>305,521</i>	<i>244,897</i>	<i>244,604</i>	<i>795,022</i>	<i>137,777</i>	<i>111,919</i>	<i>126,964</i>	<i>376,660</i>	<i>-52.6%</i>
LOCAL COMMUTER EXPRESS ROUTES									
1X - Wilsonville / Salem Express	2,967	2,363	2,349	7,679	677	513	569	1,759	-77.1%
QUALIFIED HUMAN SERVICE ORGANIZATION ROUTES									
9192 - Garten / Rockwest	617	378	445	1,440	0	0	0	0	N/A
<i>Cherriots Local Total</i>	<i>309,105</i>	<i>247,638</i>	<i>247,398</i>	<i>804,141</i>	<i>138,454</i>	<i>112,432</i>	<i>127,533</i>	<i>378,419</i>	<i>-52.9%</i>
REGIONAL EXPRESS ROUTES									
10X - Woodburn / Salem Express	1,397	1,124	1,040	3,561	790	615	631	2,036	-42.8%
20X - N. Marion Co. / Salem Express	1,334	1,218	1,080	3,632	583	496	565	1,644	-54.7%
30X - Santiam / Salem Express	1,285	1,053	1,106	3,444	597	606	691	1,894	-45.0%
40X - Polk County / Salem Express	5,146	4,258	3,627	13,031	2,433	1,787	1,952	6,172	-52.6%
50X - Dallas / Salem Express	544	497	553	1,594	355	220	246	821	-48.5%
<i>Cherriots Regional Express Monthly Total</i>	<i>9,706</i>	<i>8,150</i>	<i>7,406</i>	<i>25,262</i>	<i>4,758</i>	<i>3,724</i>	<i>4,085</i>	<i>12,567</i>	<i>-50.3%</i>
REGIONAL FLEX ROUTE									
Polk County Flex	630	415	392	1,437	93	81	24	198	-86.2%
SHOP AND RIDE									
Dial-a-Ride	353	289	325	967	380	262	295	937	-3.1%
Shopper Shuttle	232	212	214	658	0	0	0	0	-100.0%
<i>Cherriots Shop and Ride Total</i>	<i>585</i>	<i>501</i>	<i>539</i>	<i>1,625</i>	<i>380</i>	<i>262</i>	<i>295</i>	<i>937</i>	<i>-42.3%</i>
LIFT									
ADA	6,323	4,934	5,198	16,455	3,784	2,999	3,193	9,976	-39.4%
DD53	6,407	4,883	5,262	16,552	792	155	144	1,091	-93.4%
<i>Cherriots LIFT Total</i>	<i>12,730</i>	<i>9,817</i>	<i>10,460</i>	<i>33,007</i>	<i>4,576</i>	<i>3,154</i>	<i>3,337</i>	<i>11,067</i>	<i>-66.5%</i>

Table 6. Average Boardings / Day

Route	FY20 Q2				FY21 Q2				Percent Change
	Oct 2019	Nov 2019	Dec 2019	Total	Oct 2020	Nov 2020	Dec 2020	Total	
(Service Days)	23	19	21	63	22	19	22	63	
LOCAL BUS SERVICE									
2 - Market / Brown	1,388.0	1,304.4	1,081.4	1,260.6	579.9	539.6	525.8	548.8	-56.5%
3 - Portland Road	711.2	705.5	619.1	678.8	309.8	286.6	278.9	292.0	-57.0%
4 - State Street	747.1	696.6	681.2	709.9	314.9	297.4	293.0	302.0	-57.5%
5 - Center Street	1,200.8	1,166.6	1,075.3	1,148.7	542.5	493.3	472.0	503.0	-56.2%
6 - Fairview Industrial	217.1	195.1	181.6	198.6	93.0	91.9	90.5	91.8	-53.8%
7 - Mission Street	282.5	276.5	255.1	271.6	187.2	164.4	161.3	171.3	-36.9%
8 - 12th / Liberty	479.3	471.4	414.0	455.1	202.3	189.9	182.0	191.5	-57.9%
9 - Cherry / River Road	501.1	462.6	444.2	470.5	267.9	264.4	255.7	262.6	-44.2%
11 - Lancaster / Verda	2,351.8	2,301.1	1,997.2	2,218.3	1,200.3	1,058.7	1,079.1	1,115.3	-49.7%
12 - Hayesville Drive	96.0	94.6	86.5	92.4	44.9	38.1	36.4	39.9	-56.9%
13 - Silverton Road	630.1	613.5	533.4	592.9	211.5	208.4	213.0	211.1	-64.4%
14 - Windsor Island Road	126.5	130.3	114.6	123.7	53.8	55.8	46.6	51.9	-58.0%
16 - Wallace Road	155.1	159.4	144.0	152.7	73.4	68.7	72.1	71.5	-53.1%
17 - Edgewater Street	712.3	699.2	650.6	687.8	355.6	376.3	366.2	365.6	-46.8%
18 - 12th / Liberty	457.0	429.3	398.9	429.3	198.0	183.9	165.9	182.5	-57.5%
19 - Broadway / River Road	1,507.7	1,472.4	1,365.2	1,449.6	802.6	781.5	769.5	784.7	-45.9%
21 - South Commercial	1,417.3	1,412.1	1,336.0	1,388.6	745.0	712.6	692.3	716.8	-48.4%
22 - Library Loop	59.1	54.5	53.2	55.8	0.0	0.0	0.0	0.0	-100.0%
23 - Lansing / Hawthorne	153.0	155.1	131.4	146.4	54.0	54.4	48.9	52.3	-64.3%
26 - Glen Creek / Orchard Heights	43.3	36.0	32.5	37.5	10.7	8.1	7.7	8.8	-76.4%
27 - Glen Creek / Eola	47.3	53.4	52.2	50.8	15.5	16.6	14.3	15.4	-69.7%
<i>Total</i>	<i>13,283.5</i>	<i>12,889.3</i>	<i>11,647.8</i>	<i>12,619.4</i>	<i>6,262.6</i>	<i>5,890.5</i>	<i>5,771.1</i>	<i>5,978.7</i>	<i>-52.6%</i>
LOCAL COMMUTER EXPRESS ROUTES									
1X - Wilsonville / Salem Express	129.0	124.4	111.9	121.9	30.8	27.0	25.9	27.9	-77.1%
QUALIFIED HUMAN SERVICE ORGANIZATION ROUTES									
9192 - Garten / Rockwest	26.8	19.9	21.2	22.9	0.0	0.0	0.0	0.0	-100.0%
<i>Cherriots Local Total</i>	<i>13,439.3</i>	<i>13,033.6</i>	<i>11,780.9</i>	<i>12,764.1</i>	<i>6,293.4</i>	<i>5,917.5</i>	<i>5,797.0</i>	<i>6,006.7</i>	<i>-52.9%</i>
REGIONAL EXPRESS ROUTES									
10X - Woodburn / Salem Express	60.7	59.2	49.5	56.5	35.9	32.4	28.7	32.3	-42.8%
20X - N. Marion Co. / Salem Express	58.0	64.1	51.4	57.7	26.5	26.1	25.7	26.1	-54.7%
30X - Santiam / Salem Express	55.9	55.4	52.7	54.7	27.1	31.9	31.4	30.1	-45.0%
40X - Polk County / Salem Express	223.7	224.1	172.7	206.8	110.6	94.1	88.7	98.0	-52.6%
50X - Dallas / Salem Express	23.7	26.2	26.3	25.3	16.1	11.6	11.2	13.0	-48.5%
<i>Cherriots Regional Express Monthly Total</i>	<i>422.0</i>	<i>428.9</i>	<i>352.7</i>	<i>401.0</i>	<i>216.3</i>	<i>196.0</i>	<i>185.7</i>	<i>199.5</i>	<i>-50.3%</i>
REGIONAL FLEX ROUTE									
Polk County Flex	27.4	21.8	18.7	22.8	4.2	4.3	1.1	3.1	-86.2%
SHOP AND RIDE									
Dial-a-Ride	15.3	18.1	15.5	16.1	17.3	17.5	13.4	15.9	-1.5%
Shopper Shuttle	10.1	13.3	10.2	11.0	0.0	0.0	0.0	0.0	-100.0%
<i>Cherriots Shop and Ride Total</i>	<i>25.4</i>	<i>31.3</i>	<i>25.7</i>	<i>27.1</i>	<i>17.3</i>	<i>17.5</i>	<i>13.4</i>	<i>15.9</i>	<i>-41.4%</i>
LIFT									
ADA	274.9	259.7	247.5	261.2	172.0	157.8	145.1	158.3	-39.4%
DD53	278.6	257.0	250.6	262.7	36.0	8.2	6.5	17.3	-93.4%
<i>Cherriots LIFT Total</i>	<i>553.5</i>	<i>516.7</i>	<i>498.1</i>	<i>523.9</i>	<i>208.0</i>	<i>166.0</i>	<i>151.7</i>	<i>175.7</i>	<i>-66.5%</i>

Table 7. Average Boardings / Revenue Hour

Route	FY20 Q2				FY21 Q2				Percent Change
	Oct 2019	Nov 2019	Dec 2019	Total	Oct 2020	Nov 2020	Dec 2020	Total	
(Service Days)	23	19	21	63	22	19	22	63	
LOCAL BUS SERVICE									
2 - Market / Brown	22.7	21.3	17.7	20.6	10.1	8.5	9.1	9.2	-55.3%
3 - Portland Road	22.3	22.2	19.4	21.3	10.3	8.6	9.3	9.4	-55.7%
4 - State Street	22.8	21.2	20.8	21.7	10.2	8.7	9.5	9.5	-56.1%
5 - Center Street	20.6	20.0	18.5	19.7	9.6	7.9	8.4	8.7	-56.0%
6 - Fairview Industrial	9.6	8.6	8.0	8.8	4.1	3.7	4.0	4.0	-54.9%
7 - Mission Street	11.7	11.4	10.5	11.2	8.3	6.6	7.2	7.4	-34.0%
8 - 12th / Liberty	18.5	19.5	17.1	17.5	9.2	7.8	8.3	8.5	-51.8%
9 - Cherry / River Road	16.3	15.0	14.5	15.3	8.7	7.8	8.3	8.3	-45.8%
11 - Lancaster / Verda	21.6	21.1	18.3	20.4	11.7	9.4	10.6	10.6	-48.0%
12 - Hayesville Drive	6.5	6.4	5.9	6.3	3.0	2.3	2.5	2.6	-58.2%
13 - Silverton Road	30.6	29.8	25.9	28.8	7.1	6.4	7.2	6.9	-76.1%
14 - Windsor Island Road	8.2	8.5	7.5	8.0	3.5	3.3	3.1	3.3	-59.0%
16 - Wallace Road	15.4	15.9	14.3	15.2	7.7	6.6	7.6	7.3	-51.9%
17 - Edgewater Street	13.9	13.6	12.7	13.4	7.2	6.9	7.4	7.2	-46.3%
18 - 12th / Liberty	18.0	16.9	15.7	16.9	8.8	7.4	7.4	7.9	-53.3%
19 - Broadway / River Road	25.2	24.6	22.8	24.2	13.7	12.1	13.2	13.0	-46.3%
21 - South Commercial	24.8	24.7	23.4	24.3	13.3	11.6	12.4	12.5	-48.8%
22 - Library Loop	5.1	4.7	4.6	4.8	0.0	0.0	0.0	0.0	-100.0%
23 - Lansing / Hawthorne	10.3	10.4	8.8	10.4	3.6	3.3	3.3	3.4	-67.3%
26 - Glen Creek / Orchard Heights	5.5	4.6	4.2	4.8	1.4	0.9	1.0	1.1	-77.1%
27 - Glen Creek / Eola	5.7	6.4	6.2	6.1	1.9	1.8	1.7	1.8	-70.6%
<i>Total</i>	19.1	18.6	16.8	18.2	9.5	8.1	8.7	8.8	-51.8%
LOCAL COMMUTER EXPRESS ROUTES									
1X - Wilsonville / Salem Express	10.8	10.5	9.4	10.2	2.6	2.1	2.2	2.3	-77.8%
QUALIFIED HUMAN SERVICE ORGANIZATION ROUTES									
9192 - Garten / Rockwest	24.7	18.0	19.3	20.9	0.0	0.0	0.0	0.0	-100.0%
<i>Cherriots Local Total</i>	19.0	18.4	16.7	18.1	9.4	8.0	8.6	8.7	-52.1%
REGIONAL EXPRESS ROUTES									
10X - Woodburn / Salem Express	3.6	3.5	2.9	3.3	2.1	1.9	1.6	1.9	-44.4%
20X - N. Marion Co. / Salem Express	4.5	4.7	3.8	4.3	1.9	1.9	1.9	1.9	-55.1%
30X - Santiam / Salem Express	4.7	4.6	4.3	4.5	2.4	2.6	2.5	2.5	-44.9%
40X - Polk County / Salem Express	12.1	12.2	9.3	11.2	5.9	5.0	4.8	5.2	-53.3%
50X - Dallas / Salem Express	4.2	4.7	4.6	4.5	2.8	2.0	1.9	2.2	-49.9%
<i>Cherriots Regional Express Monthly Total</i>	6.4	6.4	5.3	6.0	3.2	2.9	2.7	3.0	-51.0%
REGIONAL FLEX ROUTE									
Polk County Flex	2.3	1.8	1.6	1.9	2.0	2.2	4.0	2.2	13.8%
SHOP AND RIDE									
Dial-a-Ride	1.5	1.4	1.5	1.5	1.5	1.4	1.5	1.4	-1.3%
Shopper Shuttle	2.0	2.2	2.0	2.1	0.0	0.0	0.0	0.0	-100.0%
<i>Cherriots Shop and Ride Total</i>	1.6	1.7	1.6	1.7	0.0	0.0	1.5	1.4	-13.0%
LIFT									
ADA	2.3	2.3	2.2	2.3	1.7	1.5	1.5	1.6	-31.2%
DD53	2.1	2.0	2.0	2.0	1.5	1.4	1.5	1.5	-26.5%
<i>Cherriots LIFT Total</i>	2.2	2.1	2.1	2.1	1.6	1.5	1.5	1.6	-27.3%

