



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



March 2024

## ACKNOWLEDGEMENTS

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

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

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

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## ACRONYMS

ACS – American Community Survey

FTA – Federal Transit Administration

LEP – Low English Proficiency

NEMT – Non-Emergency Medical Transportation

PMT – Project Management Team

ODOT – Oregon Department of Transportation

SAMTD – Salem Area Mass Transit District

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

STF – Special Transportation Fund

STIF – Statewide Transportation Improvement Fund

STIFAC – Statewide Transportation Improvement Fund Advisory Committee

TAC – Technical Advisory Committee

TSP – Transportation System Plan

UGB – Urban Growth Boundaries

## INTRODUCTION

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

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

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

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

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

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

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



## CHAPTER 1: BACKGROUND AND METHODOLOGY

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

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

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

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

- Outreach was conducted to transit service providers and social service providers to learn more about the perceived needs and gaps, potential coordination opportunities and what types of services, programs, or advances in technology could help address service gaps or offer new and innovative services.
- A survey was available for both current riders and non-riders to provide feedback on their needs and desired service improvements.
- Four stakeholder workshops were convened to (1) discuss the transportation needs, gaps, and challenges specific to seniors and people with disabilities; (2) identify geographic, regulatory, and structural barriers to addressing these needs; and (3) share ideas for new and innovative services. Workshop invitees included transportation providers, community organizations, senior centers, and human and health services agencies, representing a diverse group of services and geographies.

The full public involvement summary is included in Appendix A.

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## Coordinated Transportation Plan Requirements

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Oregon administrative rule requires STIF agencies to provide a locally developed, coordinated public transit-human services plan to identify needs, strategies, and funding options to improve services  
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and programs for older adults, people with disabilities, and people with low income. ODOT provides the following requirements for Coordinated Public Transit – Human Services Plans:

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

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## Assessing Need and Identifying Proposed Service

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

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

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

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

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

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## Funding and Relevant Grant Programs

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

### Consolidation of STF and STIF Funding

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

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

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

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

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

## CHAPTER 2: SERVICE AREA AND DEMOGRAPHIC PROFILE

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

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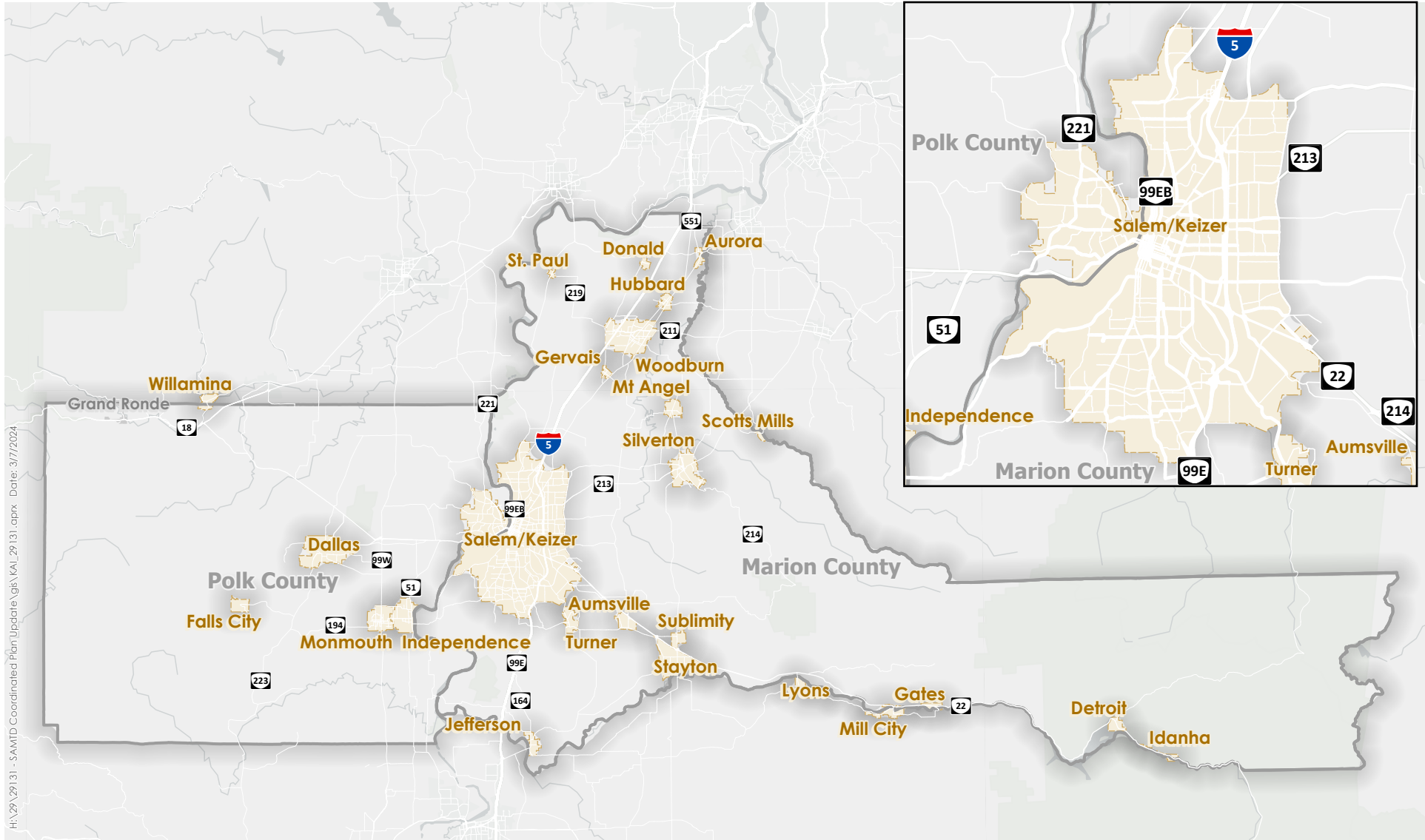
### Service Area

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

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

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



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-  County
-  Urban Growth Boundary (UGB)



Figure 1

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

## Demographic Profile

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

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

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

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

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

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

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

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

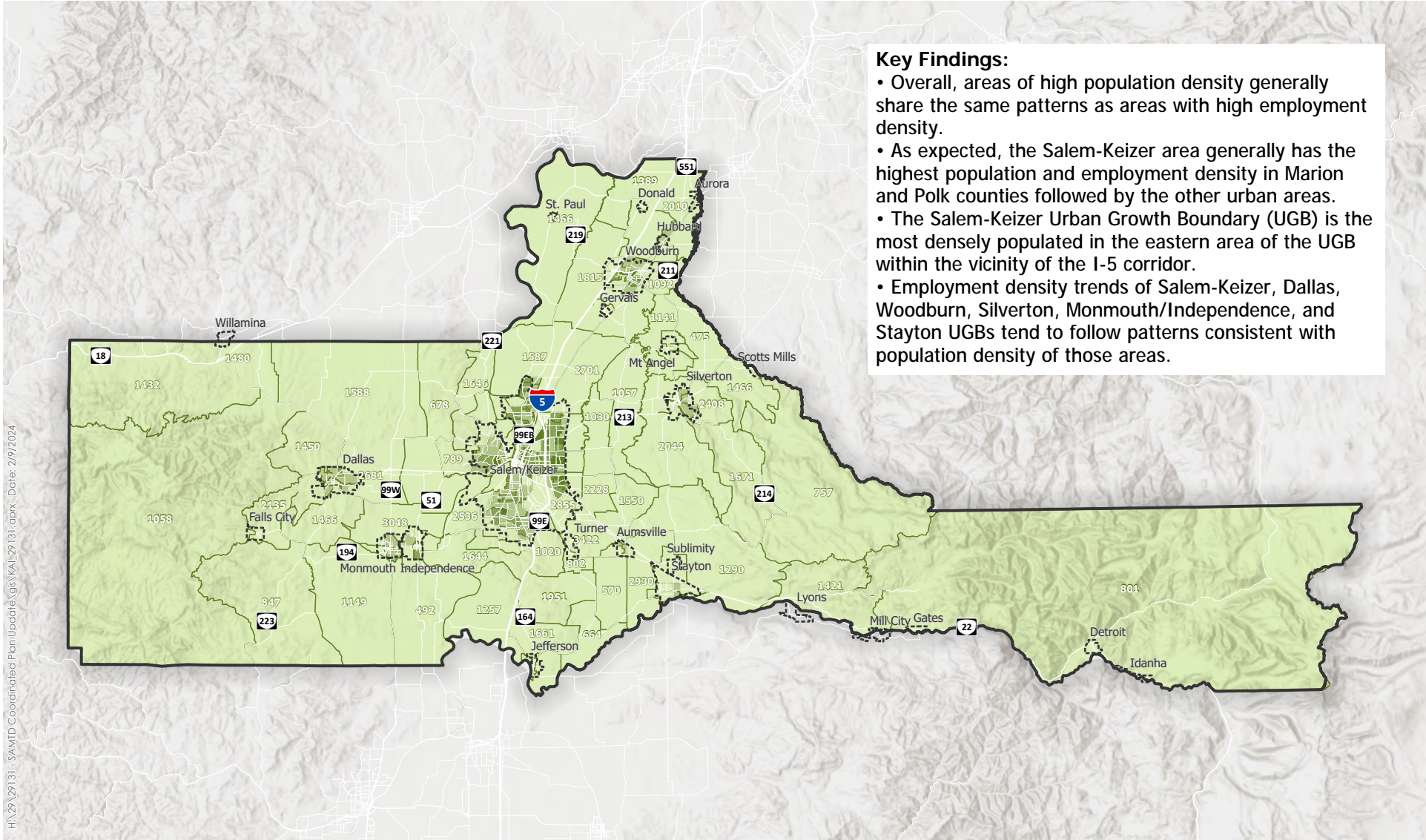
Figures 2-13 show where transit-dependent populations live throughout Marion and Polk counties. Data is taken at the most refined level available (typically block group, with some census-tract). Areas are shaded by the density or percentage of the population/households within that demographic, and labeled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

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

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

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





**Key Findings:**

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

**People per Square Mile by Block Group**

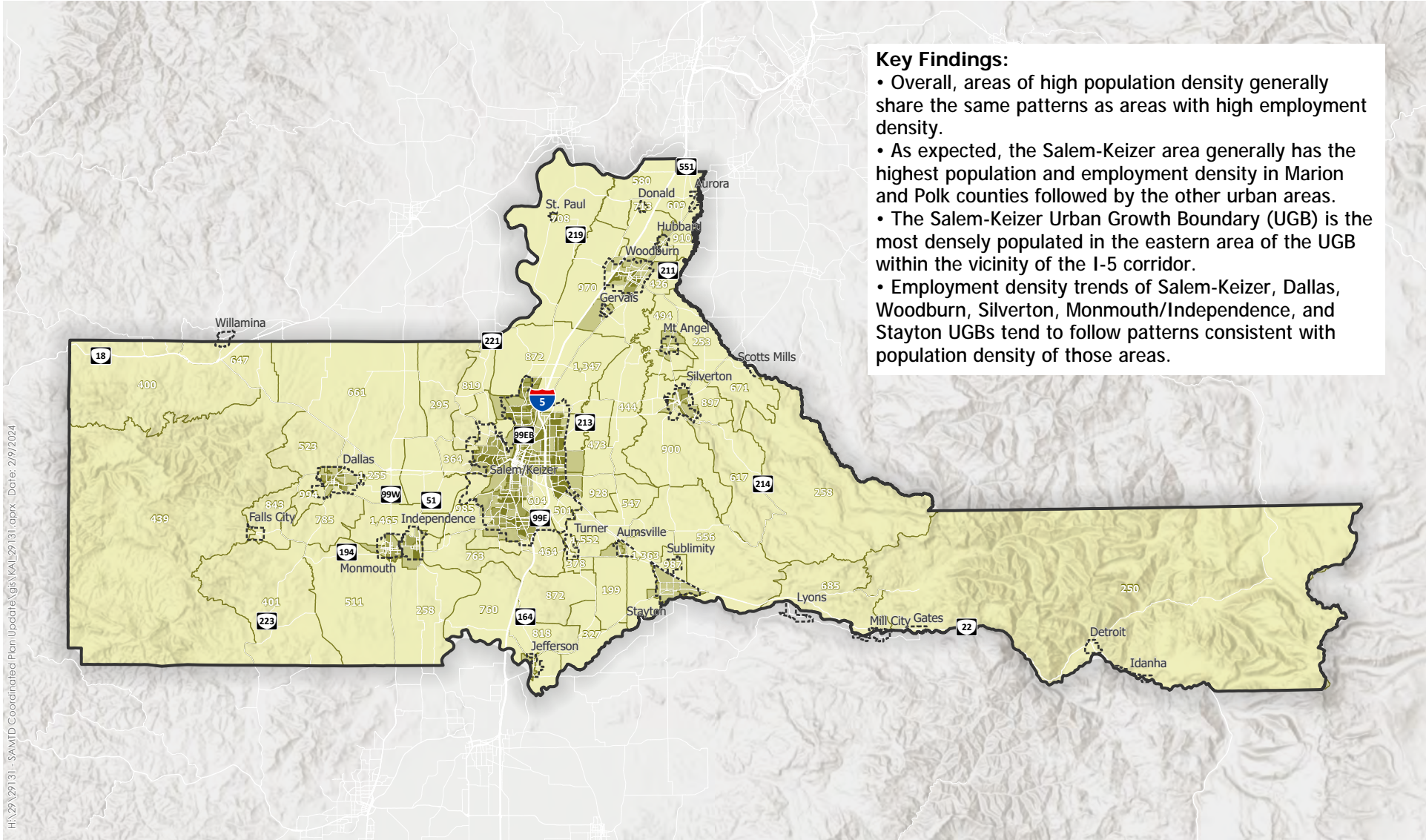
- 2 - 2,194
- 2,195 - 5,116
- 5,117 - 8,763
- 8,764 - 18,139

- County Boundary
- UGB



Values shown in each Block Group indicate total population.





Figure 2  
**Population Density  
Marion and Polk Counties**



**Key Findings:**

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

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

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



-  County Boundary
-  UGB

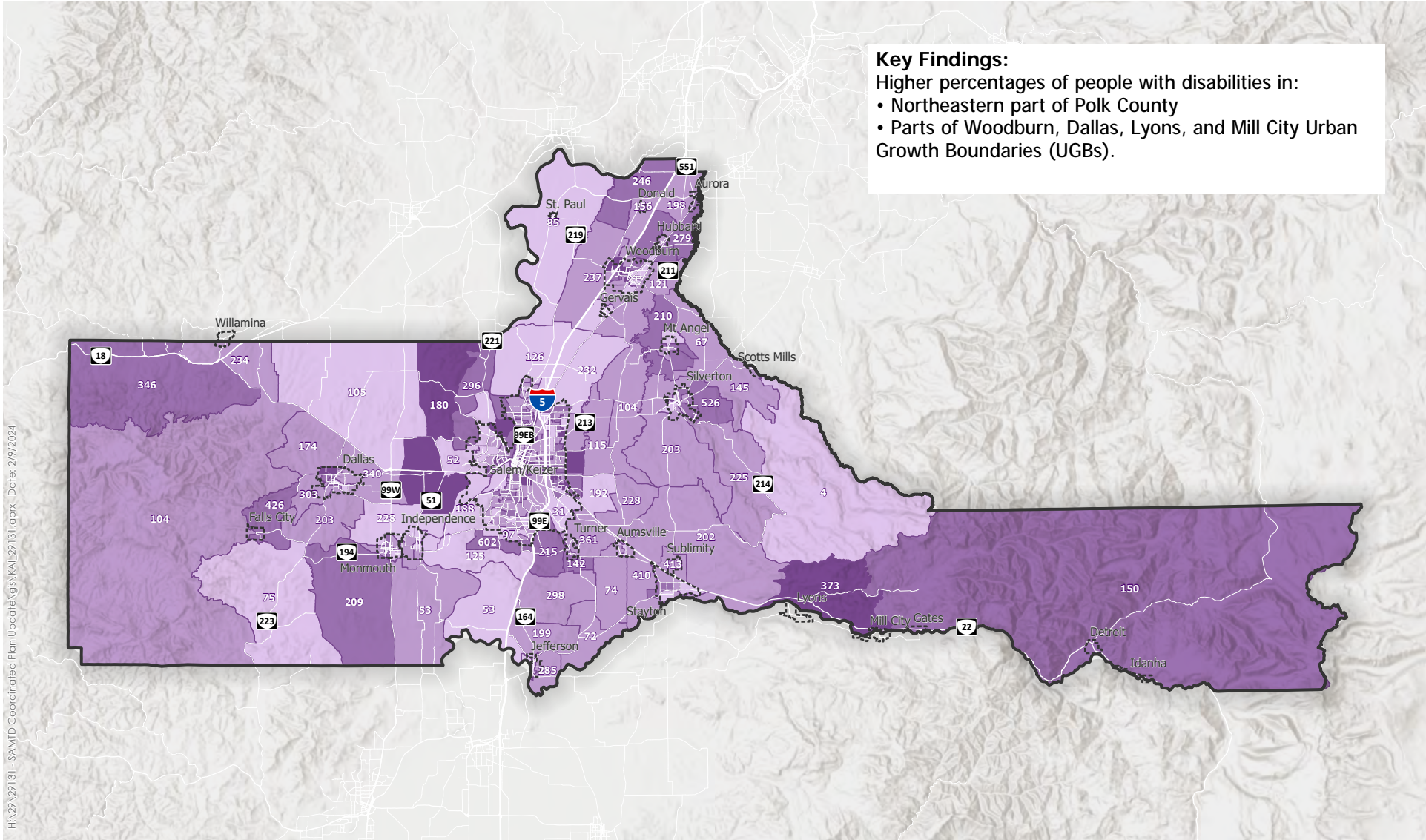


Figure 3

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

Values shown in each Block Group indicate total employment.

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

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

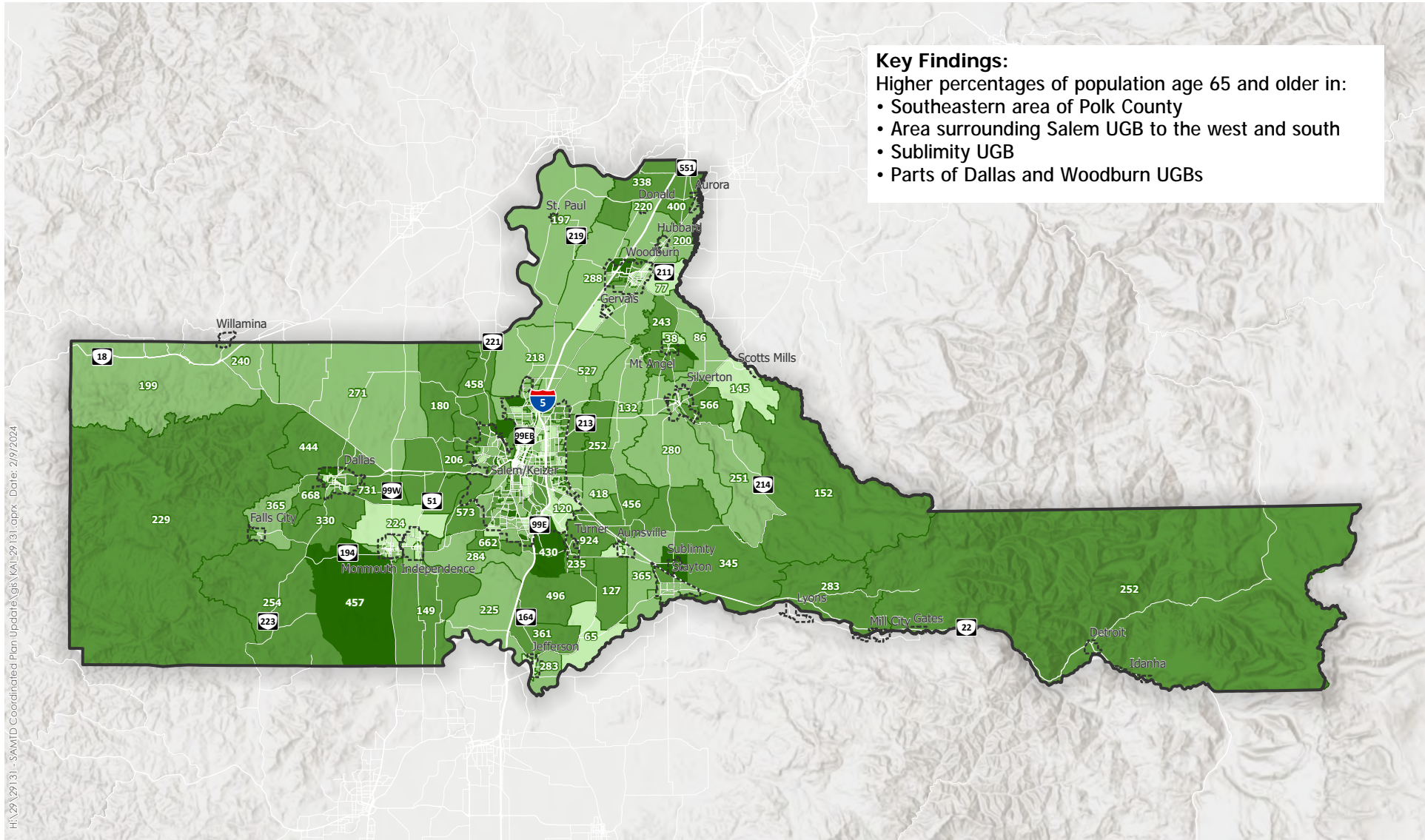
- County Boundary
- UGB



Figure 4

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

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



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

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

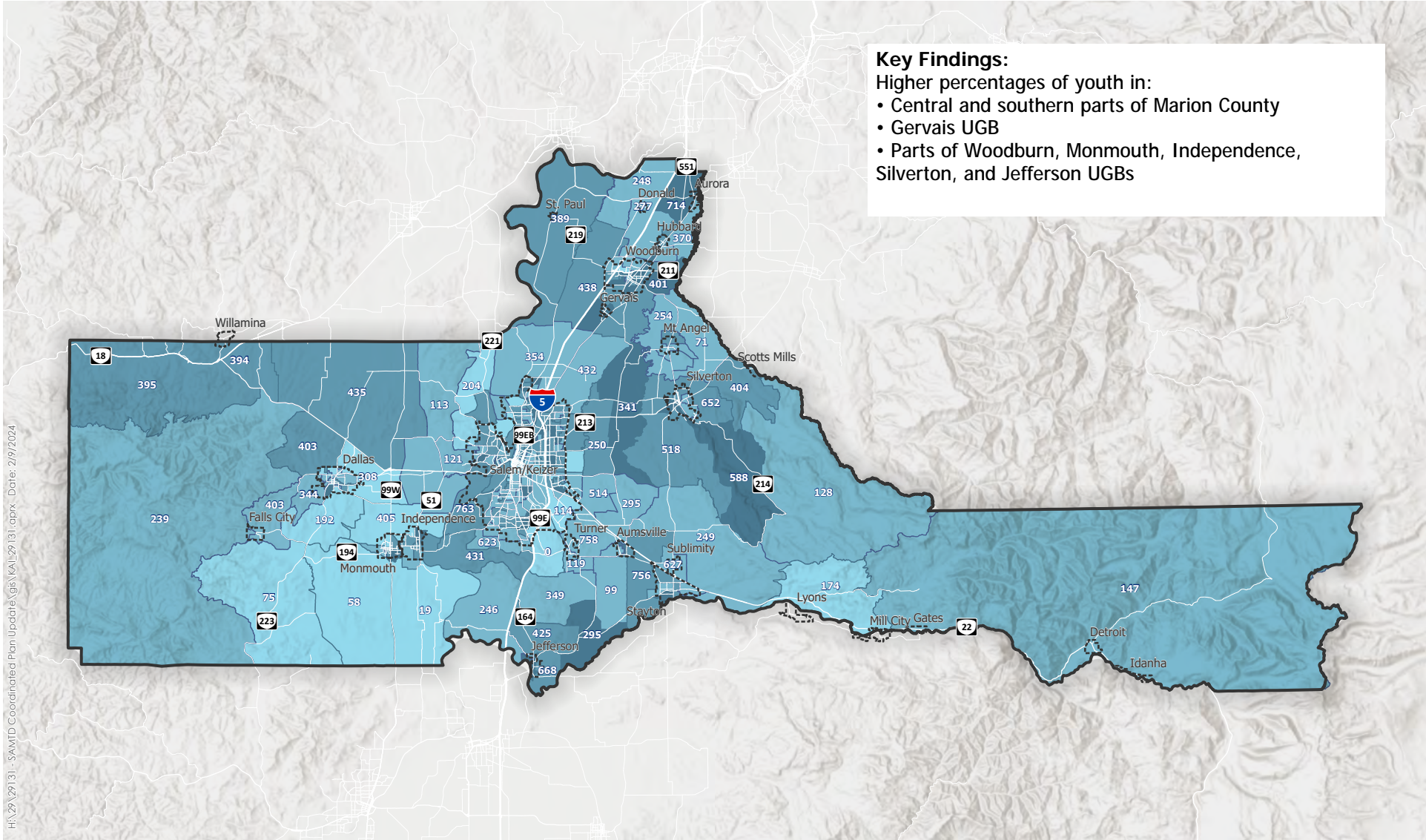
- County Boundary
- UGB



Figure 5

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

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



**Key Findings:**  
 Higher percentages of youth in:  
 • Central and southern parts of Marion County  
 • Gervais UGB  
 • Parts of Woodburn, Monmouth, Independence, Silverton, and Jefferson UGBs