Table 8. Year-To-Date Total Revenue Hours, Revenue Miles, and Boardings

	Revenue Hours			Percent Change	Revenue Miles			Percent Change	Boardings		
	FY20	FY21			FY20	FY21			FY20	FY21	
LOCAL BUS SERVICE											
2 - Market / Brown	7,454	7,015	-5.9%	88,944	86,938	-2.3%	148,751	64,820	-56.4%		
3 - Portland Road	3,954	2,961	-25.1%	46,515	34,572	-25.7%	84,672	30,194	-64.3%		
4 - State Street	4,086	3,038	-25.6%	40,139	29,781	-25.8%	86,651	32,856	-62.1%		
5 - Center Street	7,331	6,762	-7.8%	83,554	76,918	-7.9%	140,025	61,025	-56.4%		
6 - Fairview Industrial	2,868	2,829	-1.4%	43,002	42,282	-1.7%	25,540	11,970	-53.1%		
7 - Mission Street	2,899	2,416	-16.7%	27,610	25,365	-8.1%	33,374	21,276	-36.2%		
8 - 12th / Liberty	3,157	2,818	-10.7%	41,789	37,842	-9.4%	55,078	22,688	-58.8%		
9 - Cherry / River Road	3,900	3,919	0.5%	57,622	57,759	0.2%	60,102	30,967	-48.5%		
11 - Lancaster / Verda	13,514	12,540	-7.2%	180,378	164,899	-8.6%	268,138	131,273	-51.0%		
12 - Hayesville Drive	1,877	1,852	-1.3%	24,990	25,411	1.7%	11,501	5,039	-56.2%		
13 - Silverton Road	2,556	2,867	12.2%	36,406	26,514	-27.2%	71,904	25,538	-64.5%		
14 - Windsor Island Road	1,951	1,918	-1.7%	28,776	28,427	-1.2%	14,458	6,636	-54.1%		
16 - Wallace Road	1,279	1,177	-8.0%	16,860	15,392	-8.7%	18,344	8,549	-53.4%		
17 - Edgewater Street	6,462	5,130	-20.6%	58,288	44,034	-24.5%	86,840	40,191	-53.7%		
18 - 12th / Liberty	3,126	2,863	-8.4%	41,916	38,515	-8.1%	51,868	22,091	-57.4%		
19 - Broadway / River Road	7,523	7,207	-4.2%	85,364	78,670	-7.8%	178,701	90,819	-49.2%		
21 - South Commercial	7,164	6,748	-5.8%	89,281	83,855	-6.1%	173,449	84,191	-51.5%		
22 - Library Loop	1,456	0	-100.0%	7,526	0	-100.0%	8,341	0	-100.0%		
23 - Lansing / Hawthorne	1,893	1,930	2.0%	24,342	24,815	1.9%	18,215	6,955	-61.8%		
26 - Glen Creek / Orchard Heights	993	980	-1.3%	9,724	9,610	-1.2%	3,921	1,381	-64.8%		
27 - Glen Creek / Eola	1,062	999	-5.9%	14,454	13,497	-6.6%	6,122	1,978	-67.7%		
<i>Total</i>	<i>86,505</i>	<i>77,969</i>	<i>-9.9%</i>	<i>1,047,480</i>	<i>945,096</i>	<i>-9.8%</i>	<i>1,545,995</i>	<i>700,437</i>	<i>-54.7%</i>		
LOCAL COMMUTER EXPRESS ROUTES											
1X - Wilsonville / Salem Express	1,420	1,303	-8.2%	45,903	41,884	-8.8%	15,277	3,144	-79.4%		
QUALIFIED HUMAN SERVICES ROUTES											
9192 - Garten / Rockwest	139	0	-100.0%	1,643	0	-100.0%	2,162	0	-100.0%		
<i>Cherriots Local Y-T-D Total</i>	<i>88,064</i>	<i>79,272</i>	<i>-10.0%</i>	<i>1,095,026</i>	<i>986,980</i>	<i>-9.9%</i>	<i>1,563,434</i>	<i>703,581</i>	<i>-55.0%</i>		
REGIONAL EXPRESS ROUTES											
10X - Woodburn / Salem Express	1,972	2,134	8.2%	40,460	43,176	6.7%	6,823	4,052	-40.6%		
20X - N. Marion Co. / Salem Express	1,716	3,271	90.6%	37,262	36,324	-2.5%	6,257	3,072	-50.9%		
30X - Santiam / Salem Express	1,520	3,016	98.4%	33,385	30,913	-7.4%	7,064	3,693	-47.7%		
40X - Polk County / Salem Express	2,142	4,268	99.3%	45,742	50,767	11.0%	23,875	12,419	-48.0%		
50X - Dallas / Salem Express	593	1,299	119.1%	13,936	17,036	22.2%	2,962	1,668	-43.7%		
<i>Cherriots Regional Express Y-T-D Total</i>	<i>7,943</i>	<i>13,988</i>	<i>76.1%</i>	<i>170,785</i>	<i>178,216</i>	<i>4.4%</i>	<i>46,981</i>	<i>24,904</i>	<i>-47.0%</i>		
REGIONAL FLEX ROUTE											
Polk County Flex	1,458	90	-93.8%	18,269	1,112	-93.9%	3,268	198	-93.9%		
<i>Cherriots Regional Y-T-D Total</i>	<i>9,401</i>	<i>14,078</i>	<i>49.8%</i>	<i>189,054</i>	<i>179,328</i>	<i>-5.1%</i>	<i>50,249</i>	<i>25,102</i>	<i>-50.0%</i>		
SHOP AND RIDE											
Dial-a-Ride	1,318	1,387	5.2%	16,110	13,651	-15.3%	1,951	1,871	-4.1%		
Shopper Shuttle	636	0	-100.0%	4,264	0	-100.0%	1,337	0	-100.0%		
<i>Cherriots Shop and Ride Y-T-D Total</i>	<i>1,954</i>	<i>1,387</i>	<i>-29.0%</i>	<i>20,374</i>	<i>13,651</i>	<i>-33.0%</i>	<i>3,288</i>	<i>1,871</i>	<i>-43.1%</i>		
LIFT											
ADA	14,159	12,175	-14.0%	171,936	136,779	-20.4%	32,951	19,270	-41.5%		
DD53	16,799	1,589	-90.5%	206,795	21,145	-89.8%	34,360	2,331	-93.2%		
<i>Cherriots LIFT Y-T-D Total</i>	<i>30,958</i>	<i>13,764</i>	<i>-55.5%</i>	<i>378,731</i>	<i>157,924</i>	<i>-58.3%</i>	<i>67,311</i>	<i>21,601</i>	<i>-67.9%</i>		

Table 9. Fare Type and Category Usage

Cherriots Local												
Fare Types	<i>Fare Categories</i>											
	<i>Full Fare</i>			<i>Reduced Fare</i>			<i>Youth Fare</i>			<i>Free</i>		
	Q2 2020	Q2 2021	% Change	Q2 2020	Q2 2021	% Change	Q2 2020	Q2 2021	% Change	Q2 2020	Q2 2021	% Change
30 Day Pass	133,659	0	-100.0%	174,171	0	-100.0%	56,951	0	-100.0%	-	-	-
Day Pass	109,607	0	-100.0%	103,816	0	-100.0%	108,021	0	-100.0%	-	-	-
Cash	26,838	0	-100.0%	6,173	0	-100.0%	12,988	0	-100.0%	-	-	-
Free	-	-	-	-	-	-	-	-	-	28,660	378,419	1220.4%
Cherriots Regional												
Fare Types	<i>Fare Categories</i>											
	<i>Full Fare</i>			<i>Reduced Fare</i>			<i>Youth Fare</i>			<i>Free</i>		
	Q2 2020	Q2 2021	% Change	Q2 2020	Q2 2021	% Change	Q2 2020	Q2 2021	% Change	Q2 2020	Q2 2021	% Change
Monthly Pass	1,006	0	-100.0%	635	0	-100.0%	128	0	-100.0%	-	-	-
Day Pass	6,482	0	-100.0%	5,379	0	-100.0%	1,612	0	-100.0%	-	-	-
Cash	7,386	0	-100.0%	1,771	0	-100.0%	1,698	0	-100.0%	-	-	-
Free	-	-	-	-	-	-	-	-	-	602	12,672	2005.0%

Table 10. Saturday Total Revenue Hours

Route	FY20 Q2				FY21 Q2			
	Oct 2019	Nov 2019	Dec 2019	Total	Oct 2020	Nov 2020	Dec 2020	Total
(Service Days)	4	5	4	13	5	4	4	13
LOCAL BUS SERVICE								
2 - Market / Brown	109	136	109	354	136	109	109	354
3 - Portland Road	60	75	60	195	75	60	60	195
4 - State Street	61	77	61	199	77	61	61	199
5 - Center Street	110	137	110	357	138	110	110	358
6 - Mission / Fairview Industrial	84	105	84	273	105	84	84	273
7 - Mission / Hawthorne	58	73	58	189	73	58	58	189
8 - 12th / Liberty via Red Leaf	87	109	87	283	109	87	87	283
9 - Cherry / River Road	62	77	62	201	77	62	62	201
11 - Lancaster / Verda	221	277	222	720	277	222	222	721
13 - Silverton Road	54	68	54	176	68	54	54	176
16 - Wallace Road	35	43	35	113	43	35	35	113
17 - Edgewater / Gerth	108	135	108	351	135	108	108	351
18 - 12th / Liberty via Lone Oak	87	109	87	283	109	87	87	283
19 - Broadway / River Road	107	133	107	347	133	107	107	347
21 - South Commercial	108	134	108	350	134	108	107	349
<i>Cherriots Local Monthly Total</i>	<i>1,351</i>	<i>1,688</i>	<i>1,352</i>	<i>4,391</i>	<i>1,689</i>	<i>1,352</i>	<i>1,351</i>	<i>4,392</i>
REGIONAL EXPRESS ROUTES								
10X - Woodburn / Salem Express	28	37	29	94	37	29	29	95
20X - N. Marion Co. / Salem Express	35	44	35	114	43	36	35	114
30X - Santiam / Salem Express	28	35	28	91	35	28	28	91
40X - Polk County / Salem Express	37	46	37	120	41	37	37	115
<i>Cherriots Regional Express Monthly Total</i>	<i>128</i>	<i>162</i>	<i>129</i>	<i>419</i>	<i>156</i>	<i>130</i>	<i>129</i>	<i>415</i>
LIFT								
ADA	176	183	169	528	277	214	199	690
DD53	9	22	19	50	17	12	10	39
<i>Cherriots LIFT Total</i>	<i>185</i>	<i>205</i>	<i>188</i>	<i>578</i>	<i>294</i>	<i>226</i>	<i>209</i>	<i>729</i>