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

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

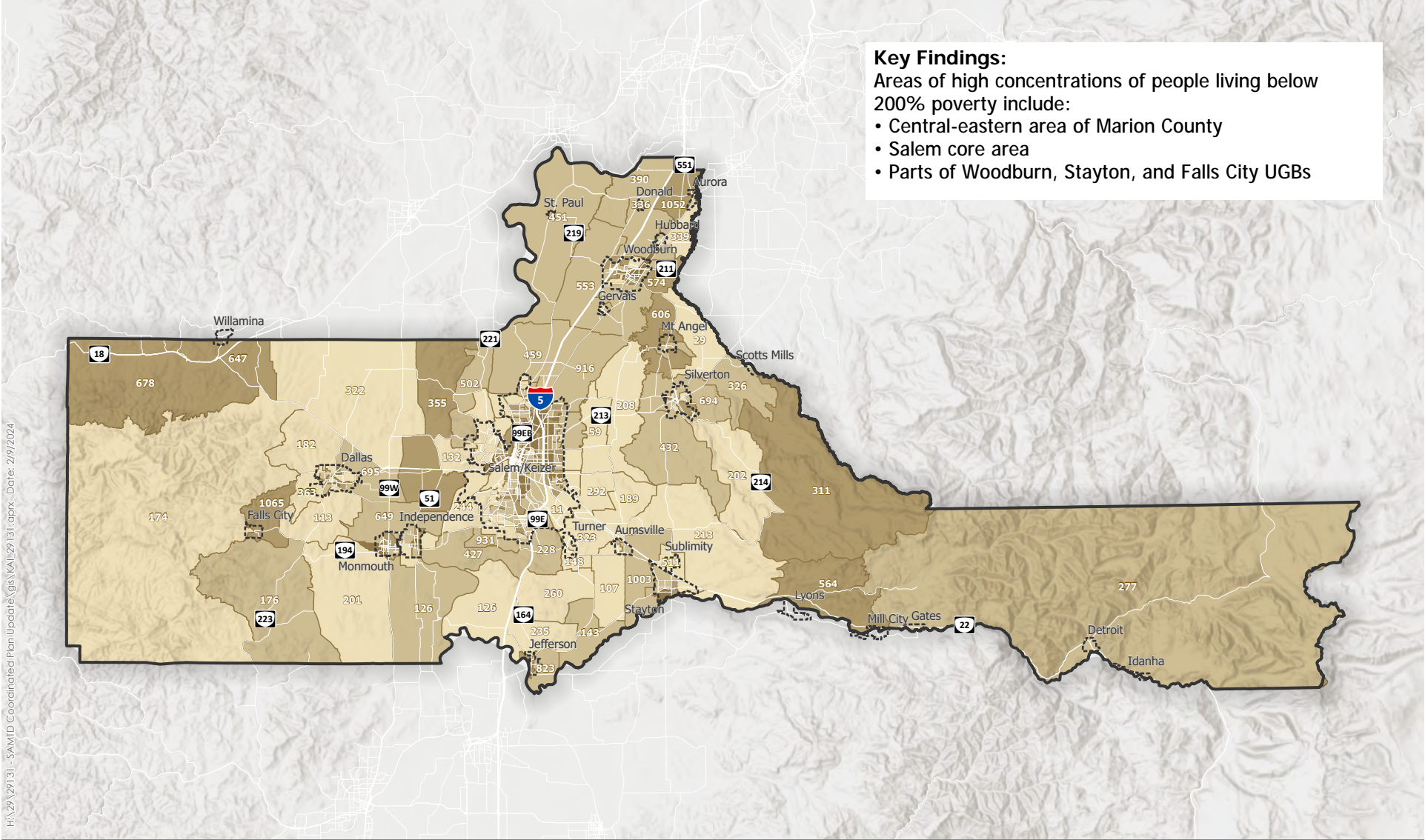
County Boundary  
 UGB

0 20 Miles

Figure 6

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

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



**Key Findings:**  
 Areas of high concentrations of people living below 200% poverty include:

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

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

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

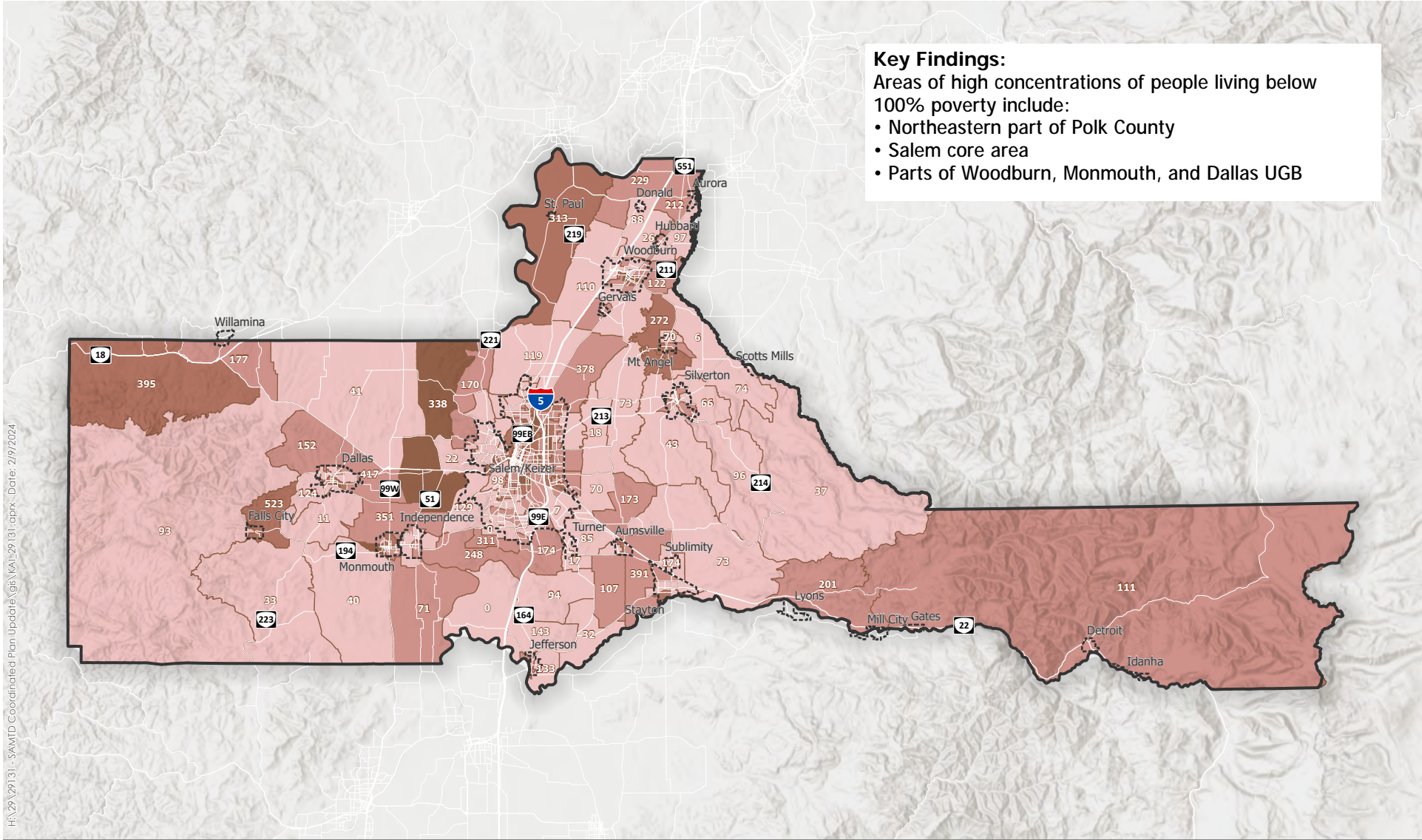
- County Boundary
- UGB



Figure 7

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

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



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

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

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

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

County Boundary  
 UGB

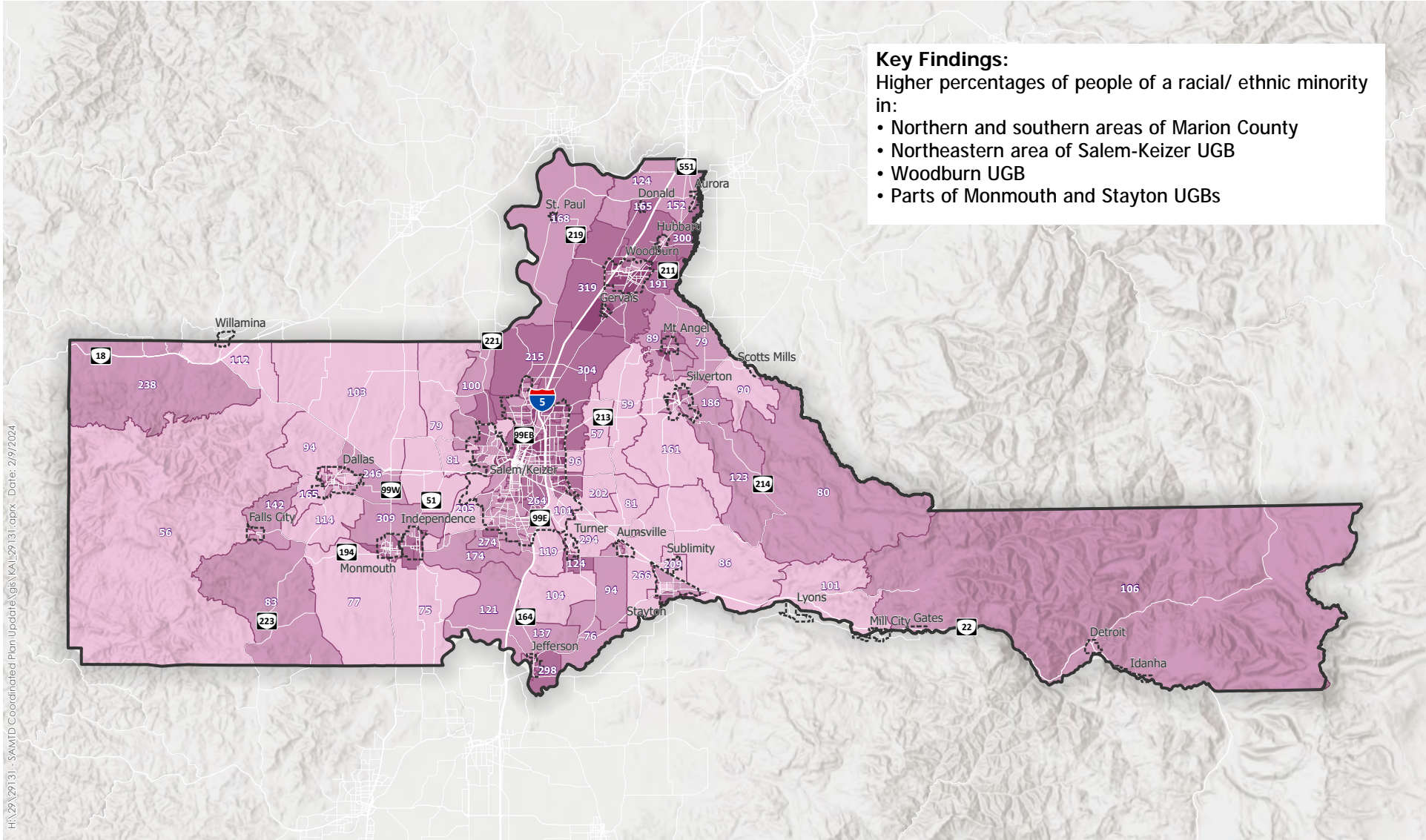
0 20 Miles

Figure 8

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

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

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

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

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

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

County Boundary  
 UGB

0 | 20 Miles

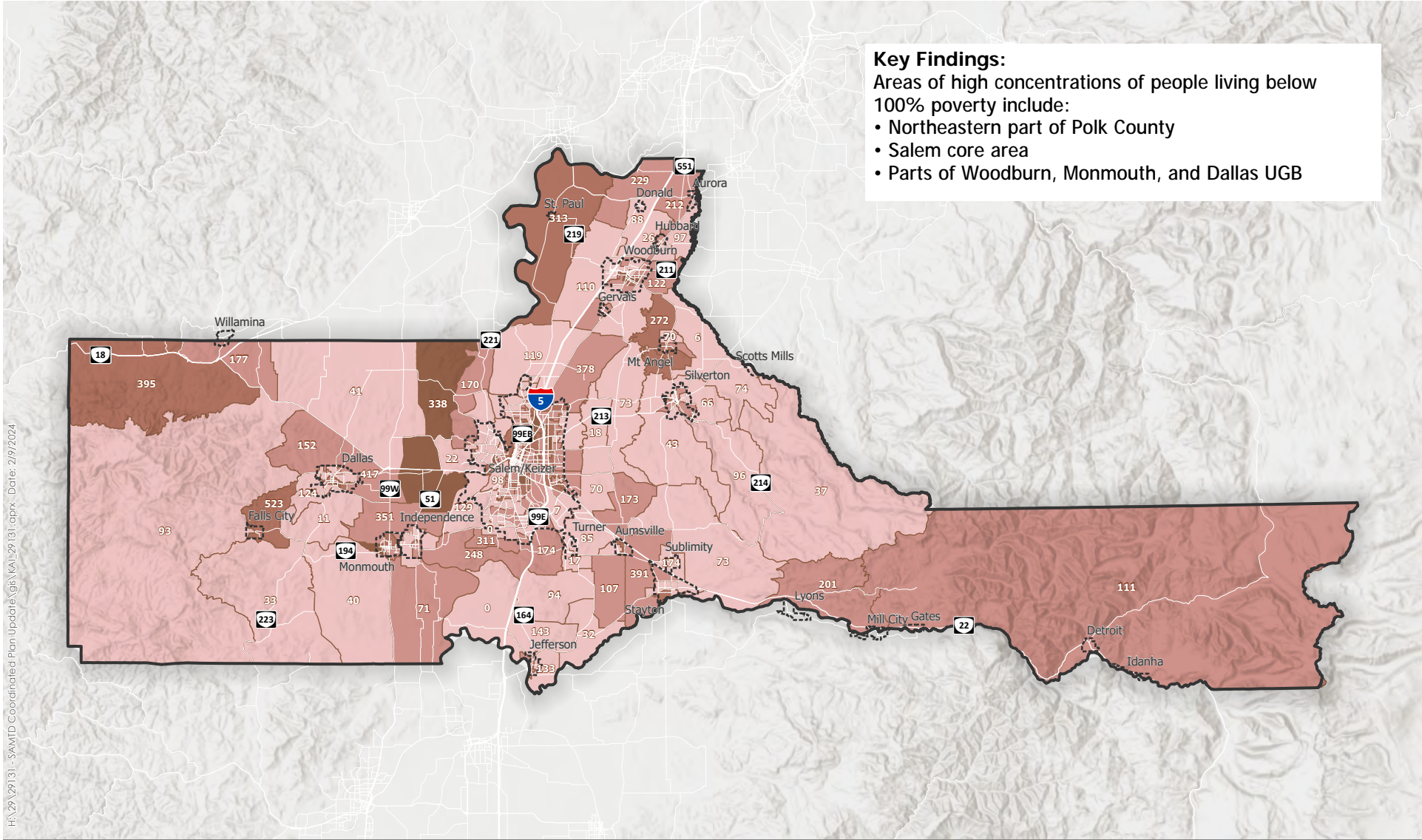
Figure 9

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

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

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

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

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

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

County Boundary  
 UGB

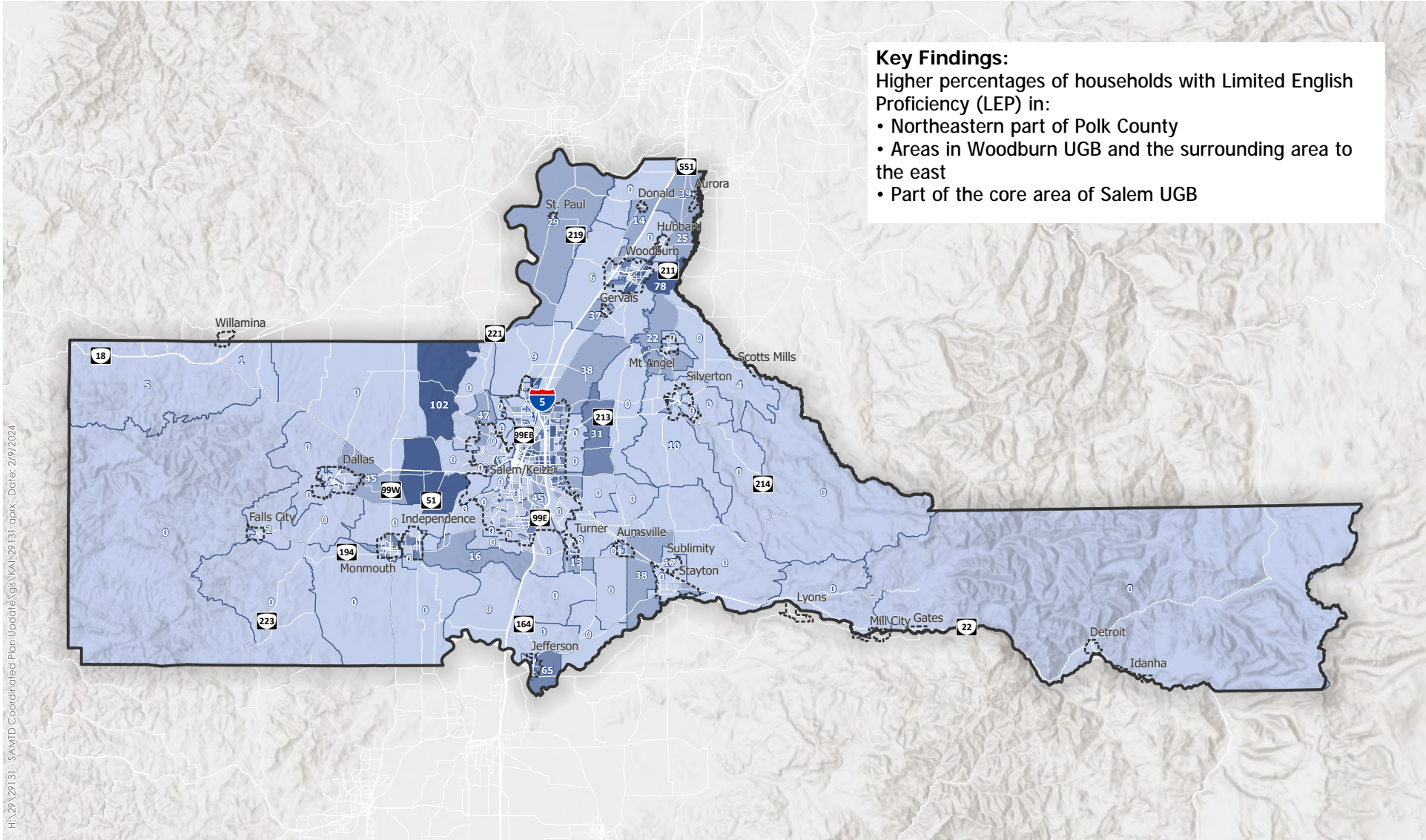
0 20 Miles

Figure 8

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

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

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**Key Findings:**  
 Higher percentages of households with Limited English Proficiency (LEP) in:

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

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

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

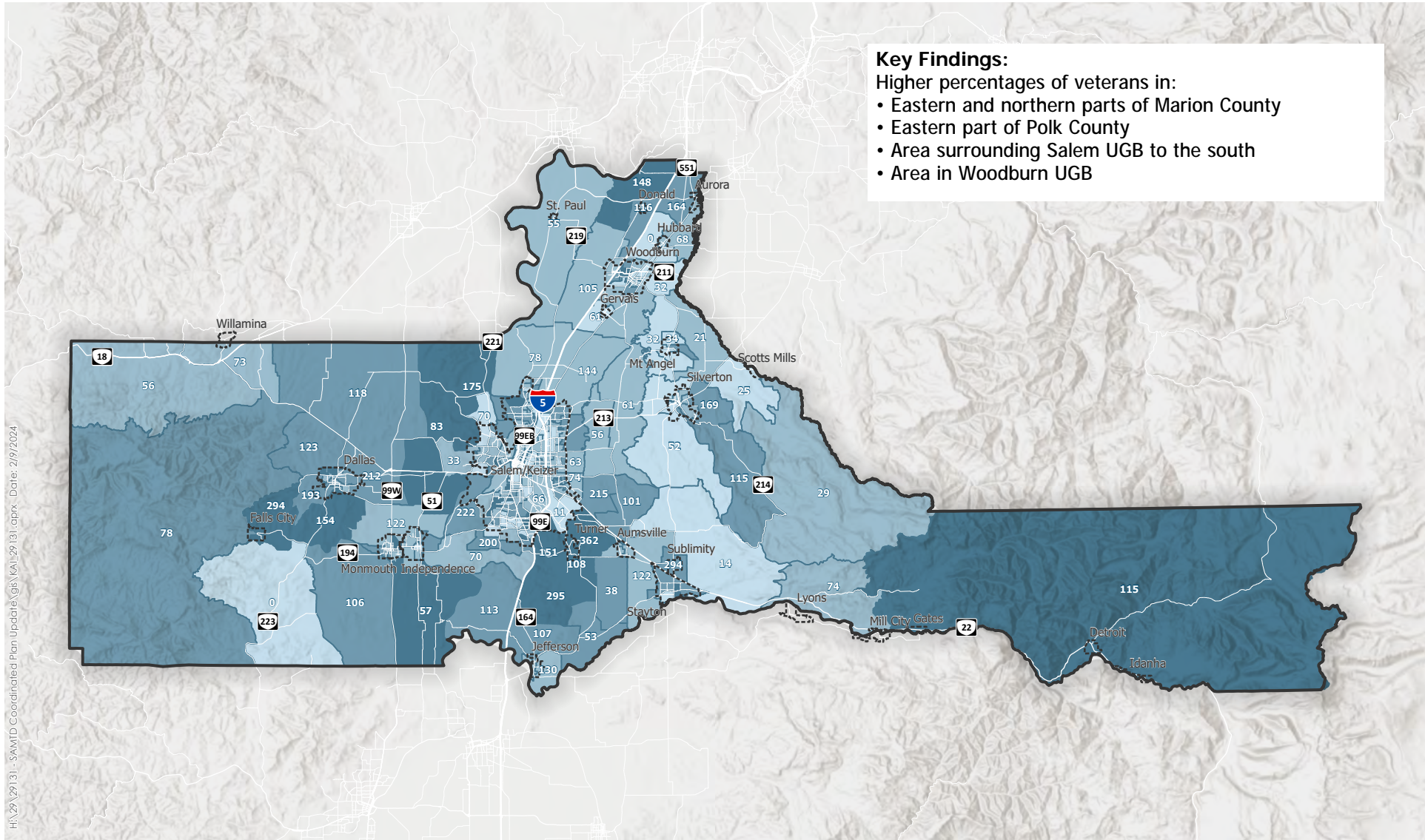
County Boundary  
 UGB

0 20 Miles

Figure 11

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

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



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

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

County Boundary  
 UGB

0 | 20 Miles

Figure 12

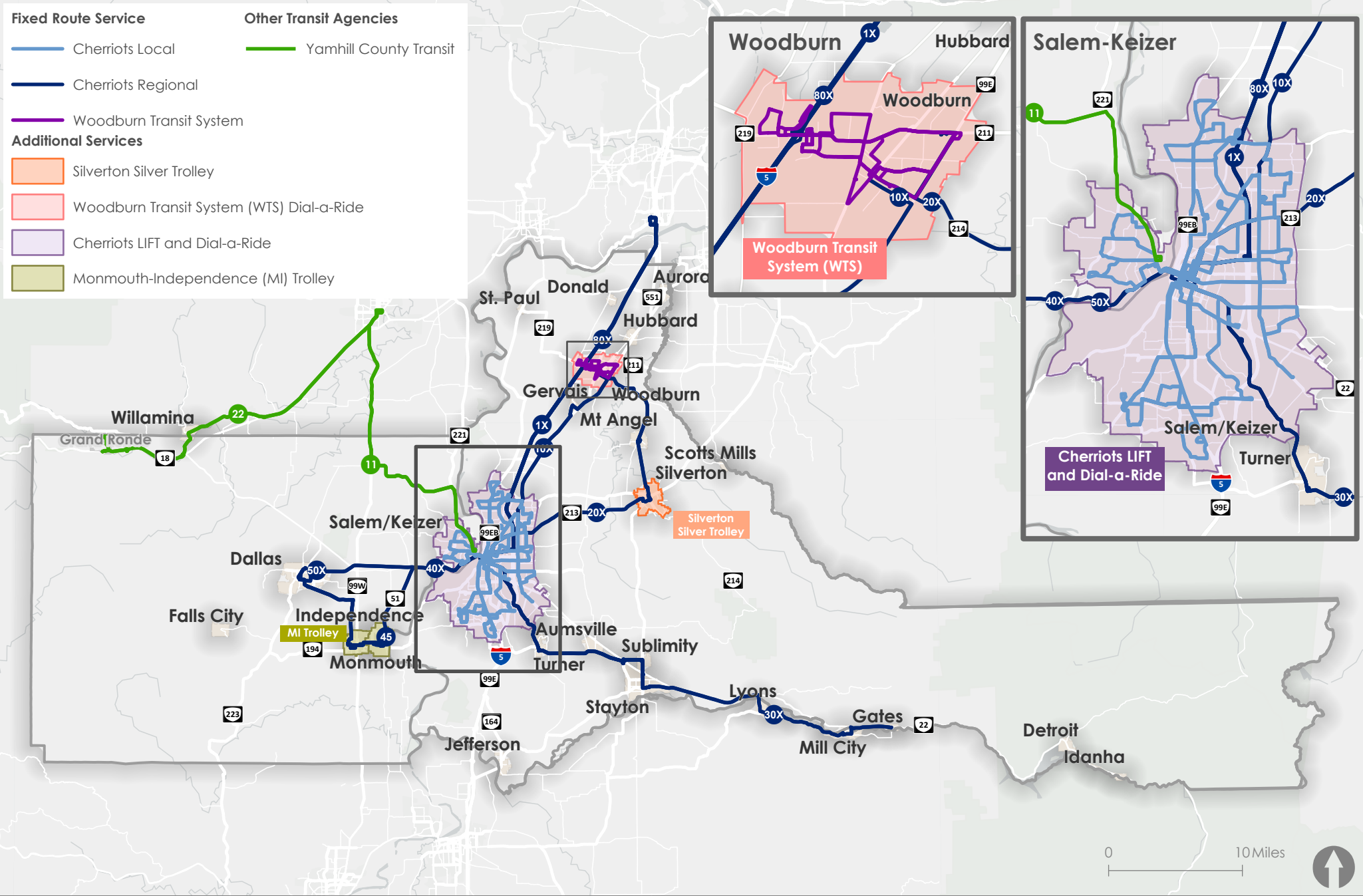
**Veteran Population  
 Marion and Polk Counties, OR**


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



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

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



 County  
 Urban Growth Bounday (UGB)

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

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

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

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

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

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



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

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

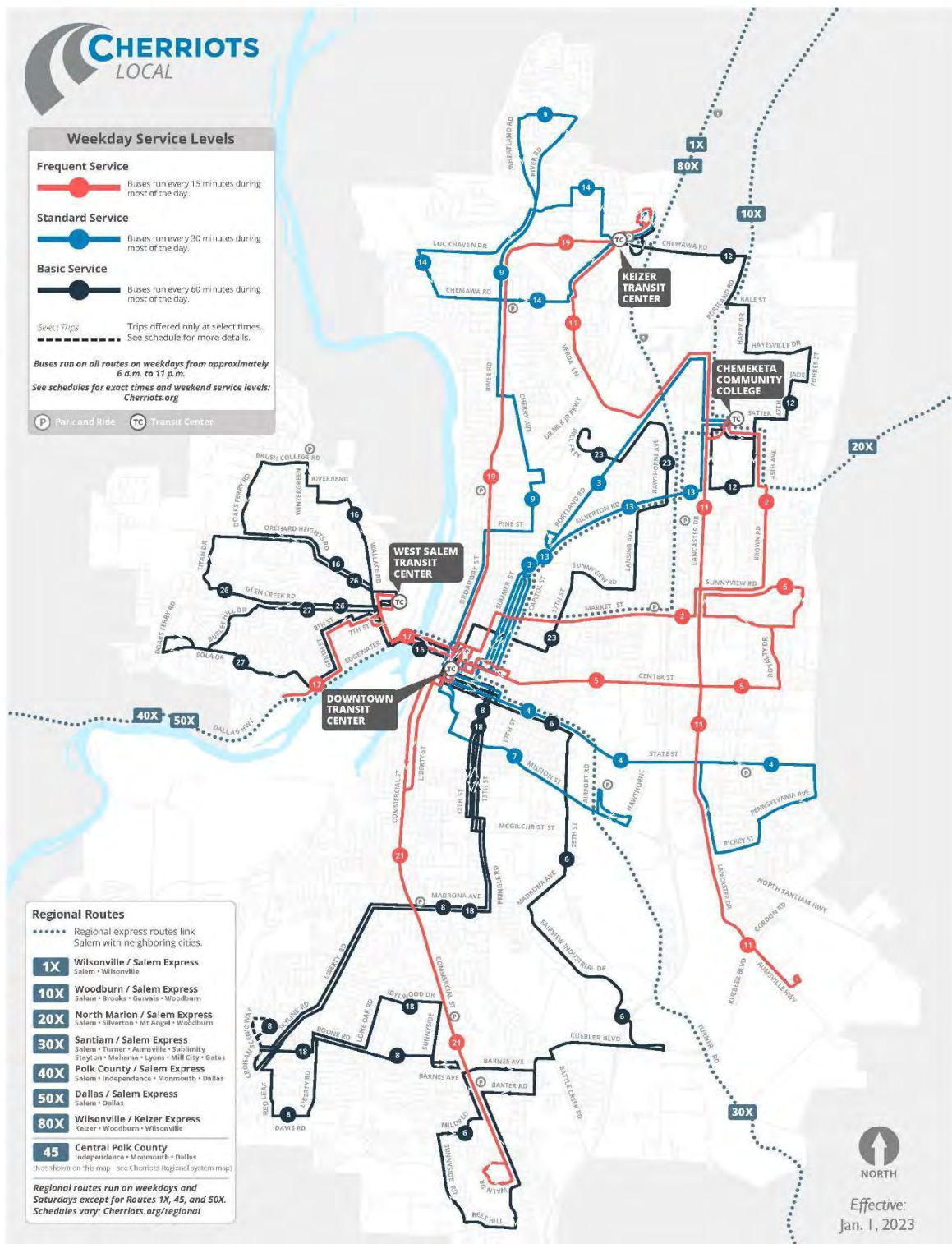
Coordinated Public Transit - Human Services Transportation Plan for Marion and Polk counties

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

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

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

Figure 15. Cherriots Local Network



## Cherriots Local

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

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

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

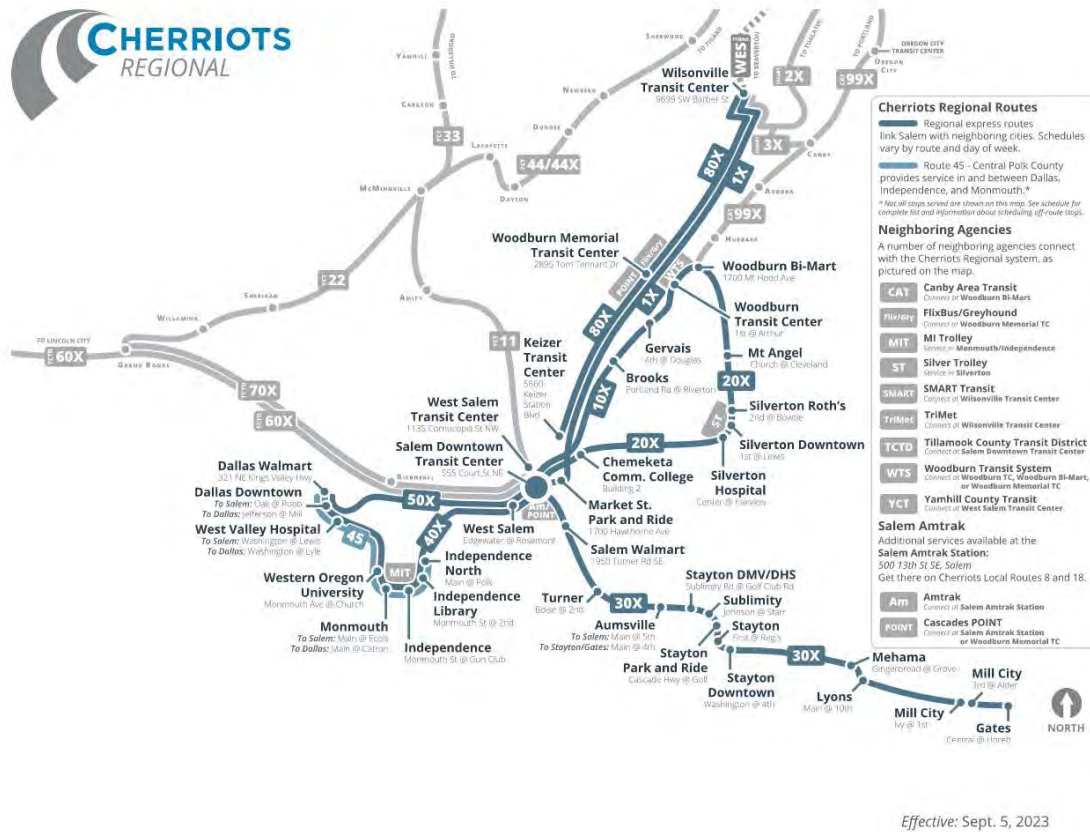
Fare Type	Fare	Reduced Fare
One-ride	\$1.60	\$0.80
Day pass	\$3.25	\$1.50
Month pass and 30-day pass	\$45.00	\$22.50
Annual pass	\$540.00	\$270.00
Universal LIFT Month Pass	\$90.00	
Youth (0-18)	Free	Free

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

## Cherriots Regional

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

Figure 16. Cherriots Regional Network



## Cherriots LIFT

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

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

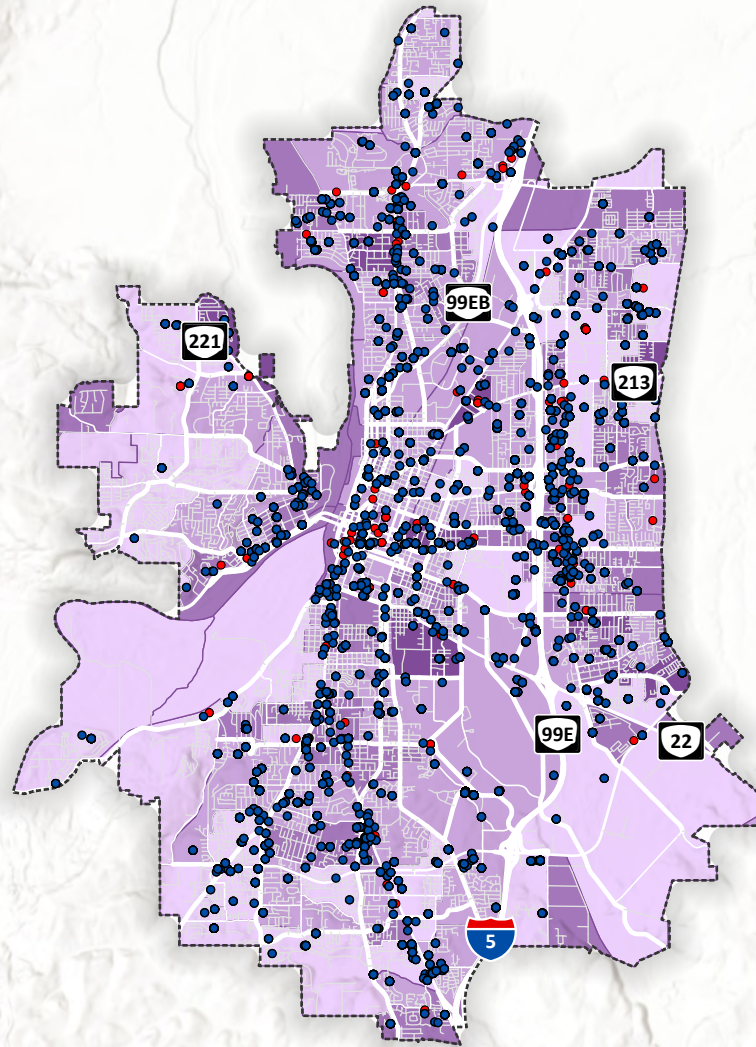
Cherriots Shop and Ride includes a dial-a-ride service and shopper shuttle for seniors aged 60 and over, and individuals with disabilities. Applications are not required. The dial-a-ride service picks up individuals at their homes and can take them to any location within the Salem-Keizer UGB. Eligible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

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





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




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

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



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

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

-  Origins
-  Destinations
-  Salem/ Keizer UGB

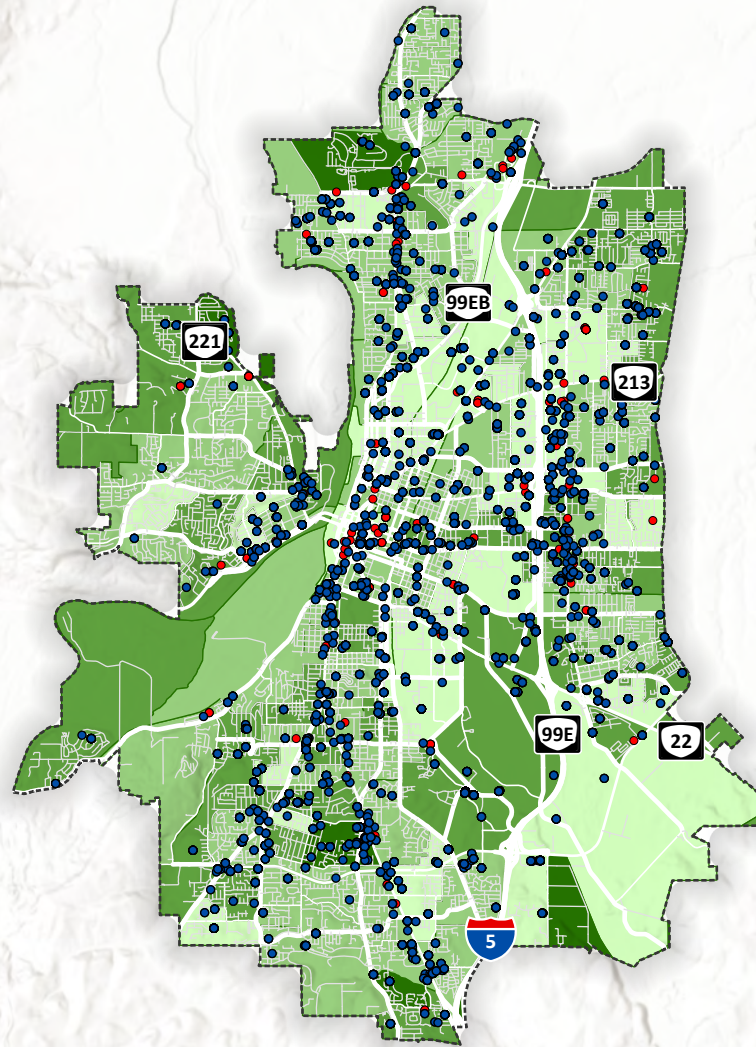
0 4.5 Miles



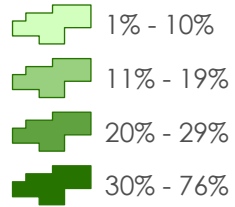
**Origins and Destinations for Cherriot's LIFT Customers and Population with Disabilities Salem/ Keizer, OR**

Figure 17

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



- Origins
- Destinations
- ▭ Salem/ Keizer UGB



Figure 18

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



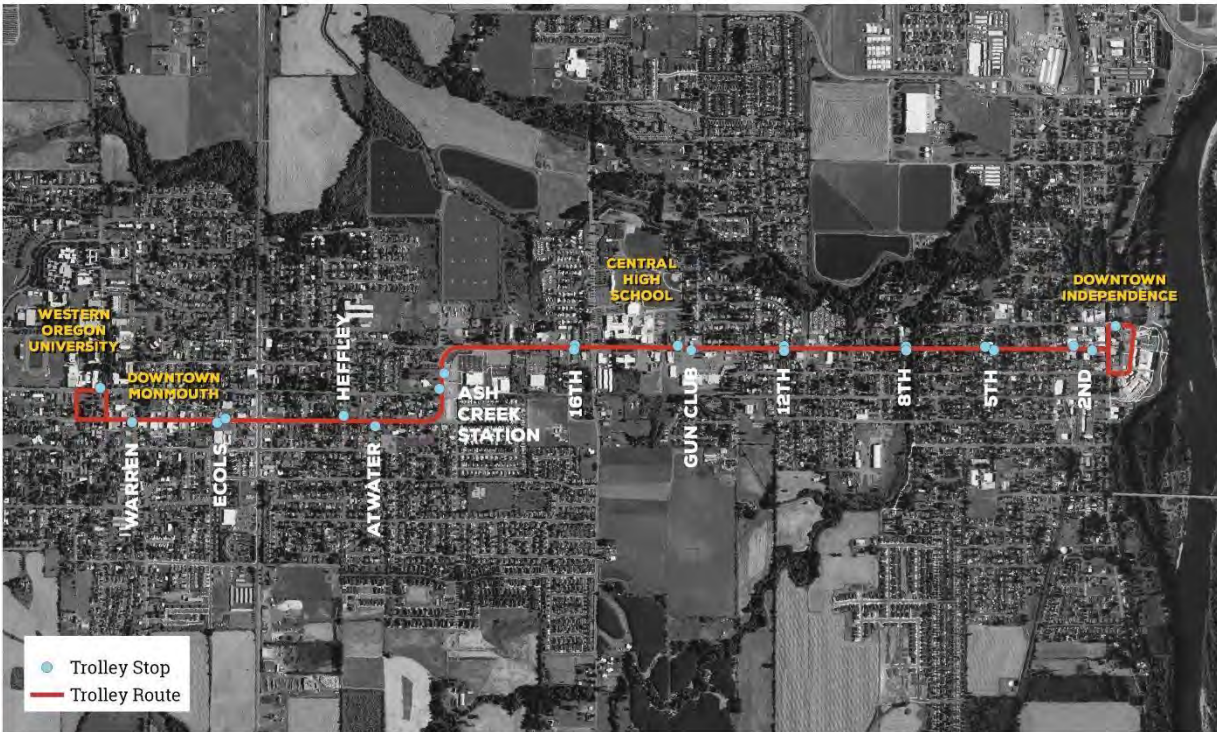




passengers up to three-quarters of a mile from the regular route path. Reservations for deviations must be made at least 24 hours in advance by calling the Cherriots call center.

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

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




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## Salem Health (West Valley Hospital)

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

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## Garten Services Work Site Van

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

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

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## Legacy Silverton Medical Center CareVan

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

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

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## Other Transportation Services

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Other transportation services in Marion and Polk counties include:

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

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

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

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

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

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

## **Yamhill County Transit**

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

## **Amtrak**

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

## **Greyhound**

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

## **FlixBus**

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

## **Cascades POINT**

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

## **Disabled American Veterans Transportation**

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

## CHAPTER 4. PUBLIC OUTREACH

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

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### Provider Input

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

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

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### Public Outreach Takeaways

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

#### **Involvement Event Takeaways**

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

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

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

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

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

## Survey Results

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

### Desired Improvements:

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

### Existing Rider Use

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



### Non-Rider Characteristics

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

### Challenges and Value of Transportation Services

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

### Demographics and Other Information

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

## CHAPTER 5. GOALS AND OBJECTIVES

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

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

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

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

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

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

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

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SAMTD Strategic Plan Core Areas: Community Value and Customer Satisfaction

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

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

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

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

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

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

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

## CHAPTER 6. NEEDS

This section presents a list of identified unmet public transportation needs as described from the stakeholder workshops, a survey that went to local transit service providers and social service agencies from September to November 2023, and applicable continued needs from the Cherriots 2019 Coordinated Plan. These needs are shown by category, and are not prioritized. Service decisions should be made using the prioritization shown in Chapter 7, and are contingent on available resources.



### Transportation Service Needs

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

- Youth, especially for grades 9 through 12
- People who are unable to schedule service in advance
- People who are unable to accommodate lengthy trip times
- People who attend addiction counseling/group therapy services in Polk County
- Enhance volunteer-based carpool or vanpool programs, especially those that provide medical services



## Infrastructure Needs

- Enhance accessibility of stops and vehicle fleet, especially on fixed routes, to meet a range of physical needs of riders and right-sizing of fleet
  - Improve bus stop amenities
  - Improve accessibility at bus stops (e.g. ADA-compliant curb ramps, level sidewalks)
  - Provide covered bus shelters, lights, and trash receptacles
  - Enhance signage for bus stops and shelters
- Improve pedestrian accessibility
  - Enhance crosswalks near bus stops
  - Complete gaps in sidewalk network
  - Locate stops where pedestrian access is available/ comfortable
- Improve bicycle accessibility
- Consider nearby activity centers, such as senior centers, medical centers, and schools where accessibility needs may vary stop and access needs
- Establish small transit centers in communities without a transit center or major transit stop with a shelter



## Coordination and Organizational Needs

- Coordinate services that cross jurisdictional and transit provider service area boundaries
  - Reduce duplication of services
  - Maintain and enhance service connectivity among local operators
- Coordinate services among social service agencies, senior centers, medical facilities, employers, and other organizations to share information about local transportation options, training opportunities, and other information
  - Santiam Hospital, Salem Health, West Valley Hospital, Legacy Silverton Medical Center, Garten Services, etc.
- Establish central dispatch for transportation services
  - Apply technological solutions to facilitate coordination efforts
- Explore faresharing across systems to reduce rider costs and promote transit use



## Marketing, Customer Service, and Outreach Needs

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



## Technology Needs

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

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



## Capital and Funding Needs

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

## CHAPTER 7. PRIORITIES AND STRATEGIES

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

### Priorities

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

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



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## Strategies

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



### Transportation Service Strategies

- Sustain current service levels, considering equity and service performance
- As funding allows, implement the Long Range Transit Plan (LRTP) and other recent plans
- Follow Cherriots Service Guidelines to address gaps in public transit services
- Identify areas with the greatest need for additional or enhanced transit services and apply new funding towards these identified needs
- Increase weekend and holiday service on Cherriots Local and Cherriots Regional fixed routes
- Extend morning and evening hours on fixed routes during the weekdays
- Improve frequencies where service is too infrequent
- Increase capacity of existing volunteer carpool or vanpool programs by increasing the fleet of accessible vehicles for community-based services
- Explore options for microtransit, circulator, feeder route, and flexible route or dial-a-ride services
- Improve regional connections between modes and service providers, especially connections to unserved or underserved communities
- Expand service coverage to more basic needs destinations and destinations essential to life
- Where allowable, explore partnerships with Transportation Network Companies (TNCs) such as Uber or Lyft to provide first-mile/last-mile transportation for customers that can utilize fixed-route transit for part of their trip
- Explore opportunities to expand Get There Oregon or develop a new platform for ride-matching for seniors and people with disabilities



### Infrastructure Strategies

- Review existing pedestrian plans in Marion and Polk counties for opportunities and funding sources to improve sidewalk and pedestrian infrastructure and shared use mobility options that provide first-and-last-mile connectivity to transit destinations
- Prioritize bus stop locations needing improvements

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



## Coordination and Organizational Strategies

- Develop a calendar in line with state and federal requirements for staff to periodically review the Coordinated Plan and to bring an assessment to the STIFAC to evaluate progress and make updates as needed. At the time of this writing, the Coordinated Plan is expected to be updated every four or five years.
- Coordinate with medical facilities, seniors and/or people with disabilities transportation consumers, and their representatives to optimize trip scheduling (e.g., Legacy Silverton Medical Center program, Salem Health, etc.)
- Coordinate with public and private sector organizations to identify opportunities for joint scheduling or sharing of vehicles (e.g., senior centers)
- Expand awareness of home delivery services (e.g. grocery shopping, library services) to people who stay at home to assist with “aging in place” and providing independence for people with disabilities (review the existing Age in Place program in Woodburn as a successful example)



## Marketing, Customer Service, and Outreach Strategies

- Develop and distribute information promoting travel options, counseling services, travel training, and web application-based information systems
- Coordinate with medical, social, senior center, employers, and other organizations to share information about local transportation options and training opportunities
- Increase communication and marketing efforts to make members of the public and policymakers aware of transportation options
- Encourage seniors and people with disabilities to use online trip planning tools
- Explore a fare assistance program for people whose primary barrier to using public transit is financially based
- Provide more driver training to ensure a positive, consistent customer experience by incorporating feedback from well-regarded drivers
- Expand travel training programs that cover topics such as how to use the dial-a-ride system, make transfers between transit systems and destinations, and use online tools and applications, including the electronic fare payment system

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



## Technology Strategies

- Develop and test new technologies to improve service efficiencies
- Develop or purchase open-source software to enable multiple operators to connect with a single clearinghouse for trip planning and scheduling
- Explore implementation of new technologies at bus stops such as speaking/digital schedules and electronic signs to enhance accessibility
- Work toward providing real-time information for scheduled rides and same day or on-demand scheduling
- Develop a centralized information system that can be accessed by people needing information on applicable transportation resources





## Capital and Funding Strategies



- Advocate for increased funding and seek out new and innovative funding opportunities
- Review bus inventory against route/rider needs. Seek grants that would enable “right sizing” of vehicles, that balances ridership and capacity with maneuverability and fuel efficiency
- Advocate for adequate capital replacements
- Continue to develop and implement vehicle maintenance schedules
- Review the funding application process and application materials on a biennial basis; revise to match the grant funding sources as changes are adopted by funding agencies

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

**Table 4. Needs and Strategies**

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

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

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



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

## CHAPTER 8. LOOKING FORWARD

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

Decisions made today on how best to invest in transportation options for seniors and people with disabilities will affect the future quality of life for thousands of Marion and Polk county residents. By 2025, there is expected to be approximately 34,000 more people 65 years and older in the two-county area, growing from a 13.2 percent share of the population today to a 17.9 percent share. According to the 2020 US Census, more than 14 percent of the two-county population reported a disability.

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

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

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



## APPENDIX A. PUBLIC INVOLVEMENT SUMMARY

# Public Involvement Summary

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

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

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

## Public Involvement Event Take-Aways

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

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

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

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

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

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

### ***Meeting Outcomes***

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

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

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

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

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

Two major themes were:

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

Specific comments included:

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

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

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

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

*Local*

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

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

*Regional*

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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



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

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

# Survey Results

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

Key findings from the survey are below.

## *Desired Improvements:*

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

## *Existing Rider Use*

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

## *Non-Rider Characteristics*

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

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

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

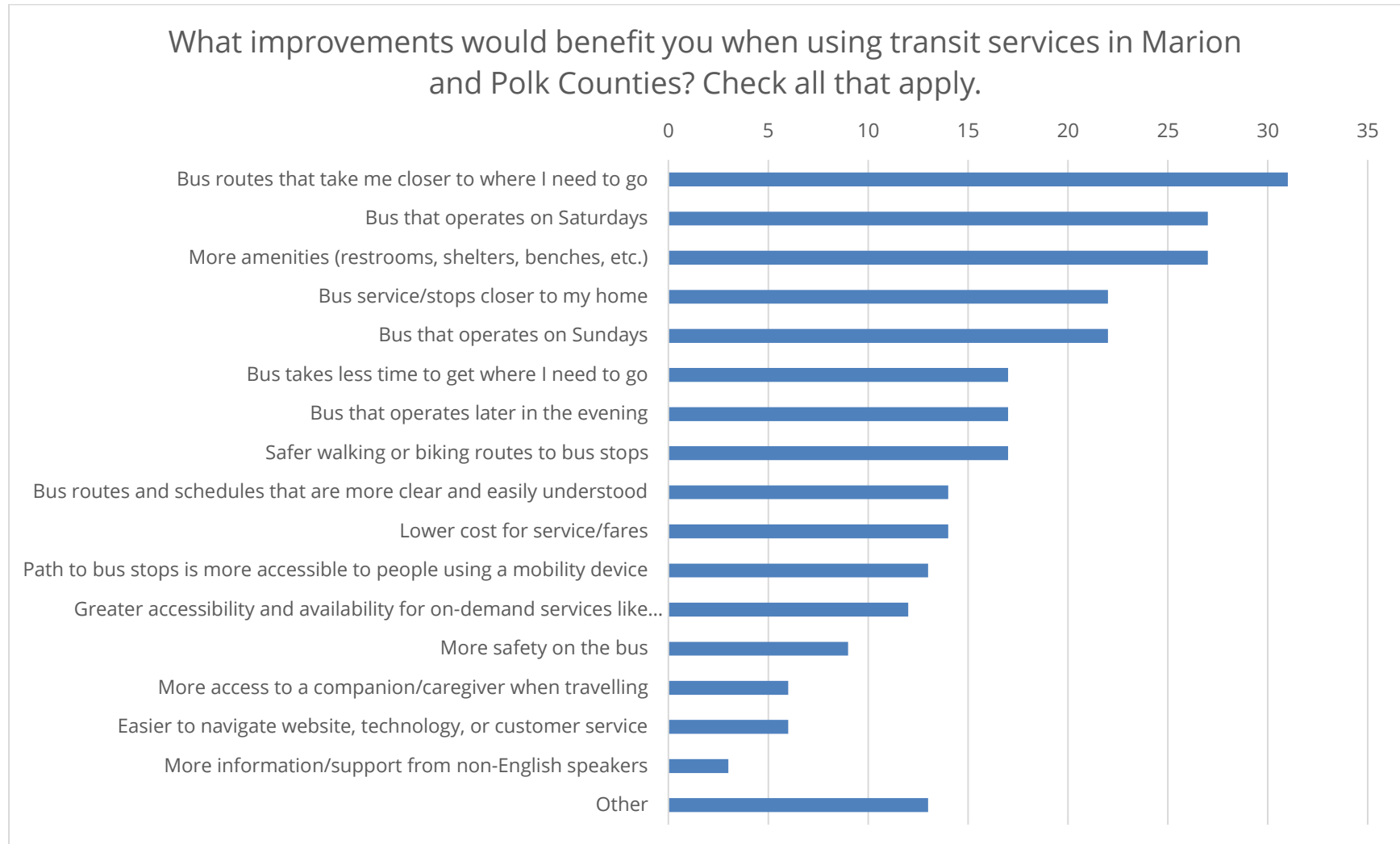
- Several open-ended questions asked riders and non-riders about their challenges and what they value in transportation services. Key themes included:
- Desire for more service frequency and covered shelters, especially on regional routes.
- Respondents valued the friendly drivers and staff, availability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

#### *Demographics and Other Information*

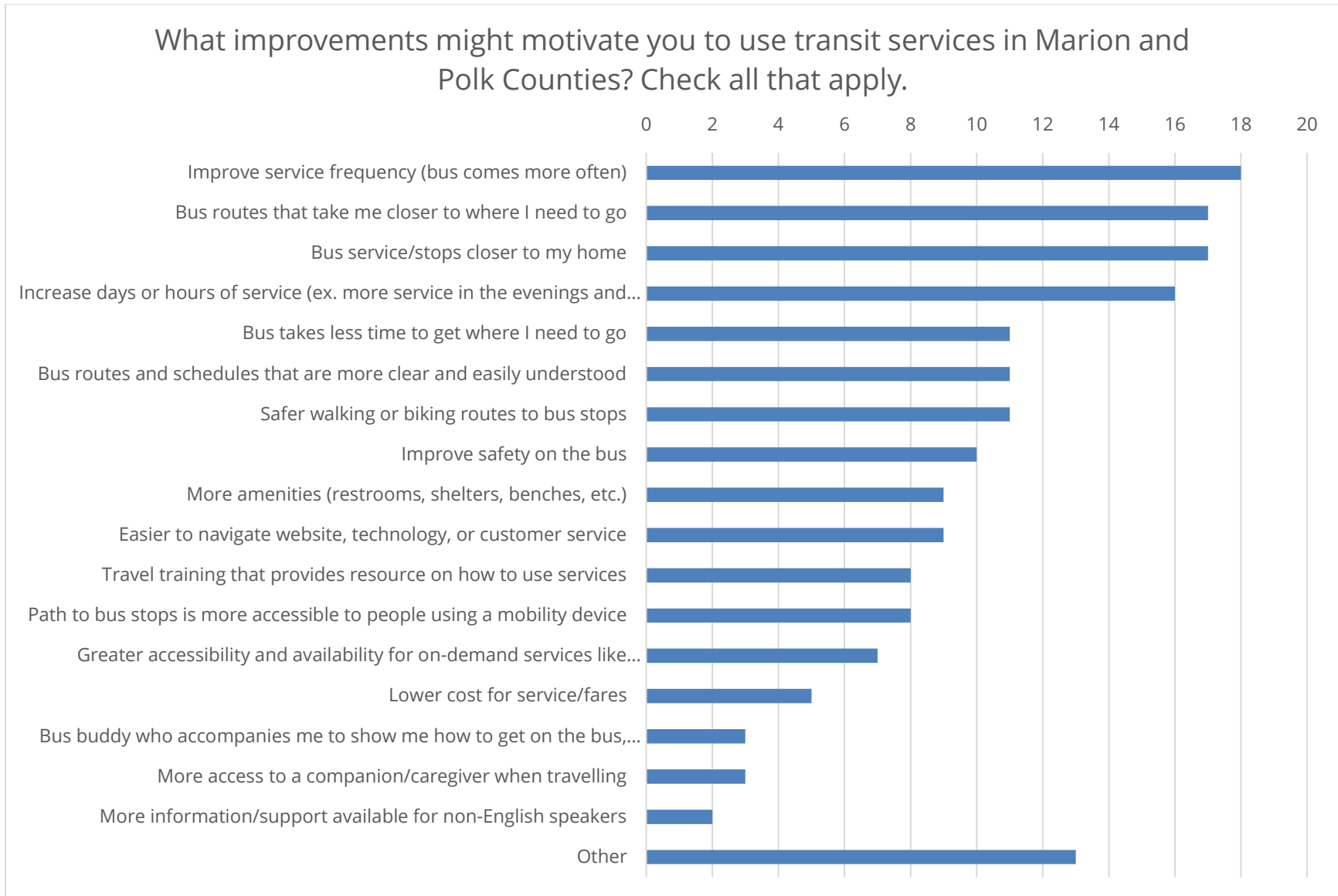
- Most respondents indicated they lived in a city or town, with top areas they frequent being primarily Salem and Keizer. Many respondents indicated they travel to Dallas, Silverton, Independence, Stayton, Monmouth, Mount Angel, and Woodburn as well.
- Overall, participants identify as white (86%), female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