Table 11. Saturday Average Revenue Hours / Day

Route	FY20 Q2				FY21 Q2				Percent Change
	Oct 2019	Nov 2019	Dec 2019	Total	Oct 2020	Nov 2020	Dec 2020	Total	
(Service Days)	4	5	4	13	5	4	4	13	
LOCAL BUS SERVICE									
2 - Market / Brown	27.3	27.2	27.3	27.2	27.2	27.3	27.3	27.2	0.0%
3 - Portland Road	15.0	15.0	15.0	15.0	15.0	15.0	15.0	15.0	0.0%
4 - State Street	15.3	15.4	15.3	15.3	15.4	15.3	15.3	15.3	0.0%
5 - Center Street	27.5	27.4	27.5	27.5	27.6	27.5	27.5	27.5	0.3%
6 - Mission / Fairview Industrial	21.0	21.0	21.0	21.0	21.0	21.0	21.0	21.0	0.0%
7 - Mission / Hawthorne	14.5	14.6	14.5	14.5	14.6	14.5	14.5	14.5	0.0%
8 - 12th / Liberty via Red Leaf	21.8	21.8	21.8	21.8	21.8	21.8	21.8	21.8	0.0%
9 - Cherry / River Road	15.5	15.4	15.5	15.5	15.4	15.5	15.5	15.5	0.0%
11 - Lancaster / Verda	55.3	55.4	55.5	55.4	55.4	55.5	55.5	55.5	0.1%
13 - Silverton Road	13.5	13.6	13.5	13.5	13.6	13.5	13.5	13.5	0.0%
16 - Wallace Road	8.8	8.6	8.8	8.7	8.6	8.8	8.8	8.7	0.0%
17 - Edgewater / Gerth	27.0	27.0	27.0	27.0	27.0	27.0	27.0	27.0	0.0%
18 - 12th / Liberty via Lone Oak	21.8	21.8	21.8	21.8	21.8	21.8	21.8	21.8	0.0%
19 - Broadway / River Road	26.8	26.6	26.8	26.7	26.6	26.8	26.8	26.7	0.0%
21 - South Commercial	27.0	26.8	27.0	26.9	26.8	27.0	26.8	26.8	-0.3%
<i>Cherriots Local Monthly Total</i>	337.8	337.6	338.0	337.8	337.8	338.0	337.8	337.8	0.0%
REGIONAL EXPRESS ROUTES									
10X - Woodburn / Salem Express	7.0	7.4	7.3	7.2	7.4	7.3	7.3	7.3	1.1%
20X - N. Marion Co. / Salem Express	8.8	8.8	8.8	8.8	8.6	9.0	8.8	8.8	0.0%
30X - Santiam / Salem Express	7.0	7.0	7.0	7.0	7.0	7.0	7.0	7.0	0.0%
40X - Polk County / Salem Express	9.3	9.2	9.3	9.2	8.2	9.3	9.3	8.8	-4.2%
<i>Cherriots Regional Express Monthly Total</i>	32.0	32.4	32.3	32.2	31.2	32.5	32.3	31.9	-1.0%
LIFT									
ADA	44.0	36.6	42.3	40.6	55.4	53.5	49.8	53.1	30.7%
DD53	2.3	4.4	4.8	3.8	3.4	3.0	2.5	3.0	-22.0%
<i>Cherriots LIFT Total</i>	46.3	41.0	47.0	44.5	58.8	56.5	52.3	56.1	26.1%

Table 12. Saturday Total Revenue Miles

Route	FY20 Q2				FY21 Q2			
	Oct 2019	Nov 2019	Dec 2019	Total	Oct 2020	Nov 2020	Dec 2020	Total
(Service Days)	4	5	4	13	5	4	4	13
LOCAL BUS SERVICE								
2 - Market / Brown	1,381	1,726	1,381	4,488	1,808	1,447	1,447	4,702
3 - Portland Road	700	876	700	2,276	876	700	700	2,276
4 - State Street	603	754	603	1,960	754	603	603	1,960
5 - Center Street	1,248	1,560	1,248	4,056	1,560	1,248	1,248	4,056
6 - Mission / Fairview Industrial	1,263	1,578	1,263	4,104	1,578	1,263	1,263	4,104
7 - Mission / Hawthorne	751	938	751	2,440	938	751	751	2,440
8 - 12th / Liberty via Red Leaf	1,165	1,457	1,165	3,787	1,482	1,185	1,185	3,852
9 - Cherry / River Road	906	1,133	906	2,945	1,133	906	906	2,945
11 - Lancaster / Verda	2,814	3,517	2,814	9,145	3,517	2,814	2,814	9,145
13 - Silverton Road	510	637	510	1,657	647	517	517	1,681
16 - Wallace Road	459	574	459	1,492	574	459	459	1,492
17 - Edgewater / Gerth	831	1,038	831	2,700	1,038	831	831	2,700
18 - 12th / Liberty via Lone Oak	1,156	1,445	1,156	3,757	1,461	1,169	1,169	3,799
19 - Broadway / River Road	1,382	1,727	1,382	4,491	1,727	1,382	1,382	4,491
21 - South Commercial	1,330	1,663	1,330	4,323	1,663	1,330	1,330	4,323
<i>Cherriots Local Monthly Total</i>	<i>16,499</i>	<i>20,623</i>	<i>16,499</i>	<i>53,621</i>	<i>20,756</i>	<i>16,605</i>	<i>16,605</i>	<i>53,966</i>
REGIONAL EXPRESS ROUTES								
10X - Woodburn / Salem Express	581	775	651	2,007	747	570	617	1,934
20X - N. Marion Co. / Salem Express	830	1,038	825	2,693	1,010	848	840	2,698
30X - Santiam / Salem Express	684	872	710	2,266	565	713	701	1,979
40X - Polk County / Salem Express	797	998	794	2,589	889	803	794	2,486
<i>Cherriots Regional Express Monthly Total</i>	<i>2,892</i>	<i>3,683</i>	<i>2,980</i>	<i>9,555</i>	<i>3,211</i>	<i>2,934</i>	<i>2,952</i>	<i>9,097</i>
LIFT								
ADA	1,849	1,971	1,960	5,780	3,049	2,456	2,081	7,586
DD53	113	359	287	759	201	166	134	501
<i>Cherriots LIFT Total</i>	<i>1,962</i>	<i>2,330</i>	<i>2,247</i>	<i>6,539</i>	<i>3,250</i>	<i>2,622</i>	<i>2,215</i>	<i>8,087</i>

Table 13. Saturday Average Revenue Miles / Day

Route	FY20 Q2				FY21 Q2				Percent Change
	Oct 2019	Nov 2019	Dec 2019	Total	Oct 2020	Nov 2020	Dec 2020	Total	
(Service Days)	4	5	4	13	5	4	4	13	
LOCAL BUS SERVICE									
2 - Market / Brown	345.3	345.2	345.3	345.2	361.6	361.8	361.8	361.7	4.8%
3 - Portland Road	175.0	175.2	175.0	175.1	175.2	175.0	175.0	175.1	0.0%
4 - State Street	150.8	150.8	150.8	150.8	150.8	150.8	150.8	150.8	0.0%
5 - Center Street	312.0	312.0	312.0	312.0	312.0	312.0	312.0	312.0	0.0%
6 - Mission / Fairview Industrial	315.8	315.6	315.8	315.7	315.6	315.8	315.8	315.7	0.0%
7 - Mission / Hawthorne	187.8	187.6	187.8	187.7	187.6	187.8	187.8	187.7	0.0%
8 - 12th / Liberty via Red Leaf	291.3	291.4	291.3	291.3	296.4	296.3	296.3	296.3	1.7%
9 - Cherry / River Road	226.5	226.6	226.5	226.5	226.6	226.5	226.5	226.5	0.0%
11 - Lancaster / Verda	703.5	703.4	703.5	703.5	703.4	703.5	703.5	703.5	0.0%
13 - Silverton Road	127.5	127.4	127.5	127.5	129.4	129.3	129.3	129.3	1.4%
16 - Wallace Road	114.8	114.8	114.8	114.8	114.8	114.8	114.8	114.8	0.0%
17 - Edgewater / Gerth	207.8	207.6	207.8	207.7	207.6	207.8	207.8	207.7	0.0%
18 - 12th / Liberty via Lone Oak	289.0	289.0	289.0	289.0	292.2	292.3	292.3	292.2	1.1%
19 - Broadway / River Road	345.5	345.4	345.5	345.5	345.4	345.5	345.5	345.5	0.0%
21 - South Commercial	332.5	332.6	332.5	332.5	332.6	332.5	332.5	332.5	0.0%
<i>Cherriots Local Monthly Total</i>	<i>4,124.8</i>	<i>4,124.6</i>	<i>4,124.8</i>	<i>4,124.7</i>	<i>4,151.2</i>	<i>4,151.3</i>	<i>4,151.3</i>	<i>4,151.2</i>	<i>0.6%</i>
REGIONAL EXPRESS ROUTES									
10X - Woodburn / Salem Express	145.3	155.0	162.8	154.4	149.4	142.5	154.3	148.8	-3.6%
20X - N. Marion Co. / Salem Express	207.5	207.6	206.3	207.2	202.0	212.0	210.0	207.5	0.2%
30X - Santiam / Salem Express	171.0	174.4	177.5	174.3	113.0	178.3	175.3	152.2	-12.7%
40X - Polk County / Salem Express	199.3	199.6	198.5	199.2	177.8	200.8	198.5	191.2	-4.0%
<i>Cherriots Regional Express Monthly Total</i>	<i>723.0</i>	<i>736.6</i>	<i>745.0</i>	<i>735.0</i>	<i>642.2</i>	<i>733.5</i>	<i>738.0</i>	<i>699.8</i>	<i>-4.8%</i>
LIFT									
ADA	462.3	394.2	490.0	444.6	609.8	614.0	520.3	583.5	31.2%
DD53	28.3	71.8	71.8	58.4	40.2	41.5	33.5	38.5	-34.0%
<i>Cherriots LIFT Total</i>	<i>490.5</i>	<i>466.0</i>	<i>561.8</i>	<i>503.0</i>	<i>650.0</i>	<i>655.5</i>	<i>553.8</i>	<i>622.1</i>	<i>23.7%</i>

Table 14. Saturday Total Boardings

Route	FY20 Q2				FY21 Q2				Percent Change
	Oct 2019	Nov 2019	Dec 2019	Total	Oct 2020	Nov 2020	Dec 2020	Total	
(Service Days)	4	5	4	13	5	4	4	13	
LOCAL BUS SERVICE									
2 - Market / Brown	2,253	2,772	1,755	6,780	1,956	1,333	1,382	4,671	-31.1%
3 - Portland Road	1,096	1,292	911	3,299	818	558	633	2,009	-39.1%
4 - State Street	1,129	1,463	1,042	3,634	878	738	681	2,297	-36.8%
5 - Center Street	2,230	2,652	1,956	6,838	1,666	1,289	1,345	4,300	-37.1%
6 - Mission / Fairview Industrial	375	388	341	1,104	234	205	170	609	-44.8%
7 - Mission / Hawthorne	538	681	462	1,681	699	439	432	1,570	-6.6%
8 - 12th / Liberty via Red Leaf	998	1,287	776	3,061	784	559	582	1,925	-37.1%
9 - Cherry / River Road	851	1,044	668	2,563	715	517	523	1,755	-31.5%
11 - Lancaster / Verda	5,038	5,233	3,654	13,925	3,997	2,617	2,907	9,521	-31.6%
13 - Silverton Road	971	1,228	943	3,142	668	495	426	1,589	-49.4%
16 - Wallace Road	344	508	316	1,168	298	156	244	698	-40.2%
17 - Edgewater / Gerth	1,234	1,517	1,064	3,815	1,013	759	794	2,566	-32.7%
18 - 12th / Liberty via Lone Oak	831	1,071	756	2,658	746	482	511	1,739	-34.6%
19 - Broadway / River Road	3,027	3,612	2,583	9,222	2,617	2,001	1,900	6,518	-29.3%
21 - South Commercial	2,778	3,384	2,327	8,489	2,259	1,682	1,710	5,651	-33.4%
<i>Cherriots Local Monthly Total</i>	<i>23,693</i>	<i>28,132</i>	<i>19,554</i>	<i>71,379</i>	<i>19,348</i>	<i>13,830</i>	<i>14,240</i>	<i>47,418</i>	<i>-33.6%</i>
REGIONAL EXPRESS ROUTES									
10X - Woodburn / Salem Express	83	96	60	239	73	61	68	202	-15.5%
20X - N. Marion Co. / Salem Express	74	137	85	296	63	57	58	178	-39.9%
30X - Santiam / Salem Express	64	71	39	174	44	40	51	135	-22.4%
40X - Polk County / Salem Express	283	328	298	909	231	143	165	539	-40.7%
<i>Cherriots Regional Express Monthly Total</i>	<i>504</i>	<i>632</i>	<i>482</i>	<i>1,618</i>	<i>411</i>	<i>301</i>	<i>342</i>	<i>1,054</i>	<i>-34.9%</i>
LIFT									
ADA	274	277	289	840	479	346	323	1,148	36.7%
DD53	12	33	29	74	20	17	16	53	-28.4%
<i>Cherriots LIFT Total</i>	<i>286</i>	<i>310</i>	<i>318</i>	<i>914</i>	<i>499</i>	<i>363</i>	<i>339</i>	<i>1,201</i>	<i>31.4%</i>

Table 15. Saturday Average Boardings / Day

Route	FY20 Q2				FY21 Q2				Percent Change
	Oct 2019	Nov 2019	Dec 2019	Total	Oct 2020	Nov 2020	Dec 2020	Total	
(Service Days)	4	5	4	13	5	4	4	13	
LOCAL BUS SERVICE									
2 - Market / Brown	563.3	554.4	438.8	521.5	391.2	333.3	345.5	359.3	-31.1%
3 - Portland Road	274.0	258.4	227.8	253.8	163.6	139.5	158.3	154.5	-39.1%
4 - State Street	282.3	292.6	260.5	279.5	175.6	184.5	170.3	176.7	-36.8%
5 - Center Street	557.5	530.4	489.0	526.0	333.2	322.3	336.3	330.8	-37.1%
6 - Mission / Fairview Industrial	93.8	77.6	85.3	84.9	46.8	51.3	42.5	46.8	-44.8%
7 - Mission / Hawthorne	134.5	136.2	115.5	129.3	139.8	109.8	108.0	120.8	-6.6%
8 - 12th / Liberty via Red Leaf	249.5	257.4	194.0	235.5	156.8	139.8	145.5	148.1	-37.1%
9 - Cherry / River Road	212.8	208.8	167.0	197.2	143.0	129.3	130.8	135.0	-31.5%
11 - Lancaster / Verda	1,259.5	1,046.6	913.5	1,071.2	799.4	654.3	726.8	732.4	-31.6%
13 - Silverton Road	242.8	245.6	235.8	241.7	133.6	123.8	106.5	122.2	-49.4%
16 - Wallace Road	86.0	101.6	79.0	89.8	59.6	39.0	61.0	53.7	-40.2%
17 - Edgewater / Gerth	308.5	303.4	266.0	293.5	202.6	189.8	198.5	197.4	-32.7%
18 - 12th / Liberty via Lone Oak	207.8	214.2	189.0	204.5	149.2	120.5	127.8	133.8	-34.6%
19 - Broadway / River Road	756.8	722.4	645.8	709.4	523.4	500.3	475.0	501.4	-29.3%
21 - South Commercial	694.5	676.8	581.8	653.0	451.8	420.5	427.5	434.7	-33.4%
<i>Cherriots Local Monthly Total</i>	<i>5,923.3</i>	<i>5,626.4</i>	<i>4,888.5</i>	<i>5,490.7</i>	<i>3,869.6</i>	<i>3,457.5</i>	<i>3,560.0</i>	<i>3,647.5</i>	<i>-33.6%</i>
REGIONAL EXPRESS ROUTES									
10X - Woodburn / Salem Express	20.8	19.2	15.0	18.4	14.6	15.3	17.0	15.5	-15.5%
20X - N. Marion Co. / Salem Express	18.5	27.4	21.3	22.8	12.6	14.3	14.5	13.7	-39.9%
30X - Santiam / Salem Express	16.0	14.2	9.8	13.4	8.8	10.0	12.8	10.4	-22.4%
40X - Polk County / Salem Express	70.8	65.6	74.5	69.9	46.2	35.8	41.3	41.5	-40.7%
<i>Cherriots Regional Express Monthly Total</i>	<i>126.0</i>	<i>126.4</i>	<i>120.5</i>	<i>124.5</i>	<i>82.2</i>	<i>75.3</i>	<i>85.5</i>	<i>81.1</i>	<i>-34.9%</i>
LIFT									
ADA	68.5	55.4	72.3	64.6	95.8	86.5	80.8	88.3	36.7%
DD53	3.0	6.6	7.3	5.7	4.0	4.3	4.0	4.1	-28.4%
<i>Cherriots LIFT Total</i>	<i>71.5</i>	<i>62.0</i>	<i>79.5</i>	<i>70.3</i>	<i>99.8</i>	<i>90.8</i>	<i>84.8</i>	<i>92.4</i>	<i>31.4%</i>

Table 16. Saturday Average Boardings / Revenue Hour

Route	FY20 Q2				FY21 Q2				Percent Change
	Oct 2019	Nov 2019	Dec 2019	Total	Oct 2020	Nov 2020	Dec 2020	Total	
(Service Days)	4	5	4	13	5	4	4	13	
LOCAL BUS SERVICE									
2 - Market / Brown	20.7	20.4	16.1	19.2	14.4	12.2	12.7	13.2	-31.1%
3 - Portland Road	18.3	17.2	15.2	16.9	10.9	9.3	10.6	10.3	-39.1%
4 - State Street	18.5	19.0	17.1	18.3	11.4	12.1	11.2	11.5	-36.8%
5 - Center Street	20.3	19.4	17.8	19.2	12.1	11.7	12.2	12.0	-37.3%
6 - Mission / Fairview Industrial	4.5	3.7	4.1	4.0	2.2	2.4	2.0	2.2	-44.8%
7 - Mission / Hawthorne	9.3	9.3	8.0	8.9	9.6	7.6	7.4	8.3	-6.6%
8 - 12th / Liberty via Red Leaf	11.5	17.6	13.4	10.8	7.2	6.4	6.7	6.8	-37.1%
9 - Cherry / River Road	13.7	13.6	10.8	12.8	9.3	8.3	8.4	8.7	-31.5%
11 - Lancaster / Verda	22.8	18.9	16.5	19.3	14.4	11.8	13.1	13.2	-31.7%
13 - Silverton Road	18.0	18.1	17.5	17.9	9.8	9.2	7.9	9.0	-49.4%
16 - Wallace Road	9.8	11.8	9.0	10.3	6.9	4.5	7.0	6.2	-40.2%
17 - Edgewater / Gerth	11.4	11.2	9.9	10.9	7.5	7.0	7.4	7.3	-32.7%
18 - 12th / Liberty via Lone Oak	9.6	9.8	8.7	9.4	6.8	5.5	5.9	6.1	-34.6%
19 - Broadway / River Road	28.3	27.2	24.1	26.6	19.7	18.7	17.8	18.8	-29.3%
21 - South Commercial	25.7	25.3	21.5	24.3	16.9	15.6	16.0	16.2	-33.2%
<i>Cherriots Local Monthly Total</i>	17.5	16.7	14.5	16.3	11.5	10.2	10.5	10.8	-33.6%
REGIONAL EXPRESS ROUTES									
10X - Woodburn / Salem Express	3.0	2.6	2.1	2.5	2.0	2.1	2.3	2.1	-16.4%
20X - N. Marion Co. / Salem Express	2.1	3.1	2.4	2.6	1.5	1.6	1.7	1.6	-39.9%
30X - Santiam / Salem Express	2.3	2.0	1.4	1.9	1.3	1.4	1.8	1.5	-22.4%
40X - Polk County / Salem Express	7.6	7.1	8.1	7.6	5.6	3.9	4.5	4.7	-38.1%
<i>Cherriots Regional Express Monthly Total</i>	3.9	3.9	3.7	3.9	2.6	2.3	2.7	2.5	-34.2%
LIFT									
ADA	1.6	1.5	1.7	1.6	1.7	1.6	1.6	1.7	4.6%
DD53	1.3	1.5	1.5	1.5	1.2	1.4	1.6	1.4	-8.2%
<i>Cherriots LIFT Total</i>	1.5	1.5	1.7	1.6	1.7	1.6	1.6	1.6	4.2%

Table 17. Saturday Year-To-Date Total Revenue Hours, Revenue Miles, and Boardings

Route	Revenue Hours	Revenue Miles	Boardings
	FY21	FY21	FY21
LOCAL BUS SERVICE			
2 - Market / Brown	666	8,831	8,103
3 - Portland Road	372	4,342	3,599
4 - State Street	380	3,740	4,121
5 - Center Street	672	7,625	7,579
6 - Mission / Fairview Industrial	521	7,830	1,222
7 - Mission / Hawthorne	361	4,653	2,871
8 - 12th / Liberty via Red Leaf	535	7,265	3,546
9 - Cherry / River Road	383	5,620	3,296
11 - Lancaster / Verda	1,376	17,467	16,712
13 - Silverton Road	337	3,214	3,124
16 - Wallace Road	215	2,846	1,240
17 - Edgewater / Gerth	660	5,077	4,582
18 - 12th / Liberty via Lone Oak	523	7,013	2,993
19 - Broadway / River Road	663	8,585	11,463
21 - South Commercial	668	8,264	10,070
<i>Cherriots Local Y-T-D Total</i>	8,332	102,372	84,521
REGIONAL EXPRESS ROUTES			
10X - Woodburn / Salem Express	182	3,788	320
20X - N. Marion Co. / Salem Express	215	5,112	292
30X - Santiam / Salem Express	175	3,824	210
40X - Polk County / Salem Express	225	4,864	986
<i>Cherriots Regional Express Y-T-D Total</i>	797	17,588	1,808
LIFT			
ADA	1,274	13,953	2,060
DD53	75	955	109
<i>Cherriots LIFT Y-T-D Total</i>	1,349	14,908	2,169

Table 18. Saturday Fare Type and Category Usage

Cherriots Local												
<i>Fare Categories</i>												
Fare Types	<i>Full Fare</i>			<i>Reduced Fare</i>			<i>Youth Fare</i>			<i>Free</i>		
	Q2 2020	Q2 2021	% Change	Q2 2020	Q2 2021	% Change	Q2 2020	Q2 2021	% Change	Q2 2020	Q2 2021	% Change
30 Day Pass	12,000	0	-100.0%	15,181	0	-100.0%	3,530	0	-100.0%	-	-	-
Day Pass	10,066	0	-100.0%	10,092	0	-100.0%	10,155	0	-100.0%	-	-	-
Cash	2,649	0	-100.0%	516	0	-100.0%	857	0	-100.0%	-	-	-
Free	-	-	-	-	-	-	-	-	-	3,096	47,418	1431.6%
Cherriots Regional												
<i>Fare Categories</i>												
Fare Types	<i>Full Fare</i>			<i>Reduced Fare</i>			<i>Youth Fare</i>			<i>Free</i>		
	Q2 2020	Q2 2021	% Change	Q2 2020	Q2 2021	% Change	Q2 2020	Q2 2021	% Change	Q2 2020	Q2 2021	% Change
Monthly Pass	65	0	-100.0%	44	0	-100.0%	21	0	-100.0%	-	-	-
Day Pass	247	0	-100.0%	94	0	-100.0%	29	0	-100.0%	-	-	-
Cash	731	0	-100.0%	92	0	-100.0%	214	0	-100.0%	-	-	-
Free	-	-	-	-	-	-	-	-	-	81	1,054	1201.2%