## Desired Improvements

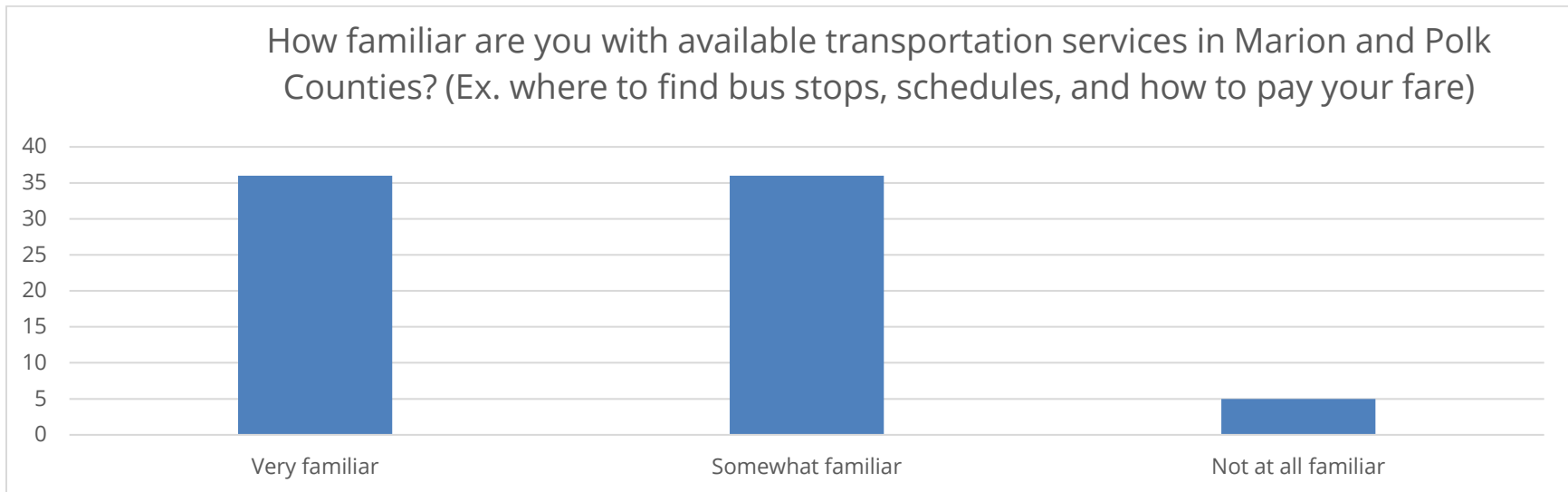
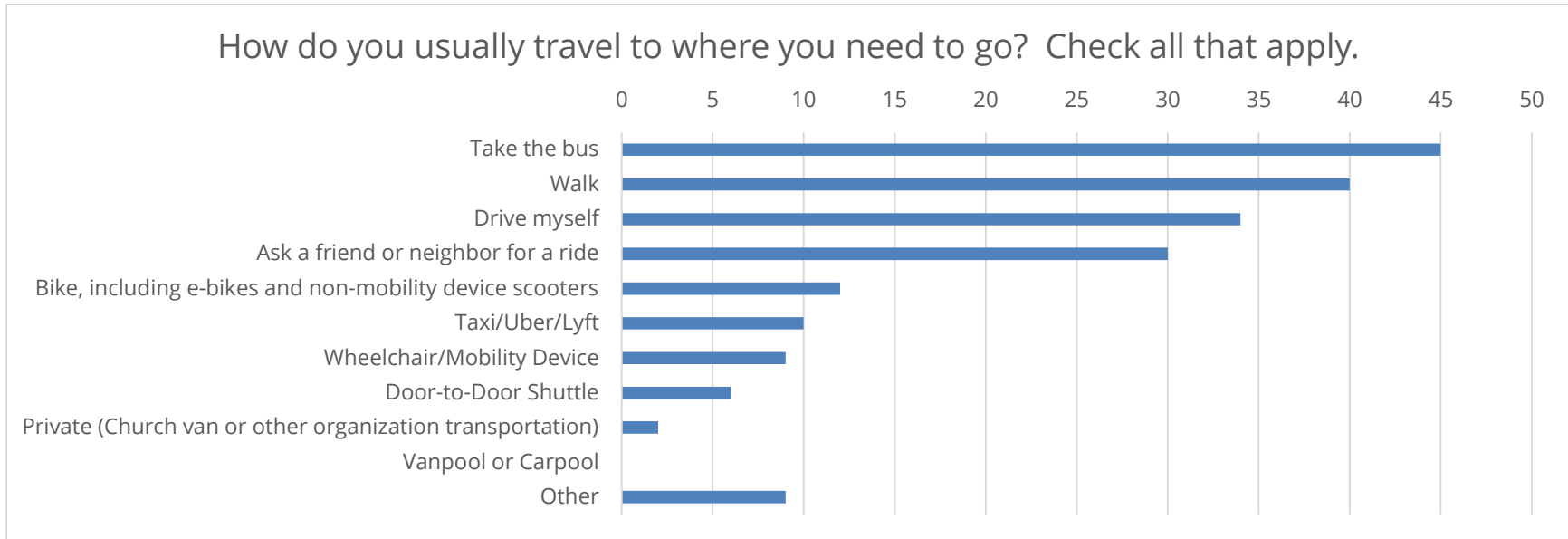
### Transit and Transportation Service Riders



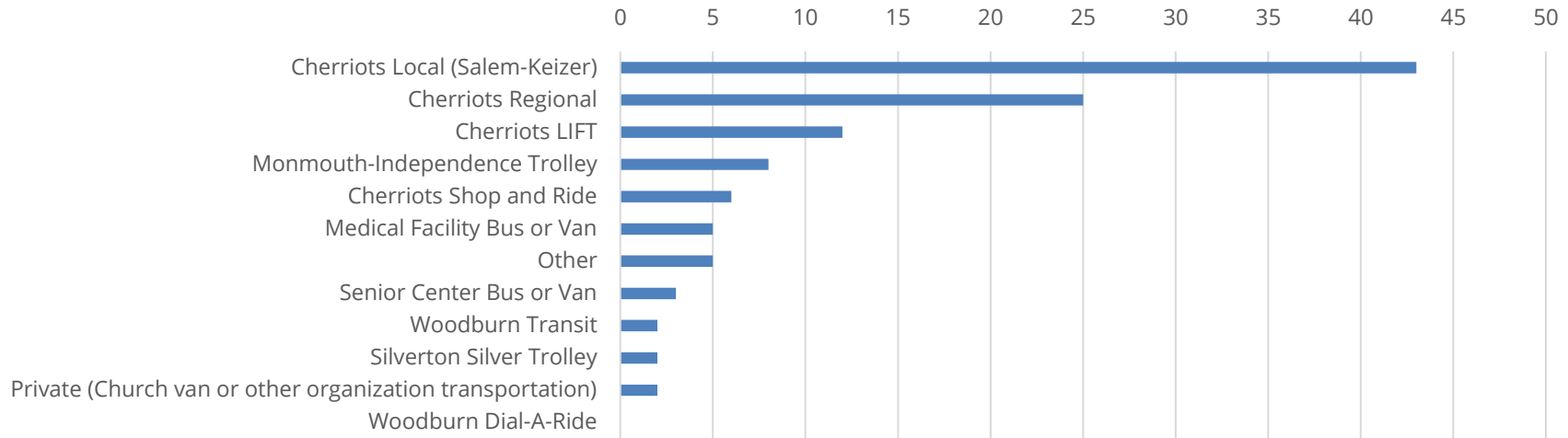
Non-Riders



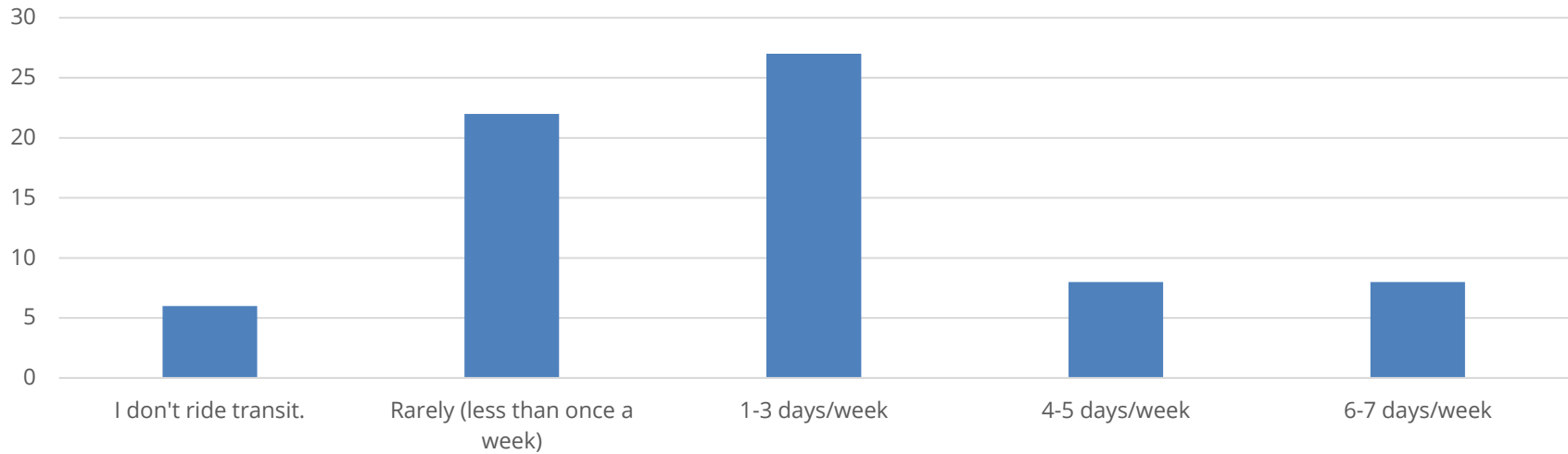
**Existing Rider Use**



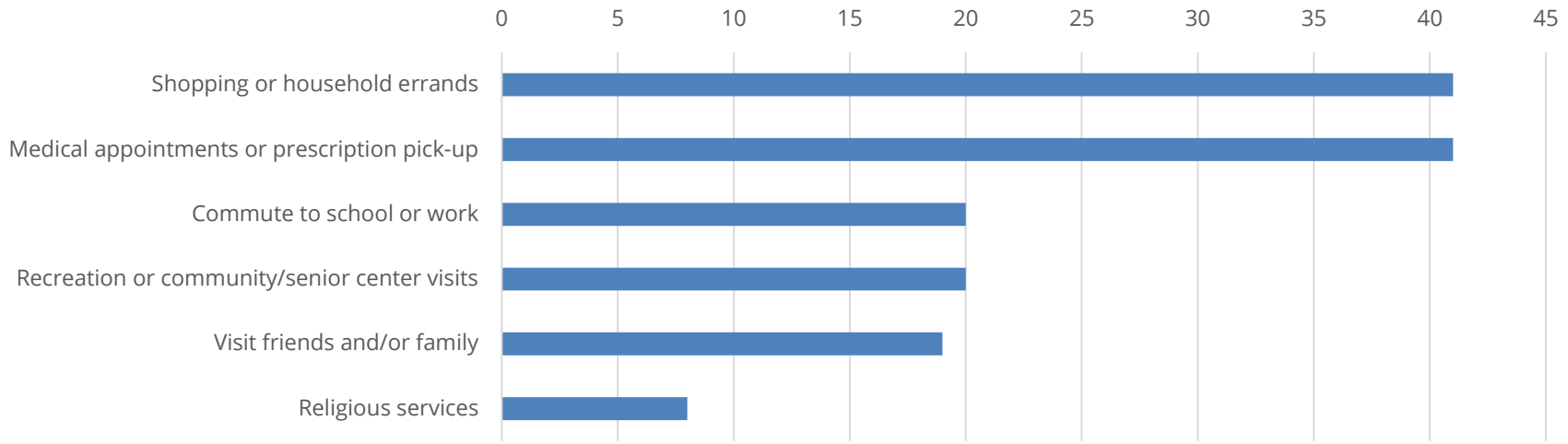
### What transit services do you use? Check all that apply.



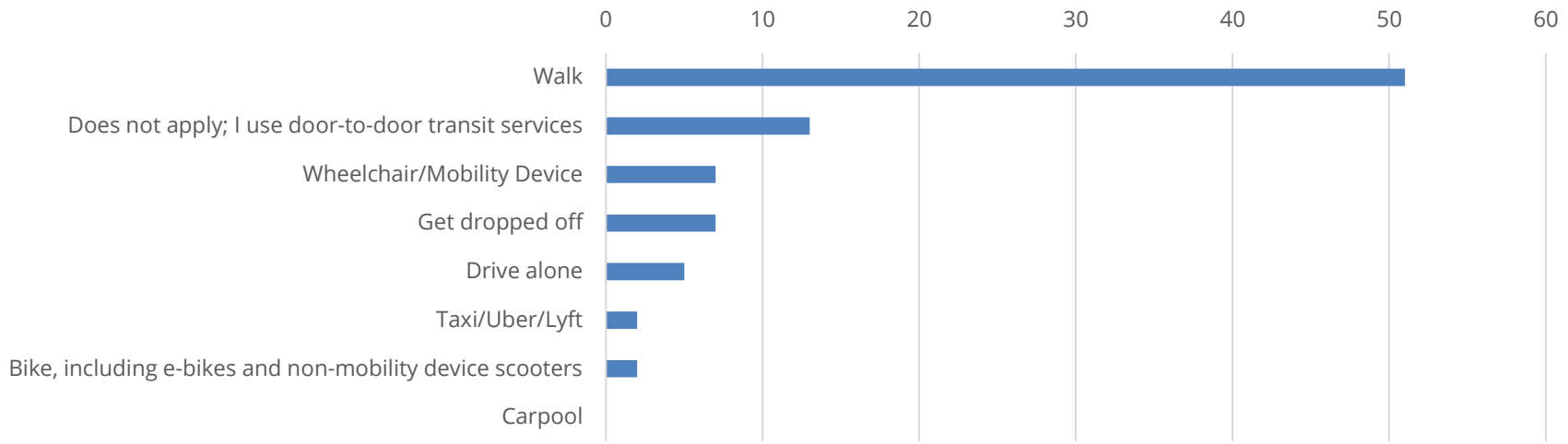
### How often do you use transit services?