Table 19. Rides / Revenue Hour Comparison

LOCAL WEEKDAY				REGIONAL/LOCAL EXPRESS WEEKDAY			DEMAND-RESPONSE		
	Route	FY21 Q1	FY21 Q2		FY21 Q1	FY21 Q2		FY21 Q1	FY21 Q2
1	Corridor Routes	Route 19	12.2	13					
1	Corridor Routes	Route 21	12.5	12.5		Route 40X	5.2	5.2	
1	Corridor Routes	Route 11	10.3	10.6		Route 30X	2.3	2.5	
1	Corridor Routes	Route 4	13.3	9.5		Route 1X	2.6	2.3	
1	Corridor Routes	Route 3	11.7	9.4		Route 50X	2.2	2.2	
1	Corridor Routes	Route 2	9.3	9.2		Route 20X	1.8	1.9	
1	Corridor Routes	Route 5	9.4	8.7		Route 10X	1.9	1.9	
1	Corridor Routes	Route 8	7.6	8.5					
1	Corridor Routes	Route 9	7.5	8.3					
1	Corridor Routes	Route 18	7.5	7.9					
1	Corridor Routes	Route 17	8.9	7.2					
1	Corridor Routes	Route 13	13	6.9					
2	Coverage Routes	Route 7	11	7.4					
2	Coverage Routes	Route 16	7.2	7.3					
2	Coverage Routes	Route 6	4.5	4.0					
2	Coverage Routes	Route 23	3.8	3.4					
2	Coverage Routes	Route 14	3.6	3.3					
2	Coverage Routes	Route 12	2.8	2.6					
2	Coverage Routes	Route 27	2.2	1.8					
2	Coverage Routes	Route 26	1.7	1.1					

LOCAL SATURDAY				
	Route	FY21 Q1	FY21 Q2	
1	Corridor Routes	Route 19	15.6	18.8
1	Corridor Routes	Route 21	13.9	16.2
1	Corridor Routes	Route 11	11	13.2
1	Corridor Routes	Route 2	11	13.2
1	Corridor Routes	Route 5	10.4	12.0
1	Corridor Routes	Route 4	10.1	11.5
1	Corridor Routes	Route 3	9	10.3
1	Corridor Routes	Route 13	9.5	9.0
1	Corridor Routes	Route 9	8.5	8.7
1	Corridor Routes	Route 17	6.5	7.3
1	Corridor Routes	Route 8	6.4	6.8
1	Corridor Routes	Route 18 *	5.2	6.1
2	Coverage Routes	Route 7	7.6	8.3
2	Coverage Routes	Route 16	5.3	6.2
2	Coverage Routes	Route 6	2.5	2.2

REGIONAL EXPRESS SATURDAY			
	FY21 Q1	FY21 Q2	
	Route 40X	4.7	4.1
	Route 10X	2.1	1.4
	Route 20X	1.6	1.1
	Route 30X	2.5	0.9


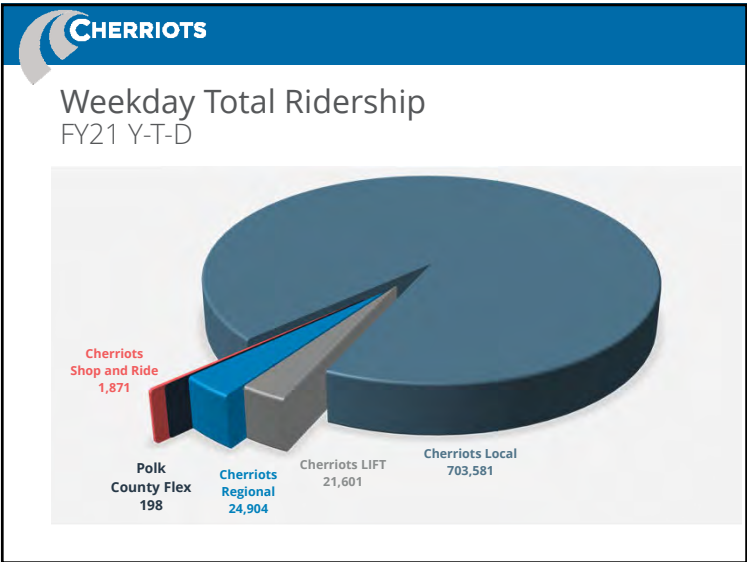
CHERRIOTS LIFT			
	FY21 Q1	FY21 Q2	
	LIFT ADA	1.6	1.7
	LIFT DD53	1.6	1.4

Table 20. Average Bus Stop Activity / Day

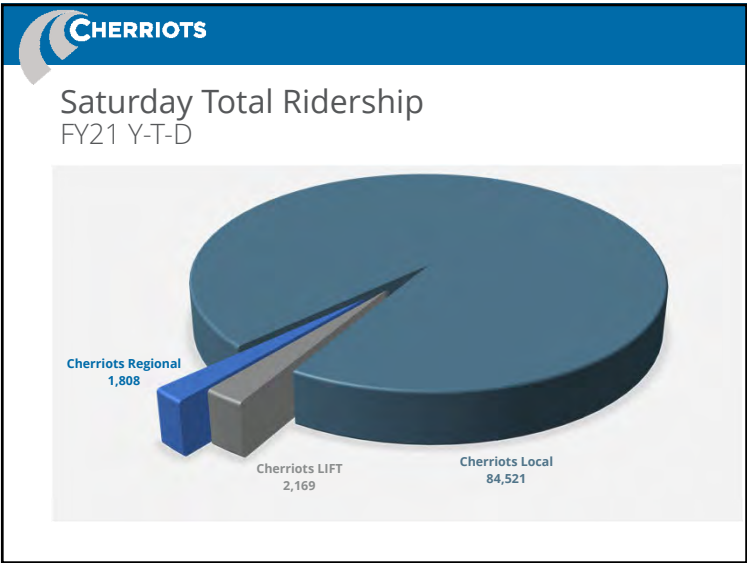
Rank	Stop Name	Direction	Stop ID	Routes	# Boardings	# Alightings	Total Activity	Activity/Day	Service Days
1	Lancaster @ Sunnyview	to Chemeketa CC	301	11	4,599	5,713	10,312	135.7	76
2	Lancaster @ Devonshire	to South Lancaster	462	11	4,505	3,589	8,094	106.5	76
3	Lancaster @ Market	to Downtown/South Lancaster	467	2,11	3,946	4,135	8,081	106.3	76
4	Lancaster @ Devonshire	to Keizer Transit Center	16	11	3,408	4,328	7,736	101.8	76
5	Lancaster @ Sunnyview	to South Lancaster	465	11	2,079	2,644	4,723	62.1	76
6	Lancaster @ Center	to Keizer Transit Center	1398	11	2,829	1,813	4,642	61.1	76
7	Broadway @ Salem Pkwy	to Downtown Transit Center	177	19	2,852	1,783	4,635	61	76
8	Lancaster @ Center	to South Lancaster	1397	11	1,314	3,286	4,600	60.5	76
9	River Rd @ Chemawa	to Parkmeadow/Keizer	63	9, 19	1,314	3,284	4,598	60.5	76
10	Center @ 36th	to Lancaster Drive	521	5	1,200	3,351	4,551	59.9	76

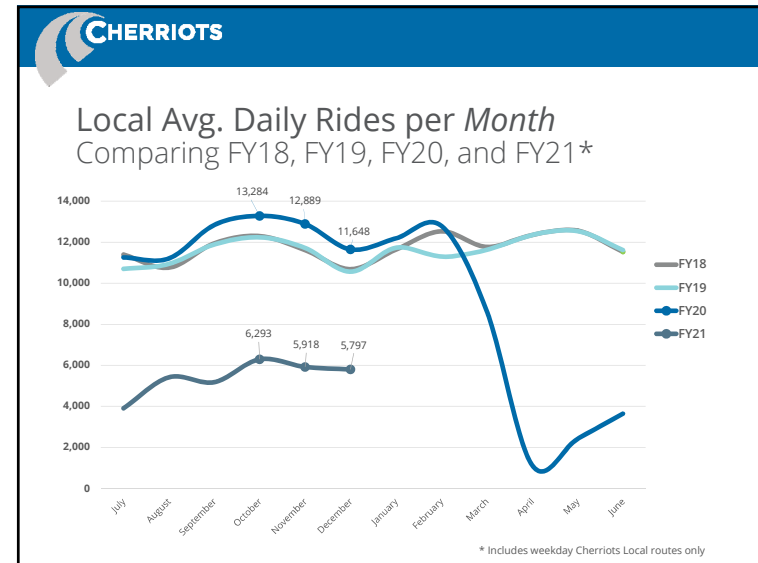
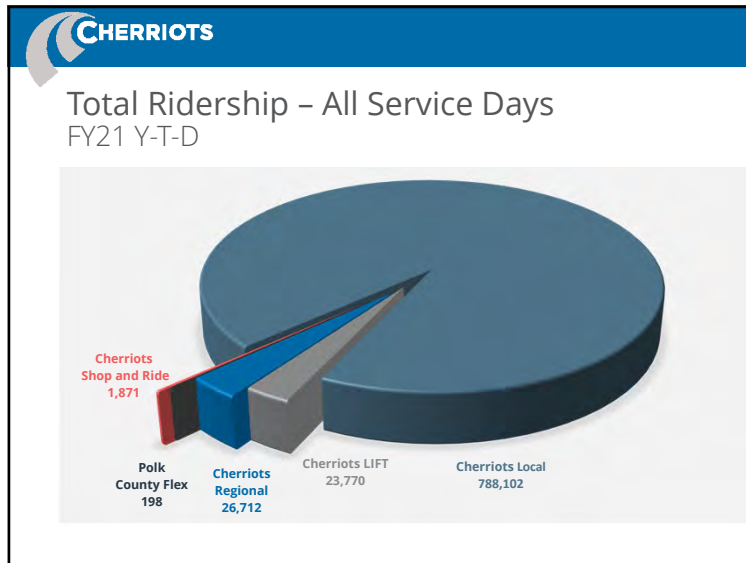
FY21 Q2 Performance Report

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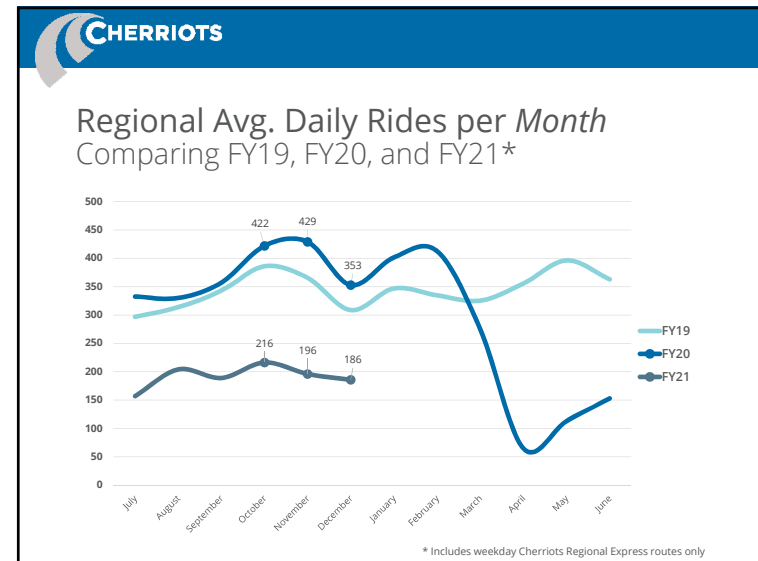


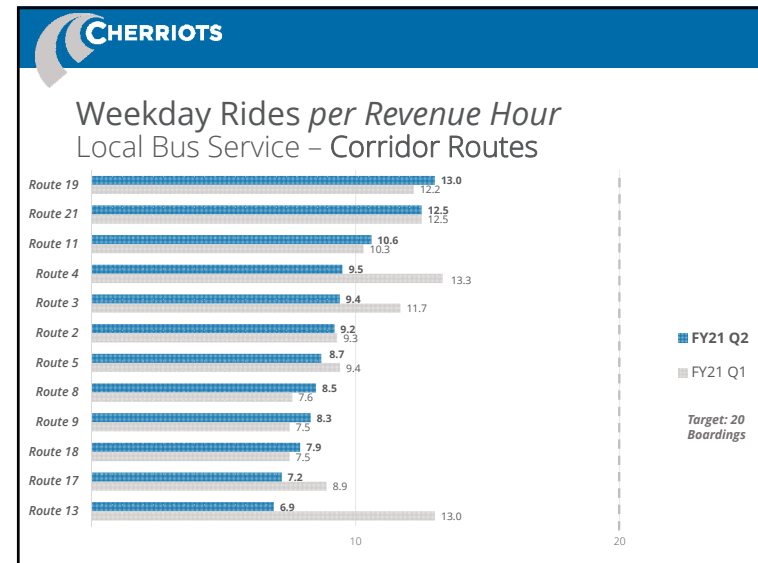
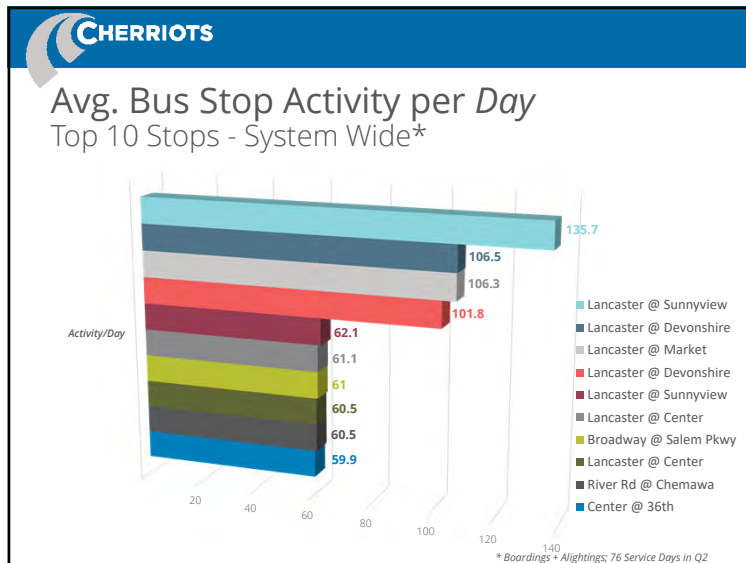
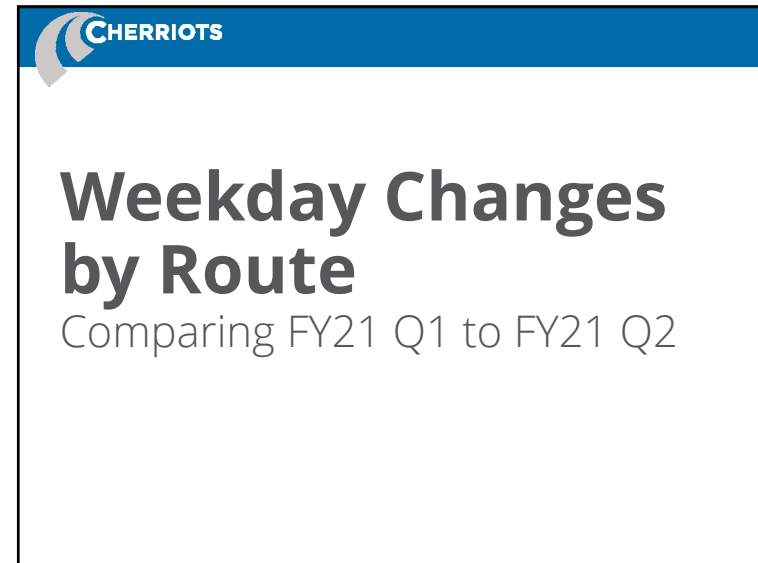
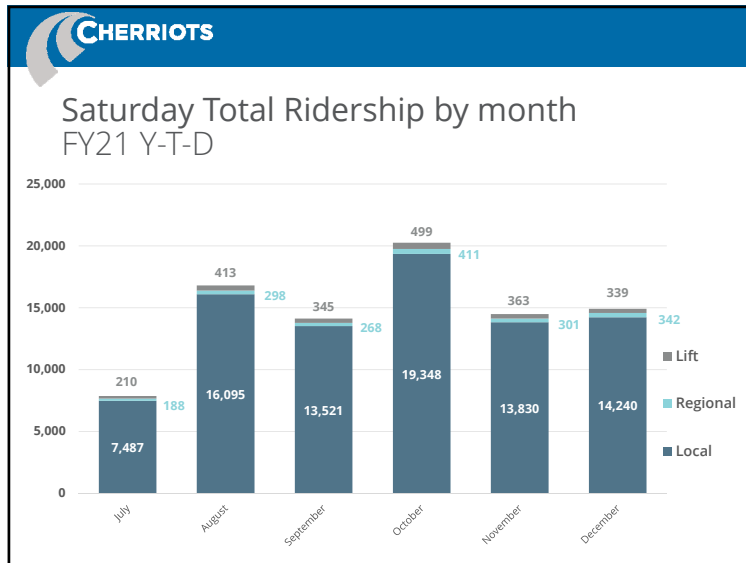
Ridership Totals

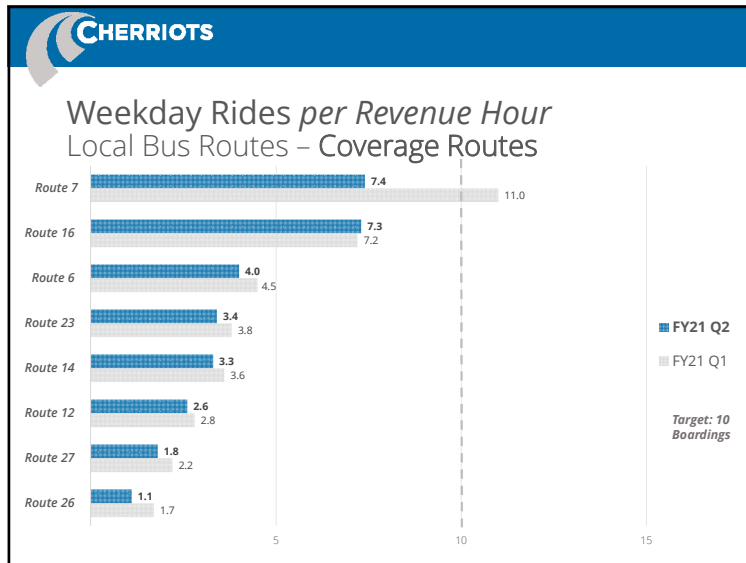




Ridership Averages



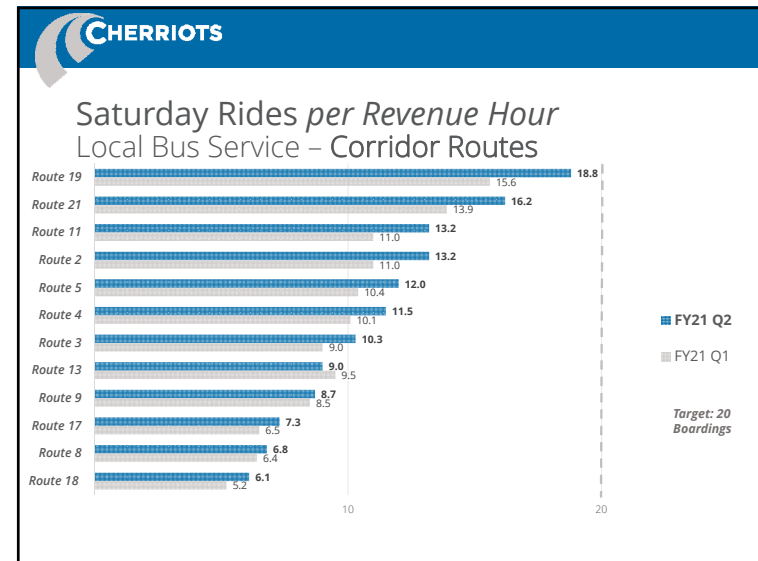
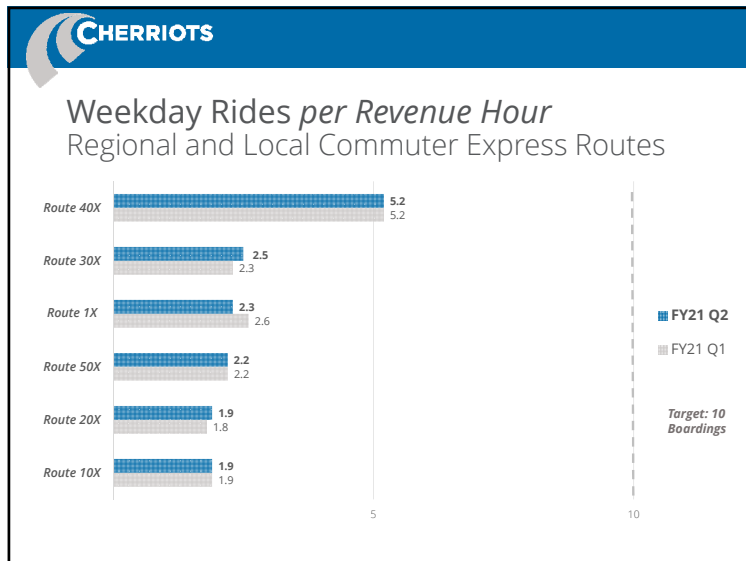


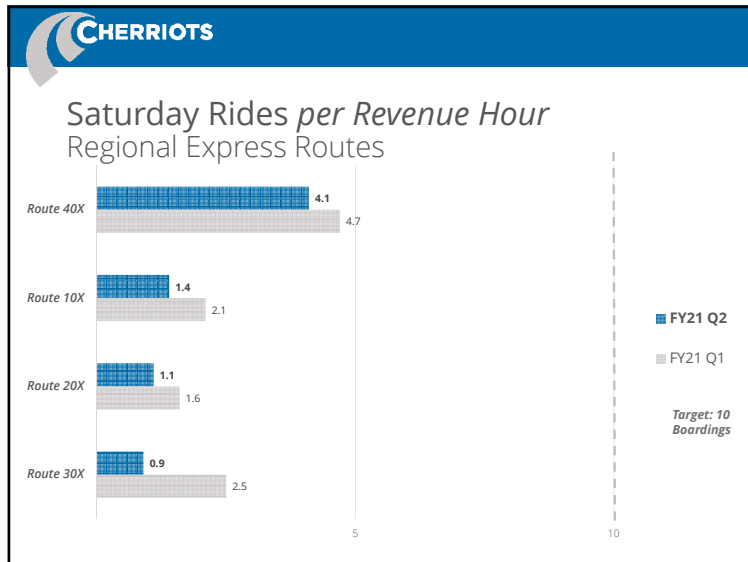
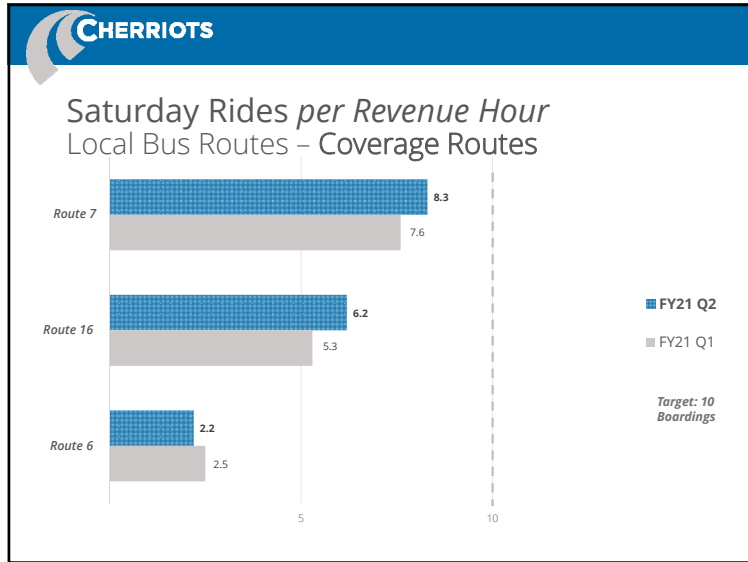


CHERRIOTS

Saturday Changes by Route

Comparing FY21 Q1 to FY21 Q2







To: Board of Directors

From: Roxanne Beltz, Transportation Options Coordinator
Patricia Feeny, Director of Communication

Thru: Allan Pollock, General Manager

Date: February 25, 2021

Subject: Cherriots Trip Choice FY 2021 – Second Quarter Report

ISSUE

The second quarter report of the FY 2021 Cherriots Trip Choice Program.