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

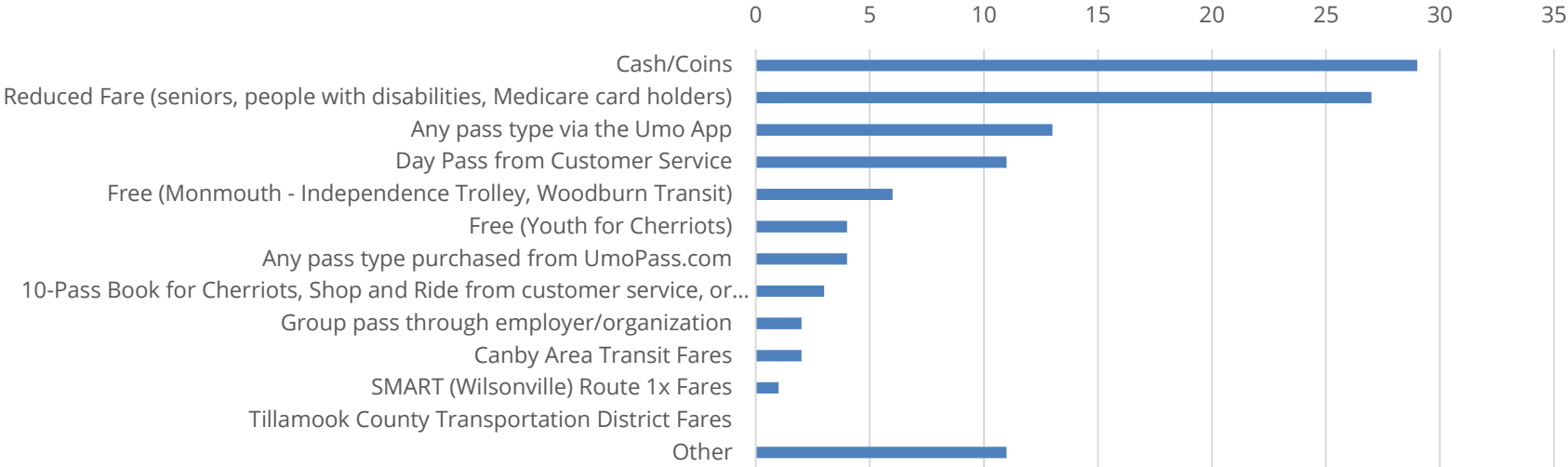


### How do you usually get to and from the bus stop? Check all that apply.

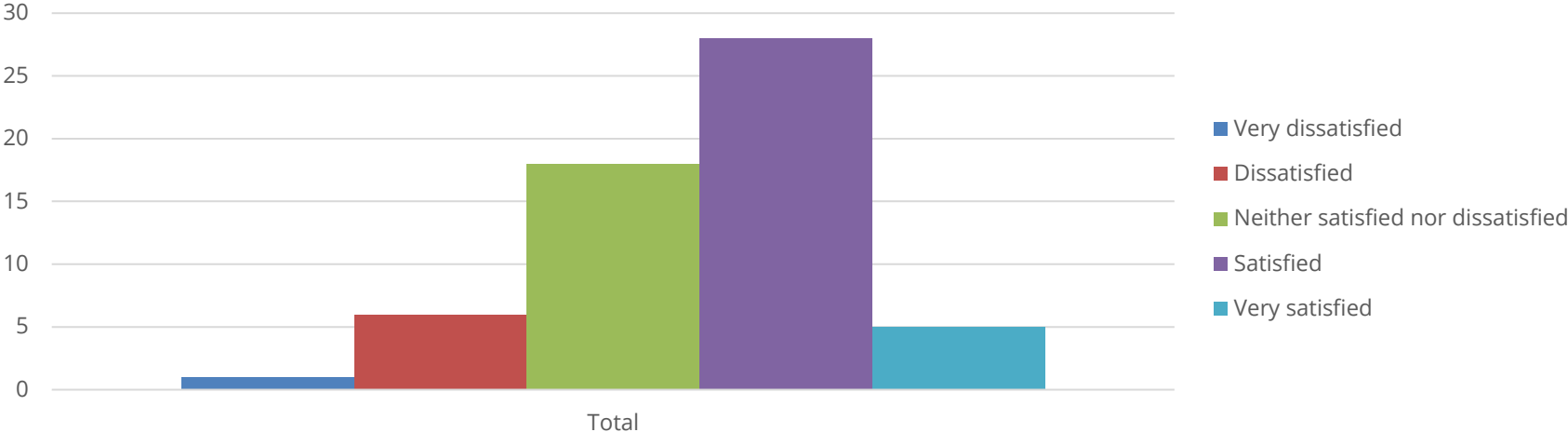




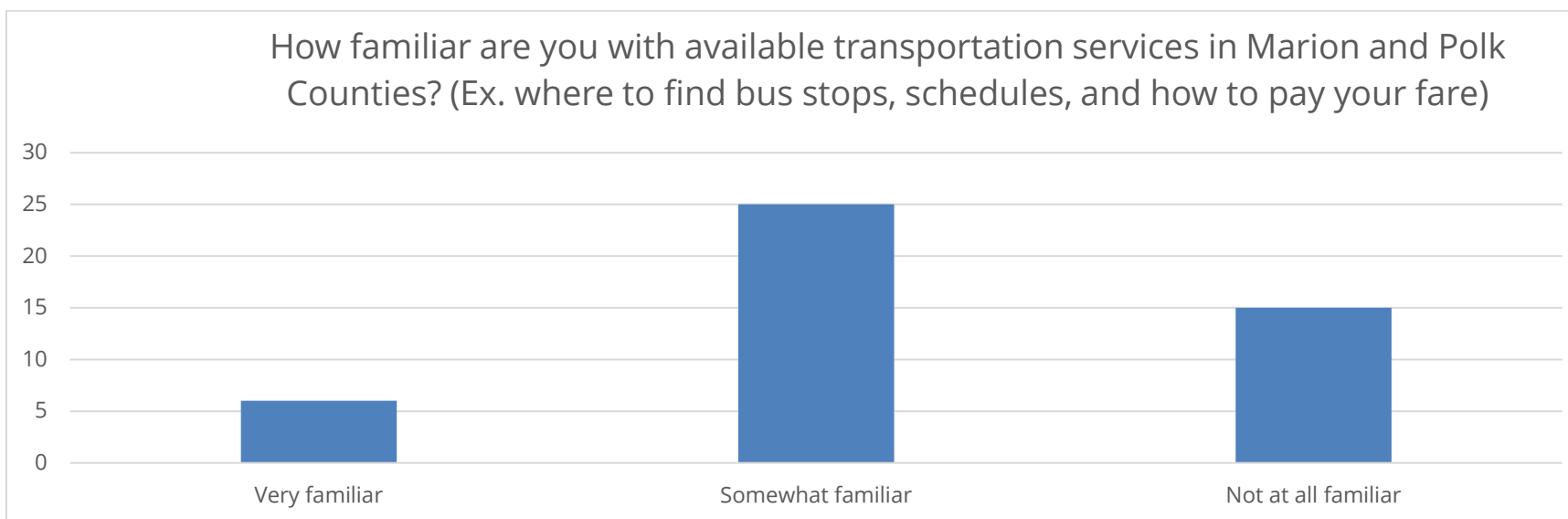
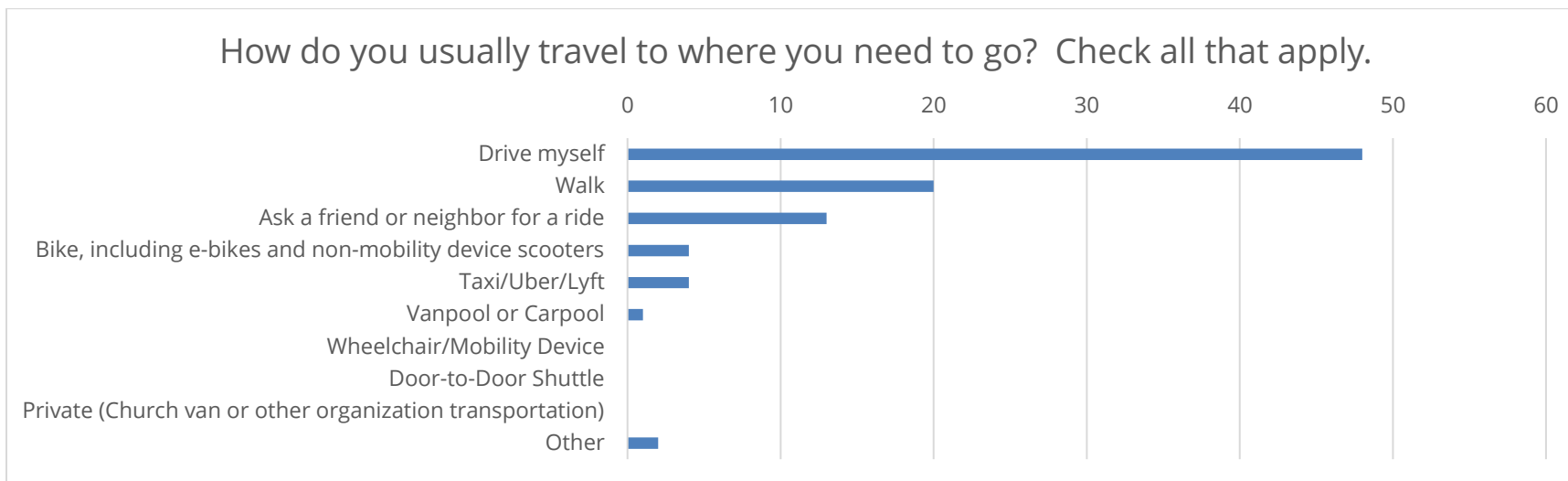
### What type of fare payment(s) do you use? Check all that apply.



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

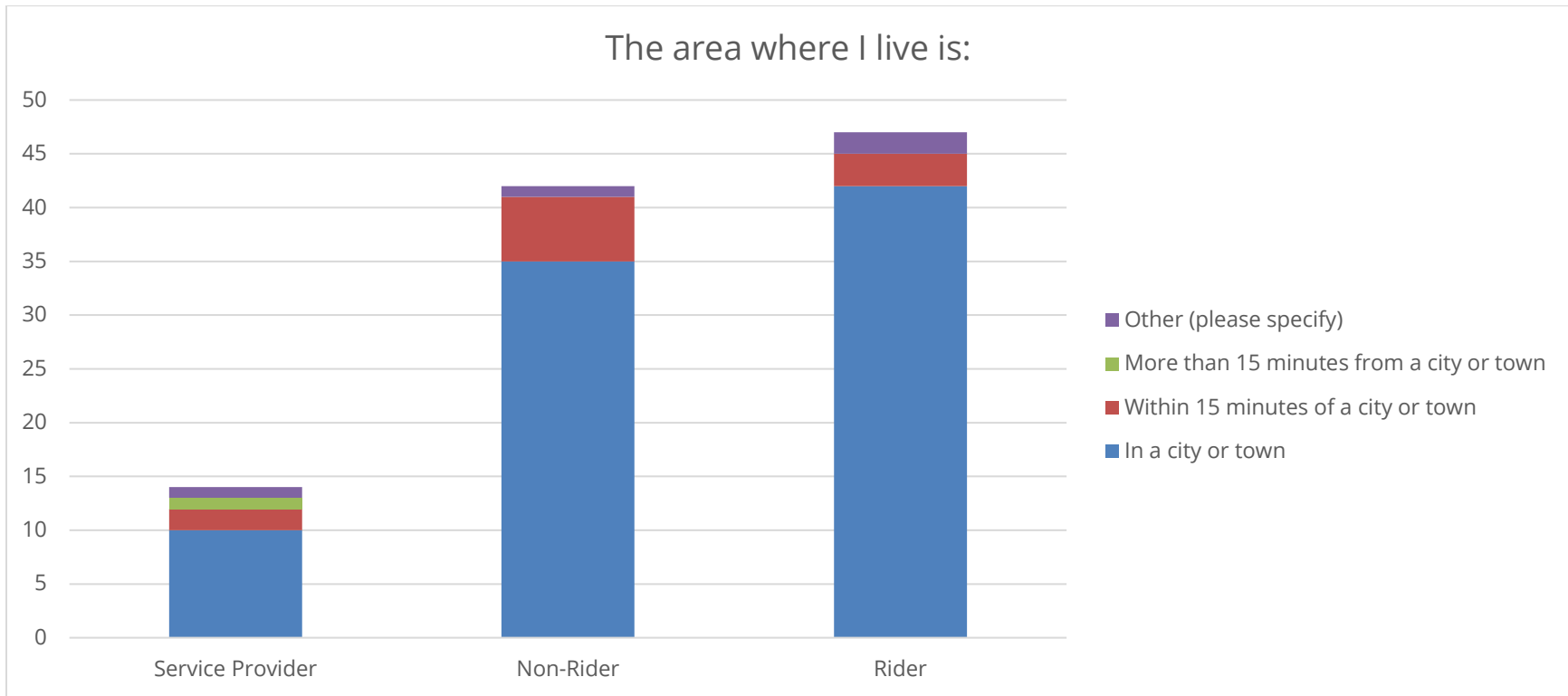


### Non-Rider Characteristics

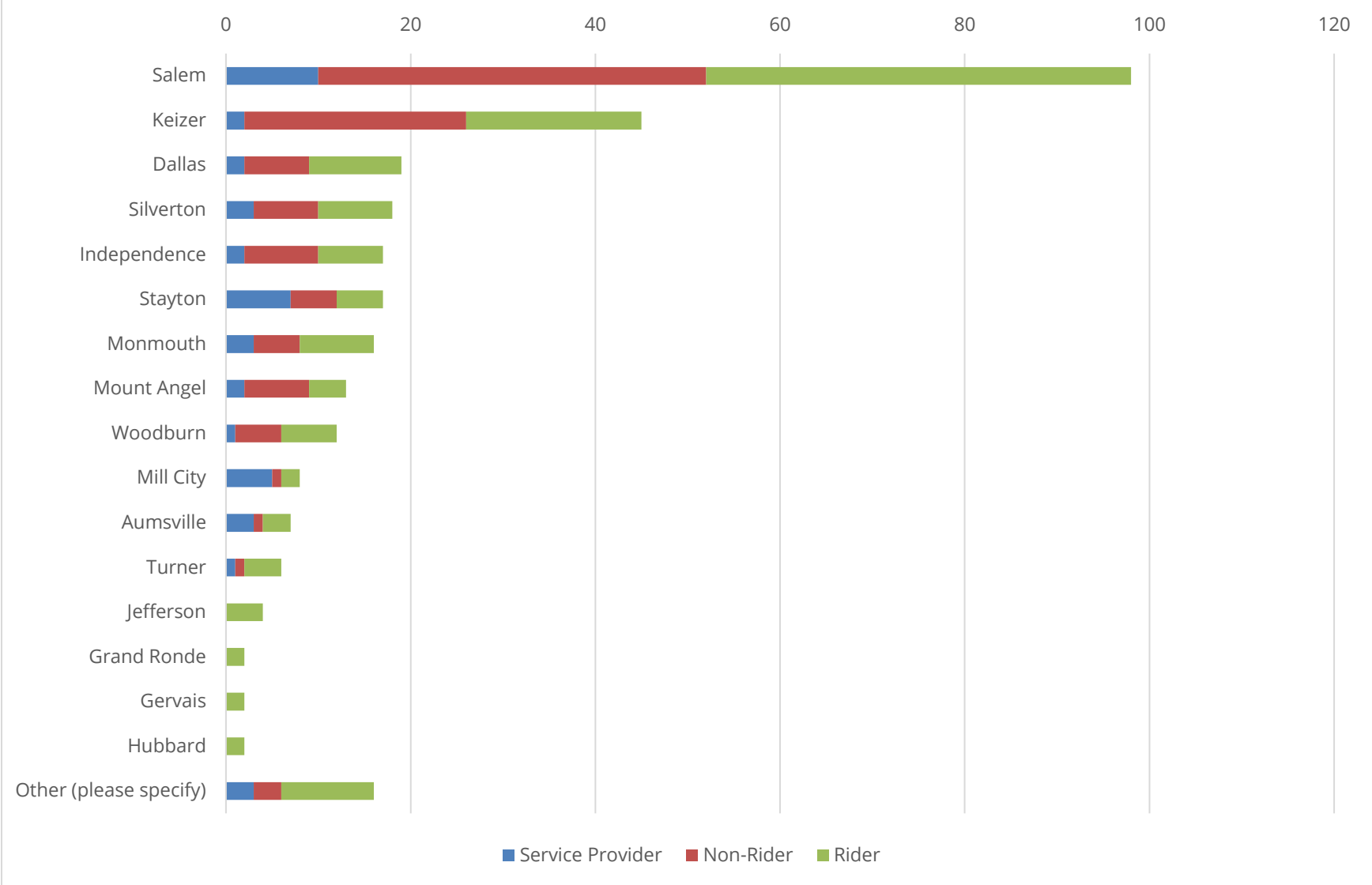


### ***Demographics and Other Information***

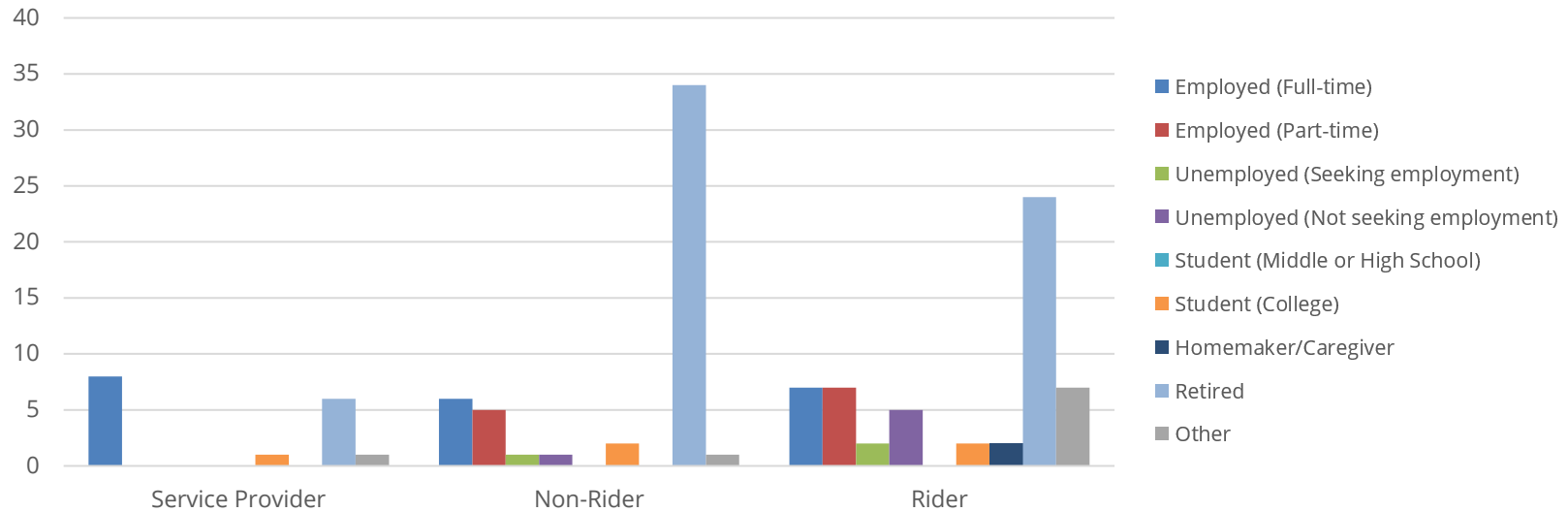
<b>Home Location</b>	<b>Number of Participants</b>
Dallas	2
Detroit	1
Falls City	1
Lake Oswego	1
Lyons/Fox Valley	1
Mehama	1
Mill City	2
Monmouth-Independence	9
Mt. Angel	1
Salem-Keizer	71
Silverton	10
Stayton	1
Wilsonville	1
Outside Oregon	2



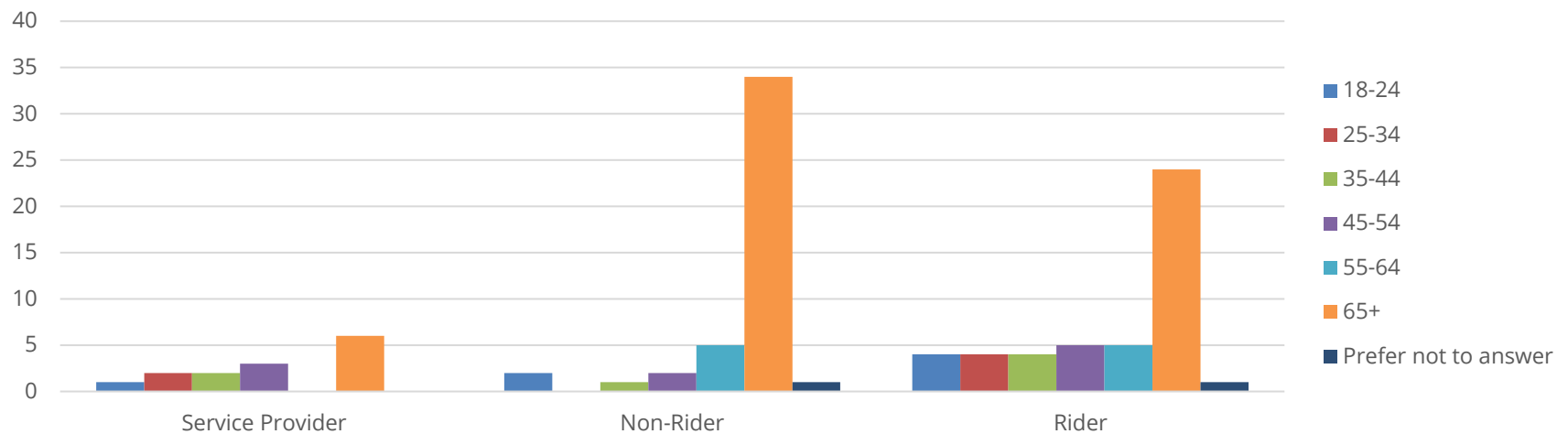
The top 3 areas where I most often frequent (home, work, school, appointments, errands, etc.) are:

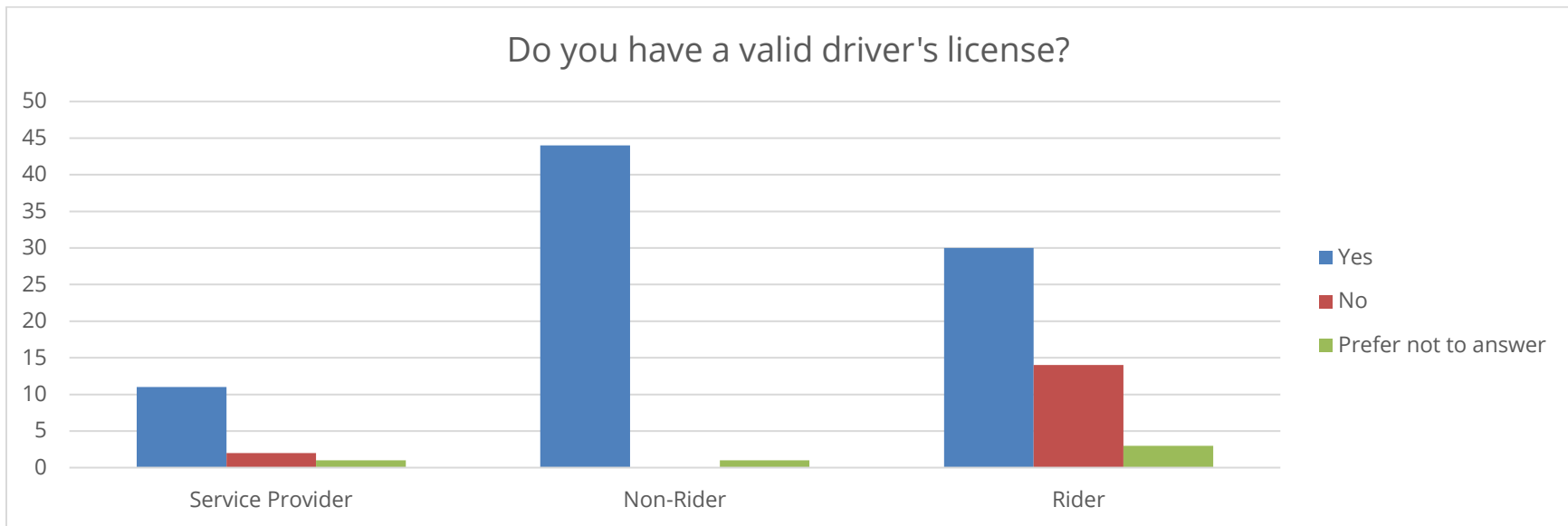
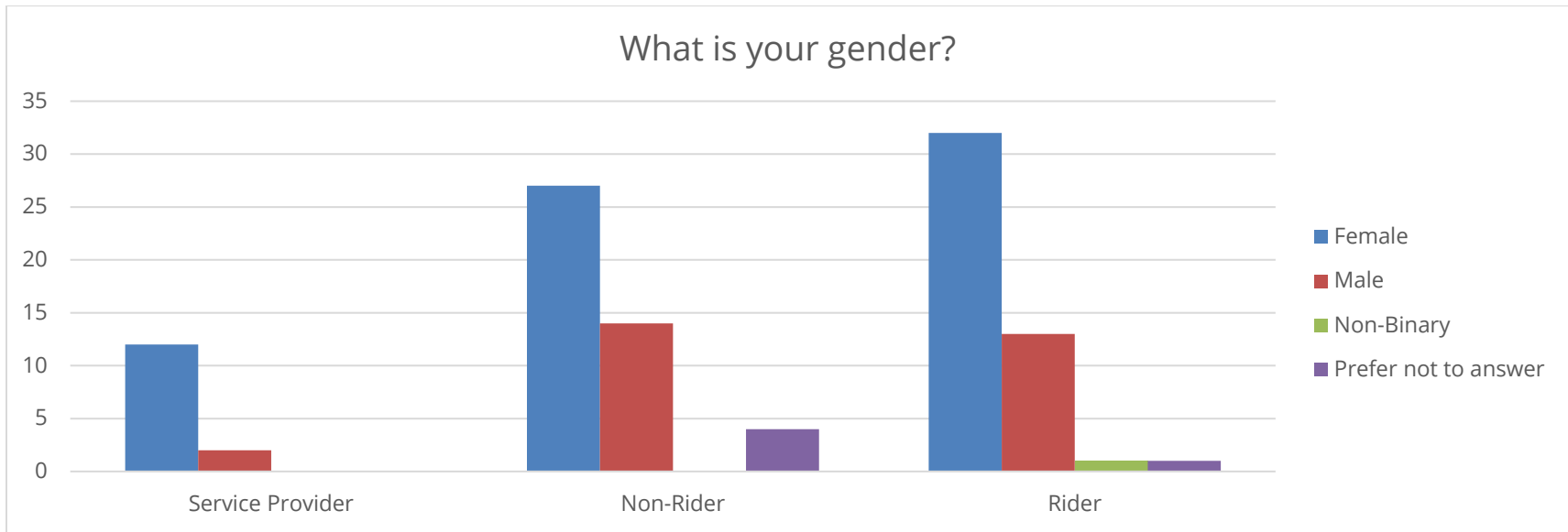