BACKGROUND AND FINDINGS

The activities, goals, and metrics of the Cherriots Trip Choice program are structured around the Oregon Department of Transportation’s 2020-2021 approved work plan, which details specific goals and activities to be accomplished during the year.

FINANCIAL IMPACT

None

RECOMMENDATION

None

PROPOSED MOTION

Information only

CHERRIOTS TRIP CHOICE

Second Quarter Report/2020-2021

October, November, December 2020

The Cheriots Trip Choice team members have been working remotely since mid-March and have adapted the program activities as the needs of the region have changed. Attending virtual conferences and learning from other transportation options programs has provided some insight into ways the program can remain active and help plan for the eventual return to work for many of the program participants.

GOAL: AWARENESS AND UNDERSTANDING

Community outreach

During the quarter, staff continued to engage with the community by promoting activities such as teleworking, bicycling, and walking. They also presented Cheriots updates at 30 Service Integration Team meetings and 12 chamber greeters/meetings. Staff also made a presentation about the Trip Choice program to the City of Salem/Cheriots service coordination team.

Employee Transportation Coordinators

Engagement with the employee transportation coordinators (ETCs) continues through the eNews and ETC meetings. The eNewsletter topics have included Cheriots service updates, promoting the Get There Challenge, walking safety, introducing new board members, working from home resources, and winter biking tips.

Staff continues to hold one-on-one meetings with ETCs to remain a resource and support throughout the pandemic. Many employers have a tentative schedule of returning to the office in the summer months.

GOAL: EXPANDED MARKETS

Telework

The final design of the Remote and Teleworking Toolkit was completed in November 2020. The feedback from the ETC network about the toolkit has been overwhelmingly positive and has been helping enhance teleworking programs. Staff will continue to promote and share this resource with employers and Transportation Options (TO) partners throughout the state.

This toolkit is filled with resources on various elements of teleworking that would benefit external stakeholders and partners. This project was approached with a no-one-size-fits-all mindset; meaning, this toolkit is intended to serve as a starting point

for the foundation for an organization's teleworking program and can be edited as needed. Various departments of an organization will be able to utilize the documents within the toolkit. There are resources that focus on HR concerns such as policies, agreement, and suitability assessments, teleworking tips for employees, and training for supervisors who are managing remote workers.

Group Pass Program

After assessing the impacts COVID-19 was having on our frontline workers and our community, the District decided to make all the Cherrits-services fare free until further notice. All participants of the Group Pass Program (GPP) were notified, and billing has been suspended until fare collection resumes.

Staff has continued to check in with the GPP employers to determine how Cherrits can continue to be a resource given that most of the workforce continues to work remotely to comply with social distancing requirements. The developed teleworking toolkit has served as a valuable resource to continue engagement and conversation with these employers.

Vanpool

Cherrits supports and subsidizes 18 vanpools. Due to commuters transitioning into a permanent work from home schedule and a decrease in ridership, six vans were terminated in the second quarter. One new van, which travels from Gaston to Sheridan, was started in December.

One-on-one meetings with vanpool coordinators were scheduled to offer any assistance and to also show our gratitude for continuing to commute safely amidst a pandemic.

Bicycling

It was recently announced that Cascadia Mobility, Inc. has received a Transportation Options Innovation Grant award. This ODOT-supported statewide nonprofit will offer centralized professional management of bike share systems in Salem, Eugene, Bend, Corvallis and Ashland.

Each participating community will — through user fees, sponsorships and local public funds — contribute the majority of its own system's operating costs; however, certain operating efficiencies will be achieved by working together, and a modest amount of state funding may also be made available to support the project.

Get There Oregon (self-reported data)

Total statewide users = 7,989			
Total regional users = 1,297			
New users	22	Train trips	0
Bike trips	511	Vanpool trips	0
Bus trips	258	Walk trips	341
Carpool trips	533	Telework trips	2,478

Get There Challenge summary

The challenge finished up in October with good regional participation. Here are the numbers of participants and the achievements earned/awarded.

Regional participation	225
Log one trip or a remote workday	158
Log five trips or remote workdays	135
Log ten trips or remote workdays	118
Plan and save a trip	113
Log 15 trips or remote workdays	77
Safety pro	61
Walk Safe	54
Remote-work pro	51
Make a pledge	51
Log 20 trips or remote workdays	48
Wi-Fi pro	46
Bike Safety	44
Tell us a story	43
Downloaded the commute tracker	31
Watch the Comcast Business Zoom Cast	22
Share your home office	19
Scavenger Hunts (total of three)	18
Liked us on Facebook	15

Get There Oregon participant survey

Of the 225 people in our region who participated in the Get There Challenge, 66 of them responded to the participant survey. Since this year's challenge was so different from previous years, there is little to compare year to year, but there are some notable items from the survey report.

When asked about the top five main reasons for participating in Challenge, the top reason with 74% response was the potential for winning prizes. The other top vote getters were 47% for both reducing emissions and staying healthy, 40% for making Oregon a better place, and 31% to save money.

When asked about mode choice during the challenge (and given the option to enter multiple responses) it's no surprise that 79% responded working from home. The next two most popular answers were walking at 66% and bicycling at 33%.

Other responses that will help inform future planning is that 55% of the respondents said ongoing rewards will continue to incentive them to use transportation options, 59% said the challenge helped them think more positively about using transportation options, and 95% see value in the state encouraging Oregonians to drive less.

GOAL: SAFETY

Safe Routes to School

Cherriots Trip Choice continues to partner with the Safe Routes to School program supporting their work in a variety of ways. In addition to serving on the SRTS steering committee, staff helped with the continued transition of the poster contest. This included designing the flier and the entry form (in English and Spanish) for the 2021 poster contest. Trip Choices' continued sponsorship allows the program ample resources to conduct the poster contest and the ability to create a calendar using the winners' artwork.

PROGRAM WORK AND ACTIVITIES

Staff accomplishments and kudos

In October, Roxanne Beltz, Trip Choice Program Coordinator, achieved the Transportation Demand Management Certified Professional (TDM-CP) certification. The Association for Commuter Transportation (ACT) established this national certification program that "supports the continuing education and professional development of TDM professionals."

Roxanne's longtime experience in planning, leadership, program evaluation, and many other areas gave her the ability to pass the extensive test for this certification. She covered such seemingly disparate topics as bike lane width in planning; traffic signal light sequencing for cars, cyclists, and pedestrians; funding mechanisms and organizations; budgeting; and even Roberts Rules of Order for public meetings.

Virtual conferences and webinars

Staff attended a variety of professional development, industry specific, and educational webinars, and conferences during the quarter. These included the Association for Commuter Transportation TDM Forum and the Adobe MAX Creative Conference.

Staff also attended webinars on subjects such as COVID's impact on transportation options and public transit, community revitalization, multifamily housing TDM, digital marketing, racial equity, and rider safety.


Staff maintains a close connection with community and industry groups which allows them to continue important regional connections. These include meetings with:

- Association for Commuter Transportation – Board member
- ACT Cascade Chapter – Board member
- Chehalem Valley Chamber of Commerce
- McMinnville Chamber of Commerce
- Monmouth/Independence Chamber of Commerce
- Polk County Leadership Breakfast
- Safe Routes to School – Steering Committee
- Salem Chamber of Commerce
- Salem Bike Club – Education and Community Outreach Committee
- Salem for Refugees – Transportation Action Committee
- Salem-Keizer Active Transportation Networking Group
- SEDCOR
- Statewide TDM meetings
- Transportation Options Group of Oregon – Board members
- Valley Vanpool Partnership
- Willamette University Sustainability Networking Group

Cherriots Trip Choice

FY 21 – Second Quarter Report

Roxanne Beltz
Trip Choice Program Coordinator





Community Outreach


- Service Integration Team meetings
 - Attended 30 during the quarter
 - 600 people per quarter attended



Awareness and Understanding



Community Outreach



- Chamber greeters
 - 12 during the quarter
 - 480 people
 - Roxanne Beltz appointed VP of MICC Board

CHERRIOTS
TRIP CHOICE

Employee Transportation Coordinators


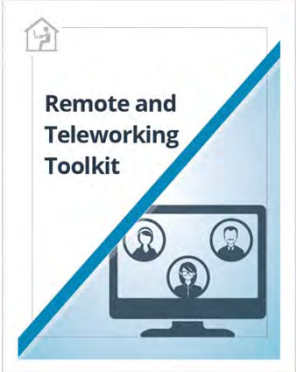



Employee Transportation Coordinator e-news
An e-newsletter for ETC's in the Willamette Valley

CHERRIOTS
TRIP CHOICE

Expanded Markets

- Telework toolkit
- Group Pass


Remote and Teleworking Toolkit

Expanded Markets

CHERRIOTS
TRIP CHOICE


CHERRIOTS
TRIP CHOICE

Expanded Markets


- Valley Vanpool
 - 18 vans subsidized by Cherriots
 - Upcoming meetings with Salem Health
- Bicycling
 - Cascadia Mobility

Get There Oregon




Get There Challenge Results

225 regional participants

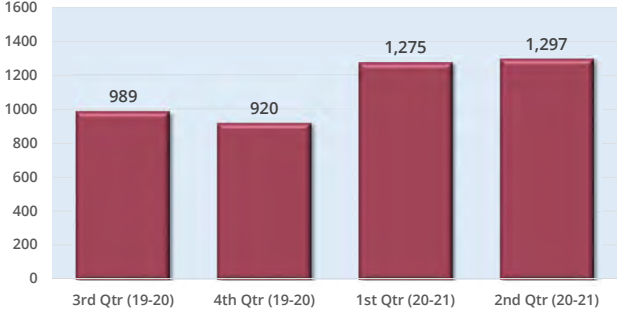


- 158 logged at least one trip or remote workday
- 61 people watched one or more of the training videos
- 51 made a pledge for behavior change
- 15 engaged with us on social media




Get There Oregon Users

Active Users





Quarter	Active Users
3rd Qtr (19-20)	989
4th Qtr (19-20)	920
1st Qtr (20-21)	1,275
2nd Qtr (20-21)	1,297



Get There Challenge Survey


- 66 responses to the survey
 - Top five reasons for participating
 - Prizes
 - Reducing carbon footprint
 - Staying healthy
 - Make Oregon a better place
 - Save money






Get There Challenge Survey

- **Mode Choice**
 - 79% Telework
 - 66% Walking
 - 33% Biking
- **Other responses**
 - 55% would like ongoing rewards
 - 59% more positive about transportation options
 - 95% see value in encouragement





Safety

- **Safe Routes to School activities**
 - New Website @ sksaferoutes.org
 - Poster contest
 - I like walking/biking/rolling because...
- **Promoting ODOT safety messages**
 - Trip Choice Facebook page
 - newsletters
 - Here: <https://youtu.be/bBVRE0ofyYg>

Safety



Program activities





Program activities

- **Professional development**
 - Program coordinator earns TDM-CP
- **Attended training and webinars**
 - COVID's impact on transportation options and public transit
 - Community revitalization
 - Multifamily housing TDM
 - Racial equity
 - Rider safety



Comments or questions?



BOARD MEETING MEMO

Agenda Item H.3

To: Board of Directors

From: Wendy Feth, Accounting Manager
David Trimble, Deputy General Manager

Thru: Allan Pollock, General Manager

Date: February 25, 2021

Subject: FY2021 Second Quarter Finance Report

ISSUE

Shall the Board receive the Second Quarter Finance Report for FY2020-21?

BACKGROUND AND FINDINGS

The Board adopts a Budget for the District on an annual basis. The Budget is a plan that contains District resources and requirements.

The quarterly Finance Report provides information about how that plan is being implemented and includes statements for the General Fund, Transportation Programs Fund, and Capital Project Fund. The Finance Report also 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.

General Fund Revenues:

STIF Formula funds are at 60% of annual budget. The total budgeted amount represents staff's best estimate based on ODOT forecast prior to budget.

The District received 98% of the projected *Property Taxes* in the second quarter of the year. This amount reflects the majority of the property taxes budgeted as tax payers take advantage of the largest discount offered when taxes are paid by November 16 (Nov.15 fell on a Sunday this year).

Oregon State In-Lieu reflects the first quarter's payment. The second quarter's payment of \$1.9 million was received in January.