### Which of the following describe you? Check all that apply

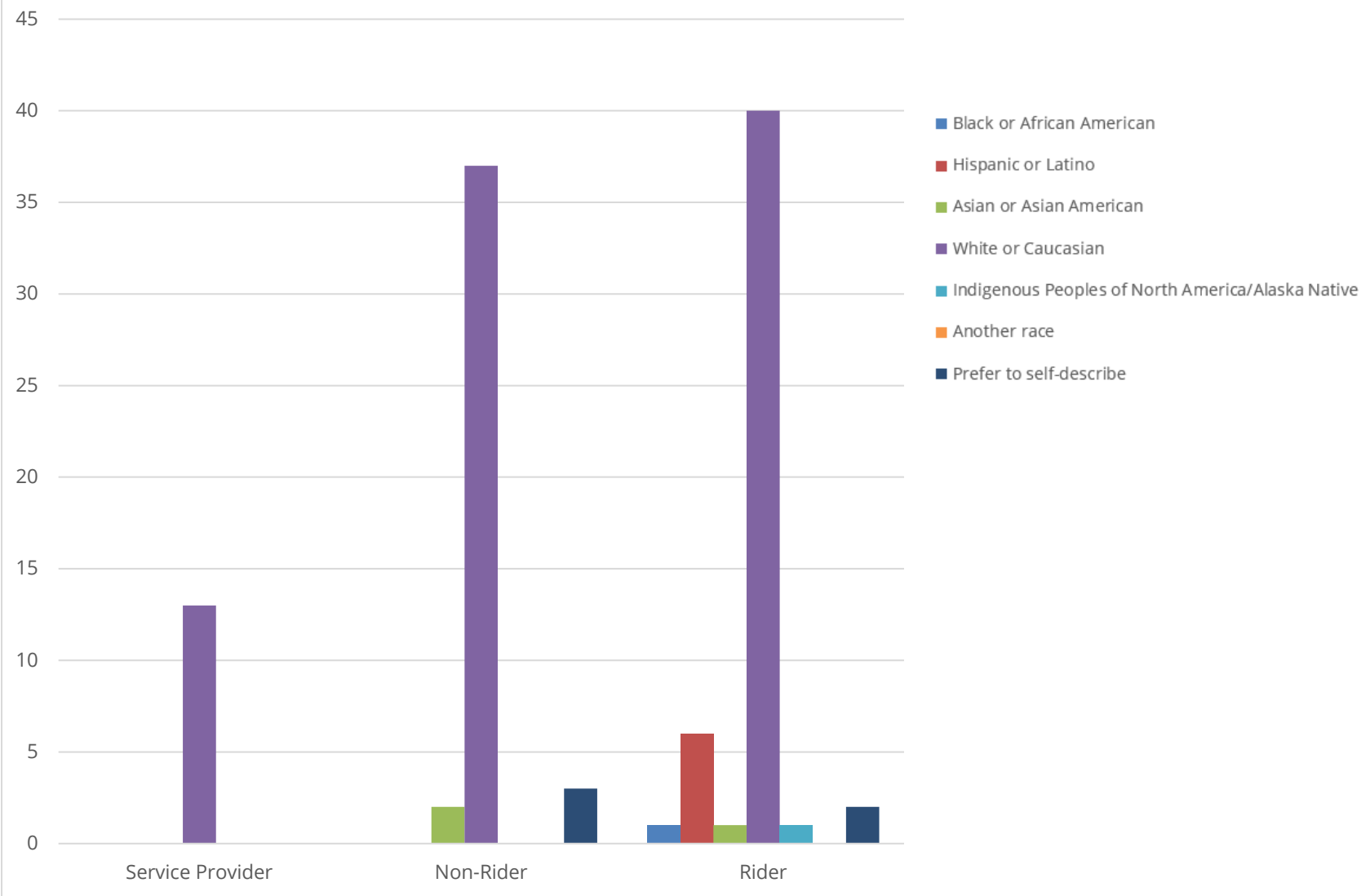


### What is your age range?



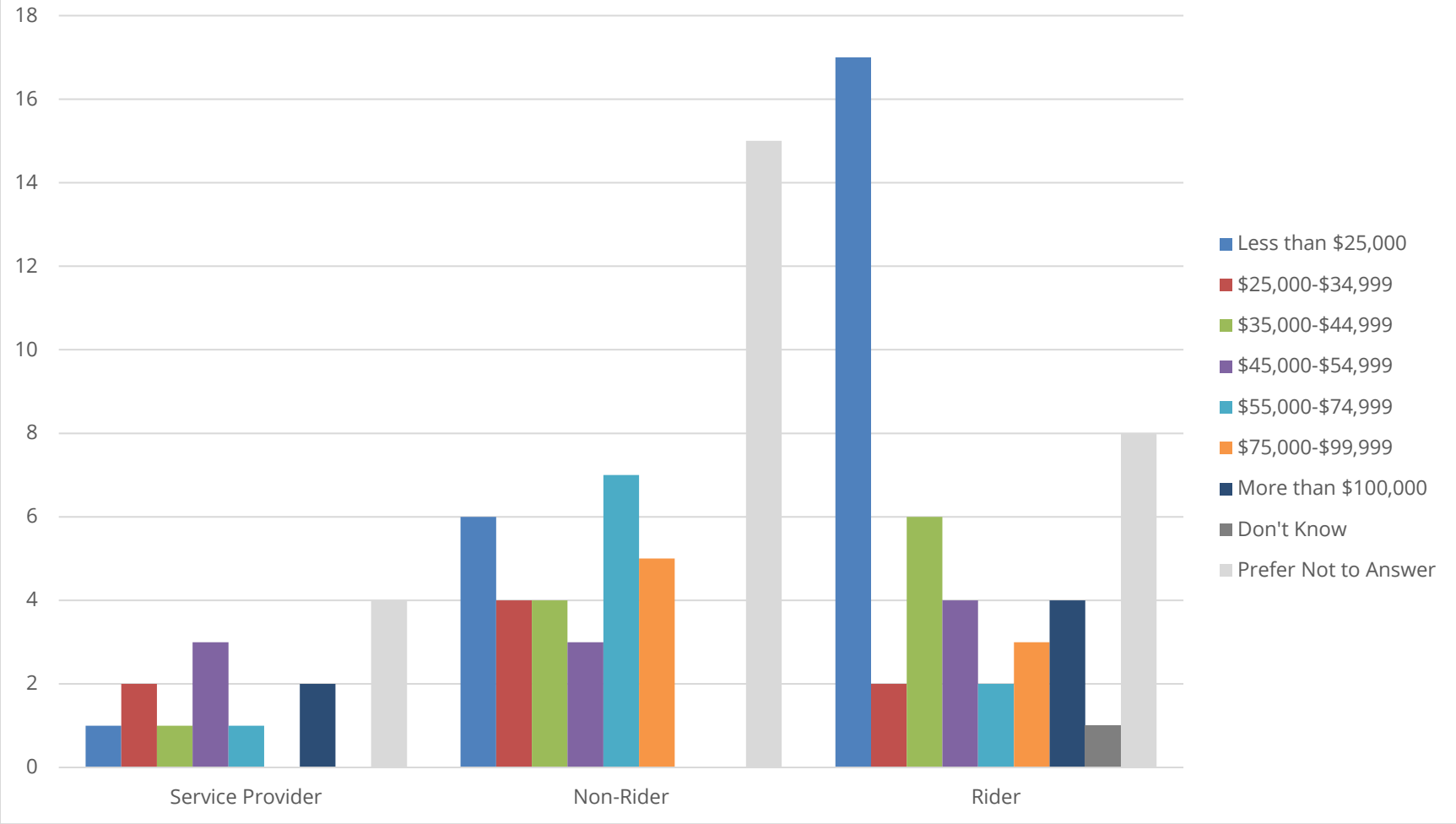


### What is your race or ethnicity? Check all that apply.

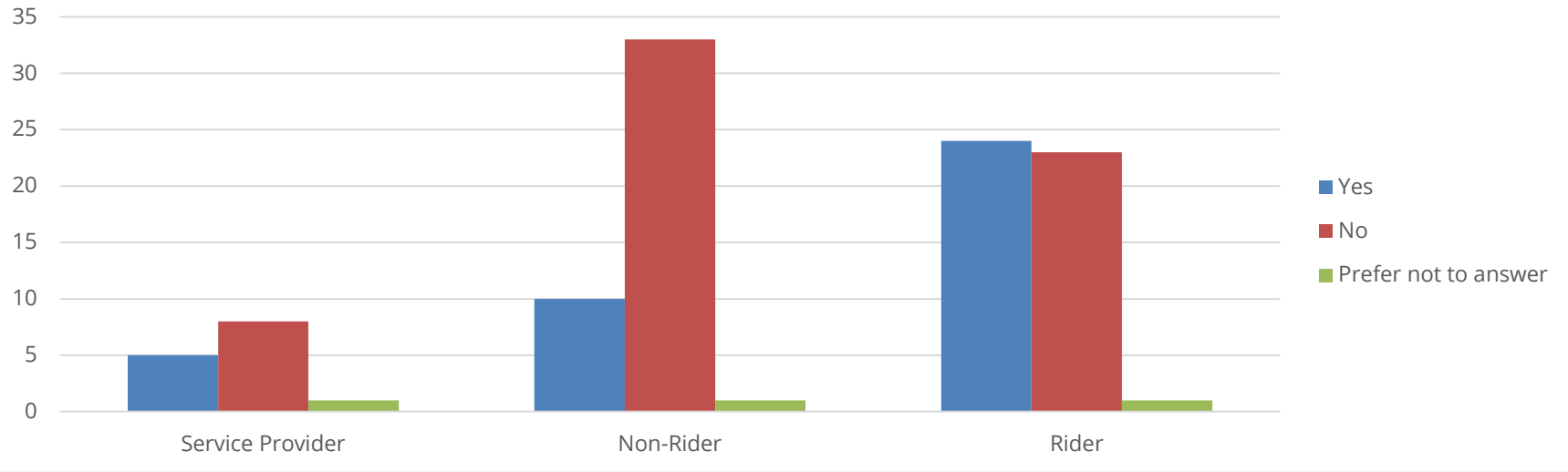




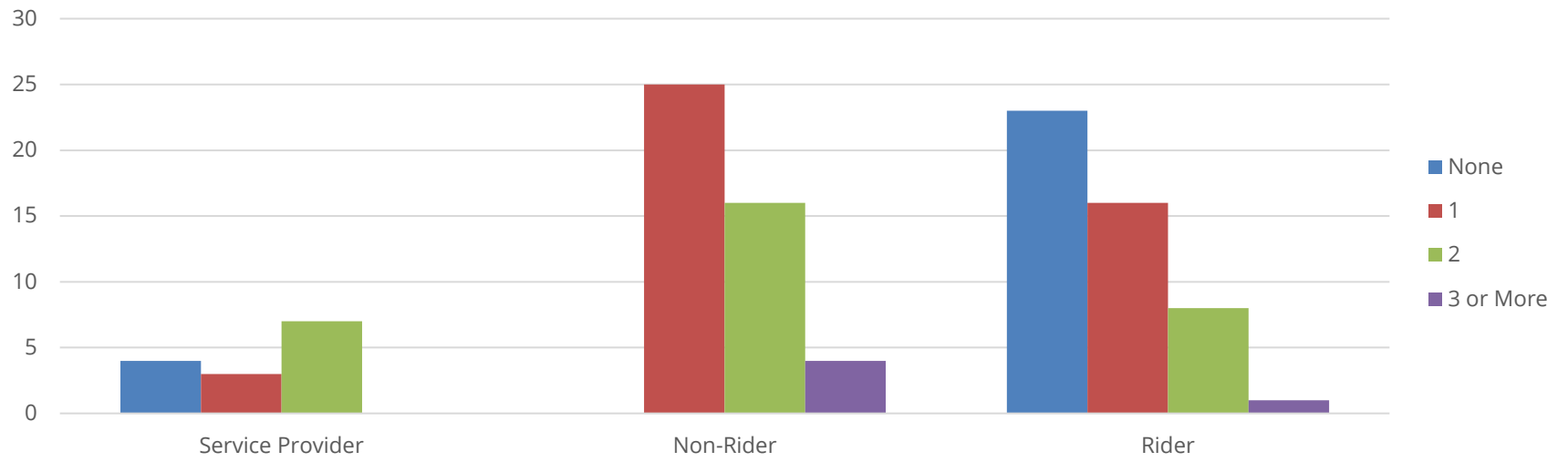
### What is your Individual income (before taxes) last year?



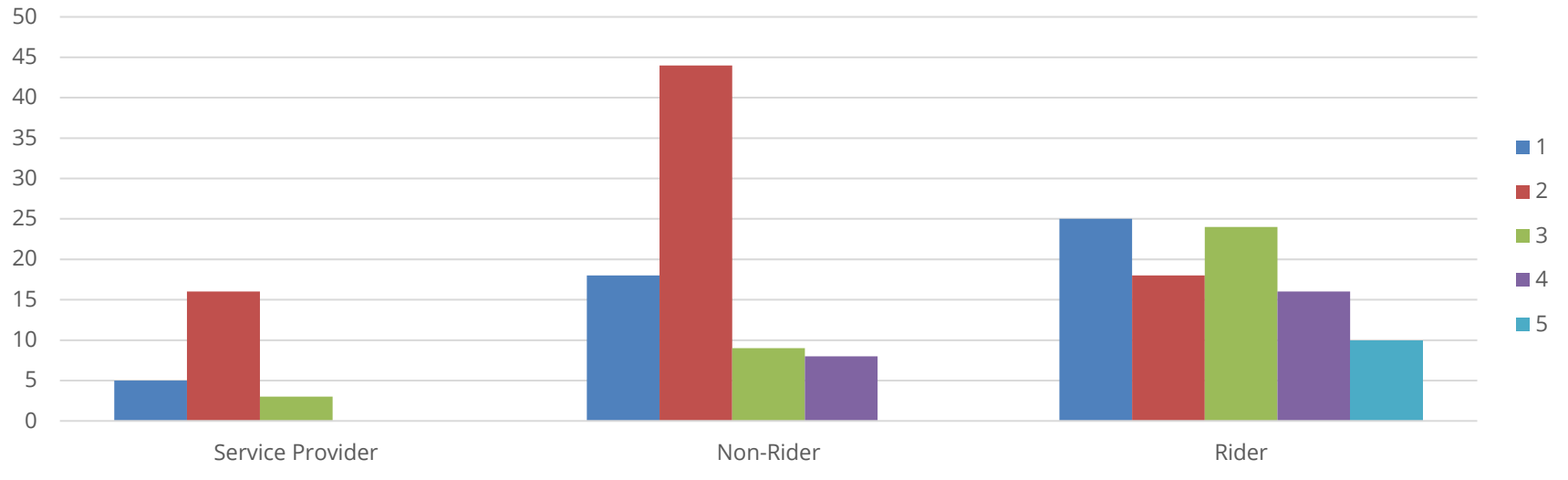
### Do you have a disability that affects your mobility?



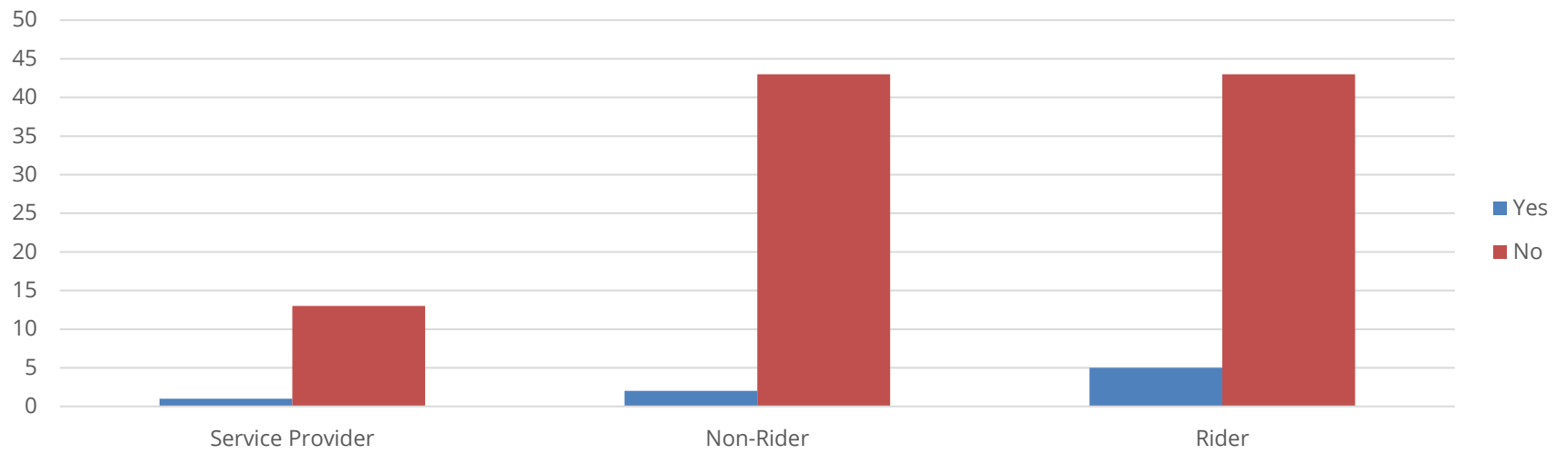
### How many working motor vehicles are available to your household?



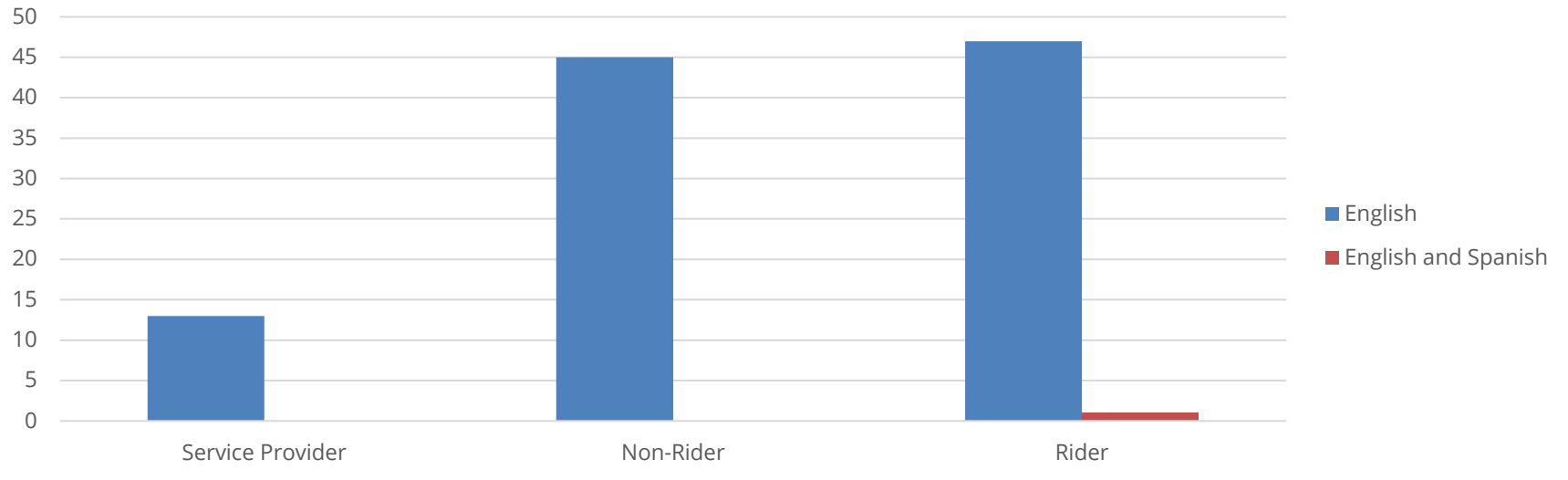
### How many people live in your household?