Advertising is performing below the budgeted level, at 38% of the annual budget. The vendor and the District negotiated an agreement to waive the contract minimums through the month of December 2020, due to the pandemic-related reduction in business advertising. This agreement has been revised to extend through June 30, 2021.

Miscellaneous revenues continue to perform better than expected, at 92% of annual budget, due to the sales of various assets sold this year.

General Fund Expenditures:

The *Total Operating expenditures* of the General Fund are under budget at 41% of total annual budget. All divisions in the General Fund are at or below the anticipated 50% of total budget, ranging from 27% to 47% of annual budget expended.

Transportation Programs Fund Revenues:

STIF Formula, STIF Pass-Through Formula Funds, and STF Pass-Through Funds categories are all at 50% of annual budget. *STF Funds* for the District are above projection at 59%.

Federal Funds, including *CARES Act* funding in FY21 behind projections in the second quarter. This is expected because we must incur the expenses prior to requesting a drawdown from FTA. Second quarter drawdowns are expected to be received by the end of February. *CARES Act* funding is at 59% of annual budget.

DD53 Revenues in FY21 are lagging behind projections at 1%. This reflects only one month's payment. In January we received another \$68,077 for August – October 2020. Even when including those payments we are at 5% of budget. The FY21 budget assumptions we projected that our fund would drop 28% from FY20 funding. The pandemic has hit this revenue source much harder than anticipated. Sheltered workshops where many of the DD53 riders work remains shut down. A few of the DD53 independent workers have returned to private work sites which reflects the payments we have received.

Transportation Programs Fund Expenditures:

The *Total Transportation Programs Fund* expenditures are at 36% of annual budget. All programs are near or below the anticipated 50% of total budget, ranging from 12% to 46% of annual budget expended.

Special Transportation Coordination category is at 12% of annual budget. This reflects reimbursement to sub-recipients for the first quarter. Second quarter reimbursements were paid in January 2021.

Capital Projects Fund Revenues:

Total Capital Revenues in the Capital Projects Fund are at 7% of total budget this quarter reflecting first quarter reimbursements from FTA and STIF funds.

Capital Projects Fund expenditures:

Overall the *Capital Projects Fund* expenditures are 11% of the annual approved budget. Among the projects budgeted, the Del Webb Power Generator Project replaced one generator. The CAD/AVL, APC Counters, and ITS Systems Implementation Project continues to move forward as well as the Lo/No Emission Bus Project. Also, the IT Server Project is making progress and the IT Switch Replacement Project was completed.

FINANCIAL IMPACT

None. For informational purposes.

RECOMMENDATION

Staff recommends that the Board receive and file this Second Quarter Financial Report for FY2020-21.

PROPOSED MOTION

None.

**Salem Area Mass Transit District
 Fiscal Year 2020-21 2nd Quarter Financial Report
 July 1 - December 31, 2020**

**General Fund Revenues/Resources and
 Expenses/Requirements Summary**

			FY2020-21 Adopted			
	Actual	50% of Adopted and Amended Budget	and Amended Budget	% of Budget		
1	<u>Operating Revenues/Resources</u>					1
2	Passenger Fares	\$ 555	\$ 782,955	\$ 1,565,910	0%	2
3	Federal Funding	24,111	67,193	134,385	18%	3
4	Federal CARES Act	52,932	3,931,498	7,862,995	1%	4
5	Federal 5307	-	1,539,020	3,078,040	0%	5
6	STIF Formula	3,120,030	2,585,500	5,171,000	60%	6
7	STIF Discretionary	781	26,428	52,856	1%	7
8	Advertising	45,741	60,000	120,000	38%	8
9	Miscellaneous	411,636	224,925	449,850	92%	9
10	Property Taxes	12,713,587	6,475,000	12,950,000	98%	10
11	Oregon State In-Lieu	1,794,224	3,559,000	7,118,000	25%	11
12	Corona Virus Relief Fund	50,093	50,000	100,000	50%	12
13	Interest on Investments	69,151	146,000	292,000	24%	13
14	Renewable Gas Credits	70,718	110,000	220,000	32%	14
15	Transfers from Other Funds	-	-	-		15
16	Operating Revenues/Resources Total	\$ 18,353,559	\$ 19,557,519	\$ 39,115,036	47%	16
17	<u>Operating Expenses/Requirements</u>					17
18	General Manager/Board/Strategic Init.	\$ 368,936	\$ 684,162	\$ 1,368,323	27%	18
19	Administration	404,142	427,696	855,391	47%	19
20	Finance & Technology	1,487,833	1,578,012	3,156,021	47%	20
21	Marketing & Communications	695,466	1,123,132	2,246,264	31%	21
22	Operations	10,846,224	12,916,242	25,832,481	42%	22
23	Unallocated General Administration	458,878	571,275	1,142,550	40%	23
24	Operating Expenses/Requirements Total	\$ 14,261,479	\$ 17,300,519	\$ 34,601,030	41%	24

Salem Area Mass Transit District
Fiscal Year 2020-21 2nd Quarter Financial Report
July 1 - December 30, 2020

General Fund Departments			50% of Adopted and Amended Budget	FY2020-21 Adopted and Amended Budget	% of Budget	
Expenses/Requirements Summary		Actual	Budget	Budget	Budget	
1	General Manager/Board of Directors/SIPM					1
2	General Manager	\$ 250,994	\$ 318,361	\$ 636,722	39%	2
3	Board of Directors	536	16,250	32,500	2%	3
4	Strategic Initiatives and Program Mgt.	117,406	349,551	699,101	17%	4
5	Total	368,936	684,162	1,368,323	27%	5
6	Administration					6
7	Human Resources	333,297	302,802	605,603	55%	7
8	Human Resources Safety	70,845	124,894	249,788	28%	8
9	Total	404,142	427,696	855,391	47%	9
10	Finance					10
11	Finance	589,643	686,806	1,373,611	43%	11
12	Procurement	138,749	158,026	316,051	44%	12
13	Information Technology	759,441	733,180	1,466,359	52%	13
14	Total	1,487,833	1,578,012	3,156,021	47%	14
15	Communication					15
16	Marketing and Communications	319,903	539,883	1,079,766	30%	16
17	Customer Service	303,194	429,303	858,606	35%	17
18	Travel Trainer	28,074	28,946	57,892	48%	18
19	Vanpool Lease	44,295	125,000	250,000	18%	19
20	Total	695,466	1,123,132	2,246,264	31%	20
21	Operations					21
22	Operations Administration	264,295	347,750	695,499	38%	22
23	Vehicle Maintenance	2,407,046	2,837,675	5,675,350	42%	23
24	Facility Maintenance	623,564	579,148	1,158,296	54%	24
25	Security	395,487	579,984	1,159,968	34%	25
26	Cherriots Fixed Route Service	6,887,961	8,148,594	16,297,187	42%	26
27	Planning	267,871	423,091	846,181	32%	27
28	Total	10,846,224	12,916,242	25,832,481	42%	28
29	Unallocated General Administration	458,878	571,275	1,142,550	40%	29
	<u>Notes:</u>					
30	Reclass Prior Yr. - Temporary Occupancy	4,801	-	-		30
31	General Fund Expenses/Requirements Total	\$ 14,266,280	\$ 17,300,519	\$ 34,601,030	41%	31

Salem Area Mass Transit District
Fiscal Year 2020-21 2nd Quarter Financial Report
July 1 - December 31, 2020

Capital Project Fund Revenues/Resources and Expenses/Requirements Summary		Actual	50% of Adopted and Amended Budget	FY2020-21 Adopted and Amended Budget	% of Budget
1	Capital Revenues/Resources				
2	Net Working Capital		23,150	\$ 46,299	0%
3	Federal Funding	945,037	5,864,555	11,729,110	8%
4	Connect Oregon Funds	-	-	-	
5	State STF Funds	-	-	-	
6	State STIF Funds	110,325	570,033	1,140,065	10%
7	Miscellaneous	-	268,682	537,363	0%
8	Interest on Investments	-	-	-	
9	Transfers from Other Funds	-	1,159,269	2,318,538	0%
10	Capital Revenues/Resources Total	\$ 1,055,362	\$ 7,885,689	\$ 15,771,375	7%

Capital Expenses/Requirements Summary by Division					
11	Finance and Technology	\$ 86,266	\$ 645,779	\$ 1,291,557	7%
12	GM/Board/SIPM	1,249,039	\$ 1,789,633	3,579,266	35%
13	Operations	251,880	\$ 4,777,447	9,554,893	3%
14					
15	Capital Expenses/Requirements Total	\$ 1,587,185	\$ 7,212,859	\$ 14,425,716	11%

Salem Area Mass Transit District
Fiscal Year 2020-21 2nd Quarter Financial Report
July 1 - December 31, 2020

Transportation Programs Fund Revenues/Resources and Expenses/Requirements Summary		Actual	50% of Adopted and Amended Budget	FY2020-21 Adopted and Amended Budget	% of Budget	
1	<u>Transportation Fund Revenues/Resources</u>					1
2	Passenger Fares	\$ 450	\$ 139,100	\$ 278,200	0%	2
3	Federal Funds	76,491	1,327,382	2,654,763	3%	3
4	Cares Act	468,061	1,073,640	2,147,279	22%	4
5	State Funds	370,296	312,493	624,985	59%	5
6	Rideshare Grant	54,291	137,531	275,062	20%	6
7	TDM Grant	44,248	90,165	180,330	25%	7
8	DD53 Revenues	12,741	881,175	1,762,350	1%	8
9	STF Pass Through Funds	127,884	127,882	255,764	50%	9
10	Rural Veterans Health Pass Through Funds	-	22,500	45,000	0%	10
11	STIF Formula Pass Through Funds	273,852	273,850	547,700	50%	11
12	STIF Formula	452,260	452,275	904,550	50%	12
13	Interest on Investments	999	-	-		13
14	In kind match	-	19,435	38,869	0%	14
15	Transfers from Other Funds	-	777,500	1,555,000	0%	15
16	Transportation Fund Revenues/Resources Total	\$ 1,881,573	\$ 5,634,928	\$ 11,269,852	17%	16
17	<u>Transportation Fund Expenses/Requirements</u>					17
18	Communication	\$ 168,610	247,131	\$ 494,261	34%	18
19	Operations	3,561,959	4,621,614	9,243,227	39%	19
20	GM/Board/SIPM	102,305	442,593	885,185	12%	20
21	Transportation Fund Expenses/Requirements Total	\$ 3,832,874	\$ 5,311,338	\$ 10,622,673	36%	21

Salem Area Mass Transit District
Fiscal Year 2020-21 2nd Quarter Financial Report
July 1 - December 31, 2020

Transportation Programs Fund Summary of Expenses/Requirements by Program	Actual	50% of Adopted and Amended Budget	FY2020-21 Adopted and Amended Budget	% of Budget	
1 Operations					1
2 Cherriots Lift	\$ 2,303,963	\$ 3,198,146	\$ 6,396,291	36%	2
3 Cherriots Shop & Ride	216,815	237,920	475,839	46%	3
4 Cherriots Regional	951,372	1,068,293	2,136,586	45%	4
5 Mobility Management	89,809	117,256	234,511	38%	5
6 Operations Total	3,561,959	4,621,615	9,243,227	39%	6
7 Communication					7
8 Trip Choice	168,610	247,131	494,261	34%	8
9 Communication Total	168,610	247,131	494,261	34%	9
10 GM/Board/SIPM					10
11 Special Transportation Coordination	102,305	442,593	885,185	12%	11
12 GM/Board/SIPM Total	102,305	442,593	885,185	12%	12
13 Transportation Programs Fund Total	\$3,832,874	\$5,311,339	\$ 10,622,673	36%	13



To: Board of Directors
From: Allan Pollock, General Manager
Date: February 25, 2021
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 Director Nguyen	Diversity, Equity, and Inclusion Committee
Subdistrict 2 Director Busch	
Subdistrict 3 Director Carney	Salem-Keizer Area Transportation Study (SKATS)
Subdistrict 4 Director Hinojos Pressey	Citizens Advisory Committee
Subdistrict 5 Director Davidson	Mid-Willamette Valley Council of Governments (MWVCOG) Mid-Willamette Area Commission on Transportation (MWACT)
Subdistrict 6 Director Krebs	
Subdistrict 7 Director Richards	State Transportation Improvement Fund Advisory Committee Special Transportation Fund Advisory Committee