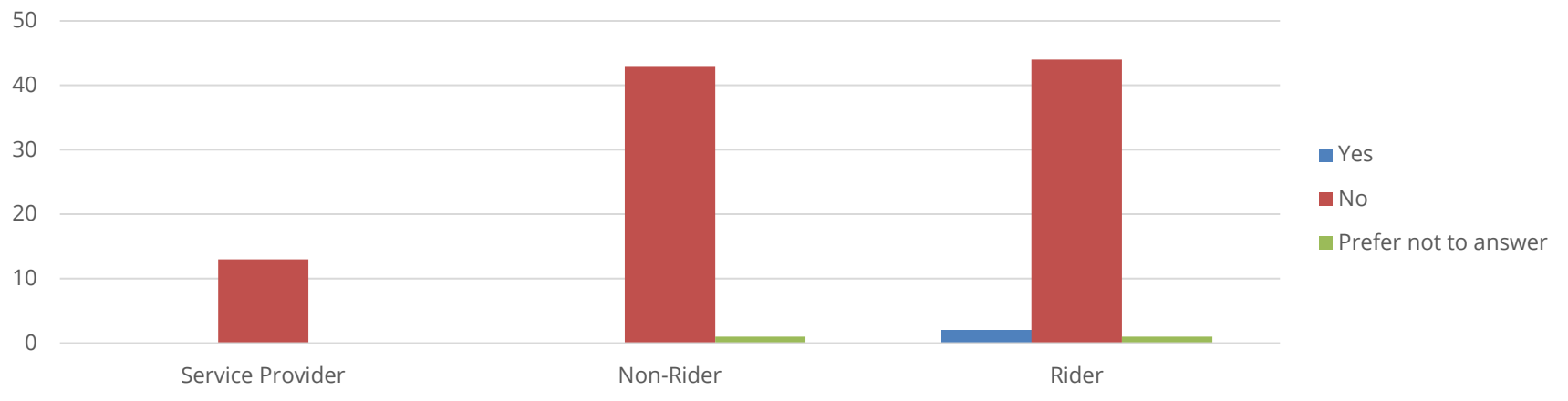
### Do you have children age 17 or younger living in your home?



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



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



# APPENDIX B. MEMO #1 – FUNDING STREAMS

# Technical Memorandum

November 10, 2023

Project# 29131

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

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

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

## CHERRIOTS FUNDING STREAMS

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## Introduction

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

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

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

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## Funding Sources

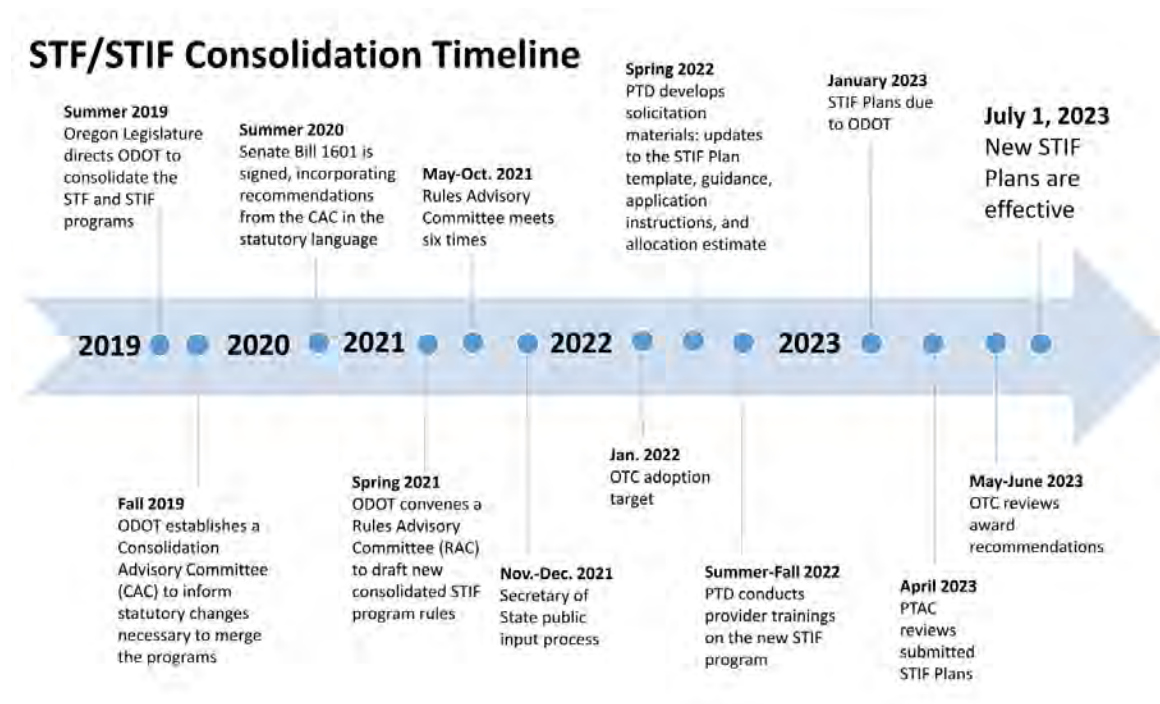
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The 2024 Cherriots Coordinated Plan Update establishes guidance for the provision of funding streams for public transit services in Marion and Polk Counties. These funding sources are described in more detail below.

## Consolidation of STF and STIF Funding

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

Figure 1. ODOT STF/ STIF Consolidation Timeline



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

## Statewide Transportation Improvement Fund (STIF)

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

STIF funding is allocated across four programs:

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

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

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

## Special Transportation Fund (STF)

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

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

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

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

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

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

## Consolidated STIF Program

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

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



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

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

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

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

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

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

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

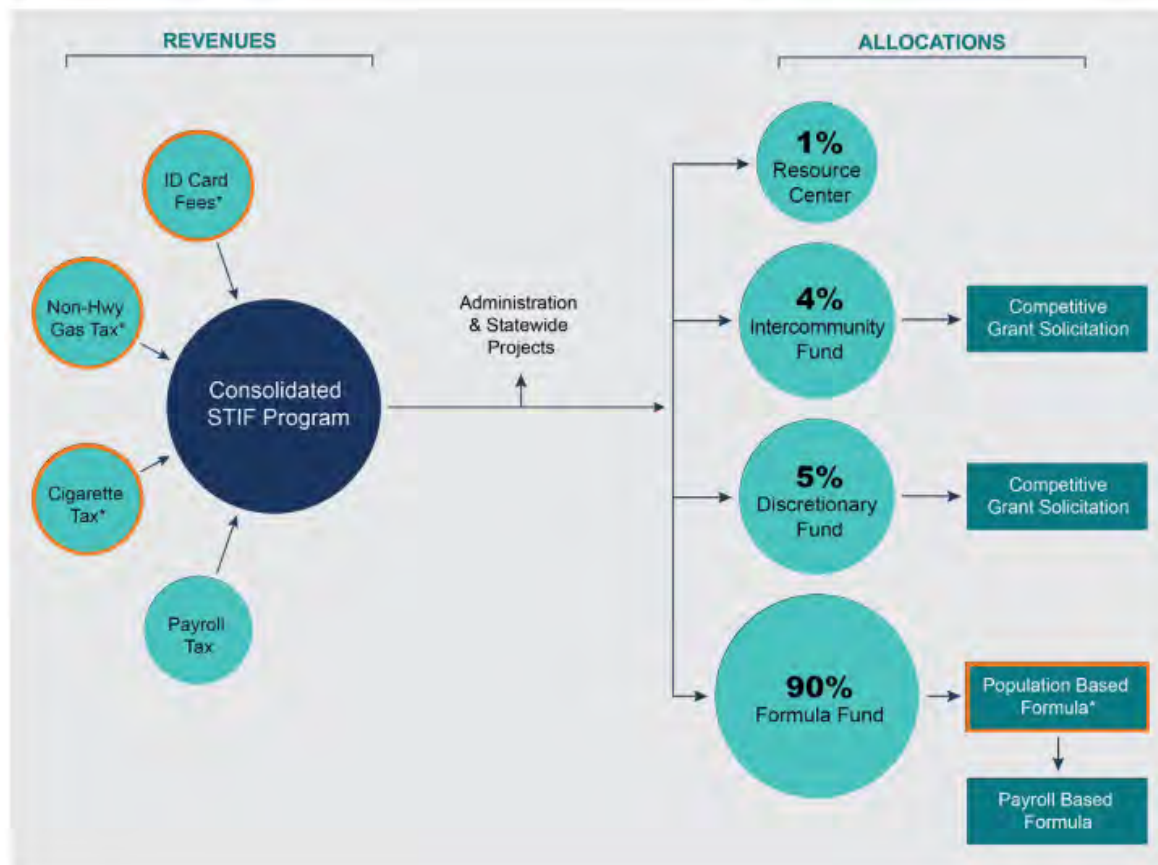


Table 1. ODOT STIF Allocation Estimate<sup>2</sup>

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

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

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

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

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

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

## Other Rural Funding

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

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

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## Cherriots Funding Allocation

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

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

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

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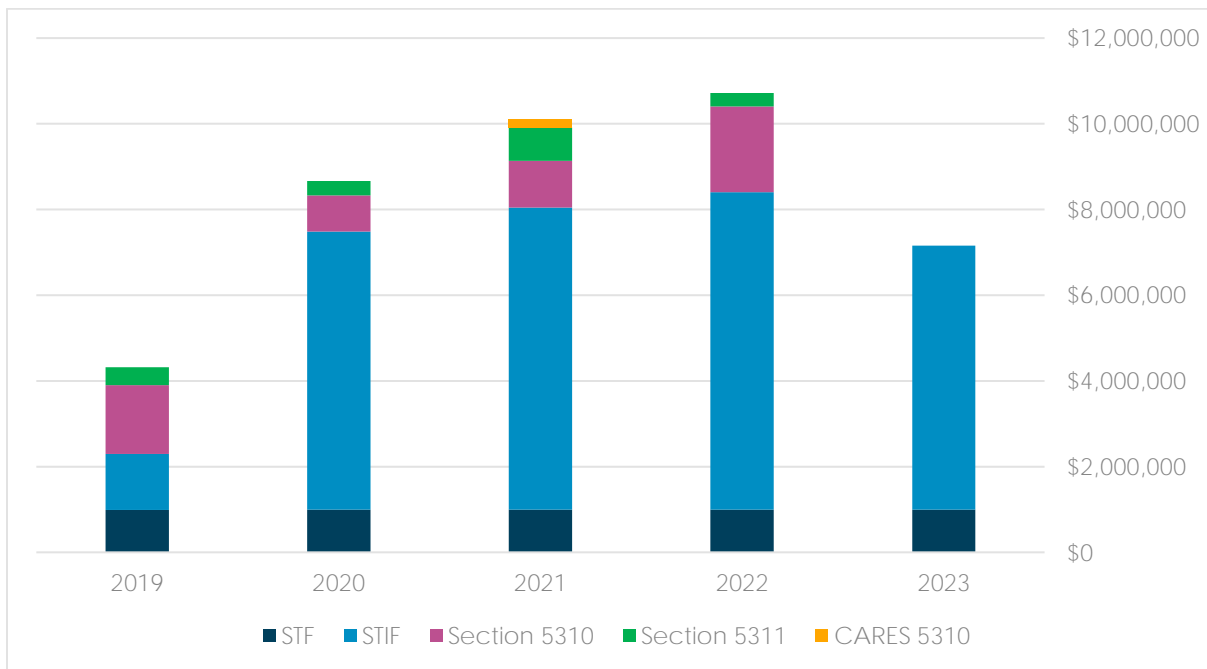
<sup>3</sup> Based on average linear growth between 2020-2021 and 2021-2022. Fiscal years 2019 and 2023 only include partial funding.

Table 2. Summary of Cherriots Funding, 2019 to 2023

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

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

Exhibit 1. Summary of Cherriots Funding, 2019 to 2023



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

# Technical Memorandum

September 4, 2023

Project# 29131

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

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

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

## DEMOGRAPHICS AND TRANSIT MARKETS

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

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

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

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

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

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

Table 1. Transit Dependent Populations

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

## Demographic Profile of Marion and Polk Counties

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

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

## Population and Employment Density

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

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

## People with Disabilities

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

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

## Seniors

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

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

## Youth

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

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

## People Experiencing Poverty

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



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

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

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

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

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

## People of a Racial/Ethnic Minority

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

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

## Zero Vehicle Households

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

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

## Limited English Proficiency Households

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

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

## Veterans

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

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

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

## Multi-Unit Households

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

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

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## Cherriots Origin-to-Destination Services

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

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

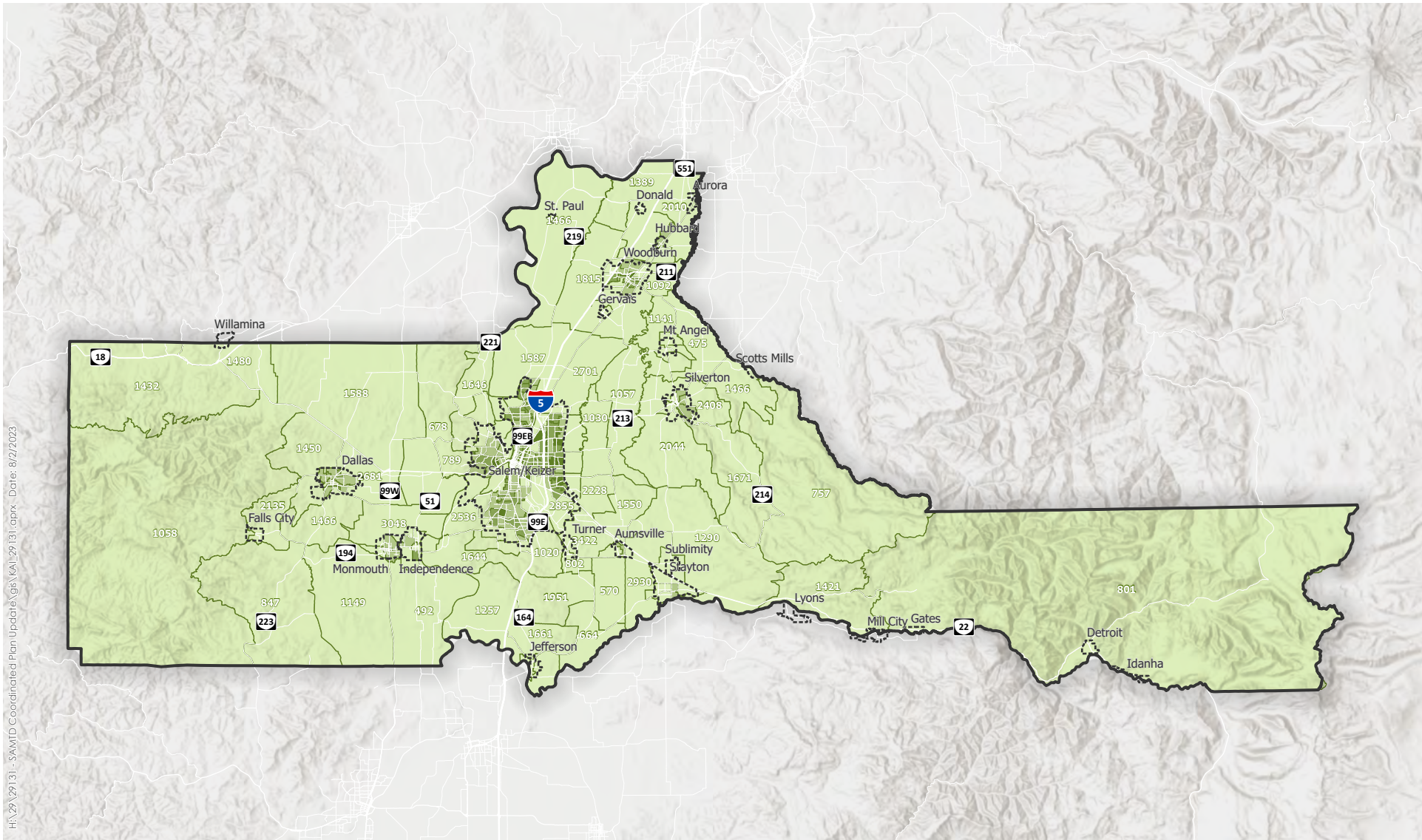
- Lancaster Drive
- River Road
- Commercial Street
- Center Street
- Downtown core area

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

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

## Cherriots Shop and Ride

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



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**People per Square Mile by Block Group**

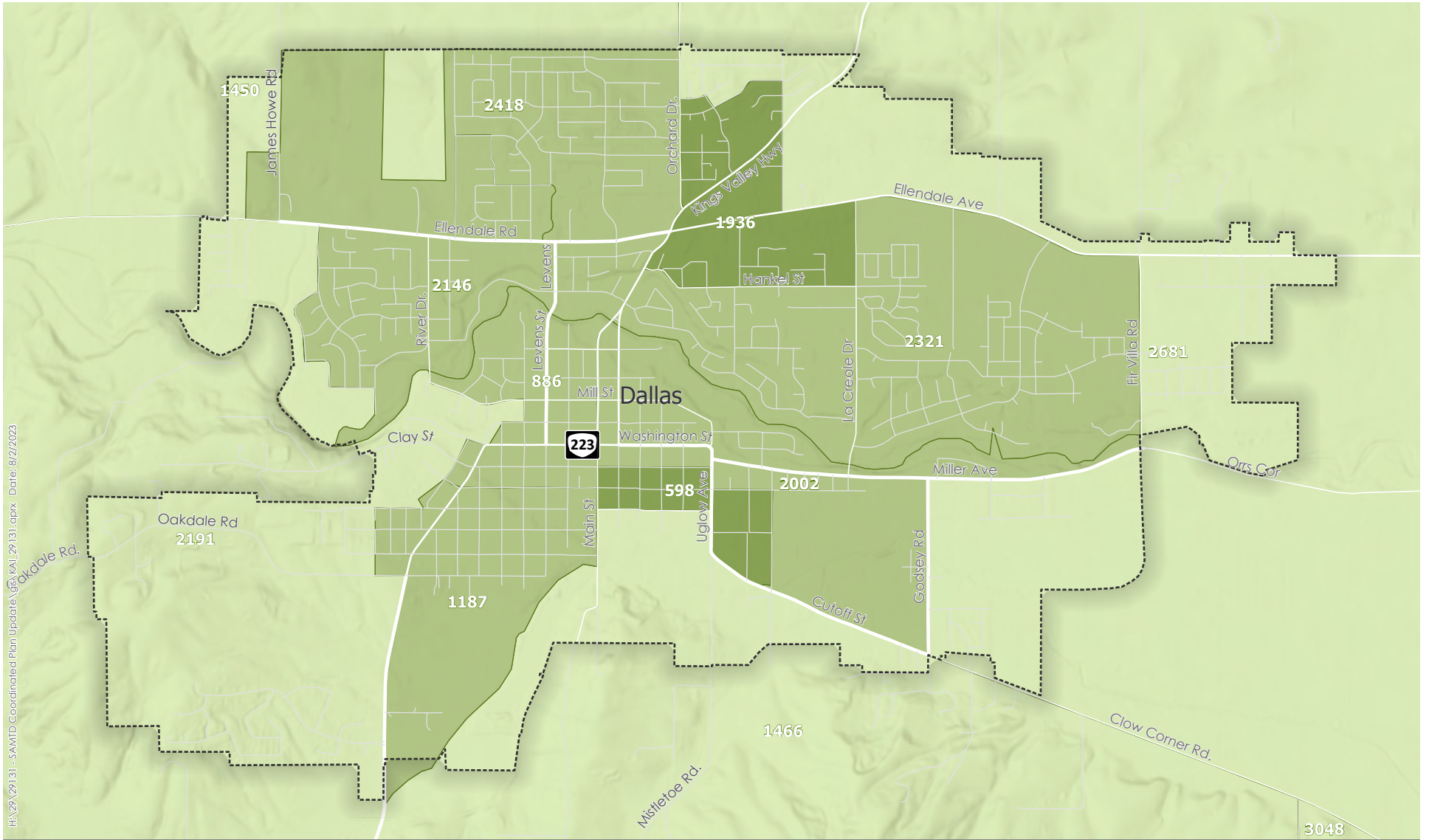
- 2 - 2,194
- 2,195 - 5,116
- 5,117 - 8,763
- 8,764 - 18,139

- County Boundary
- UGB







Figure 1



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



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**People per Square Mile by Block Group**

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

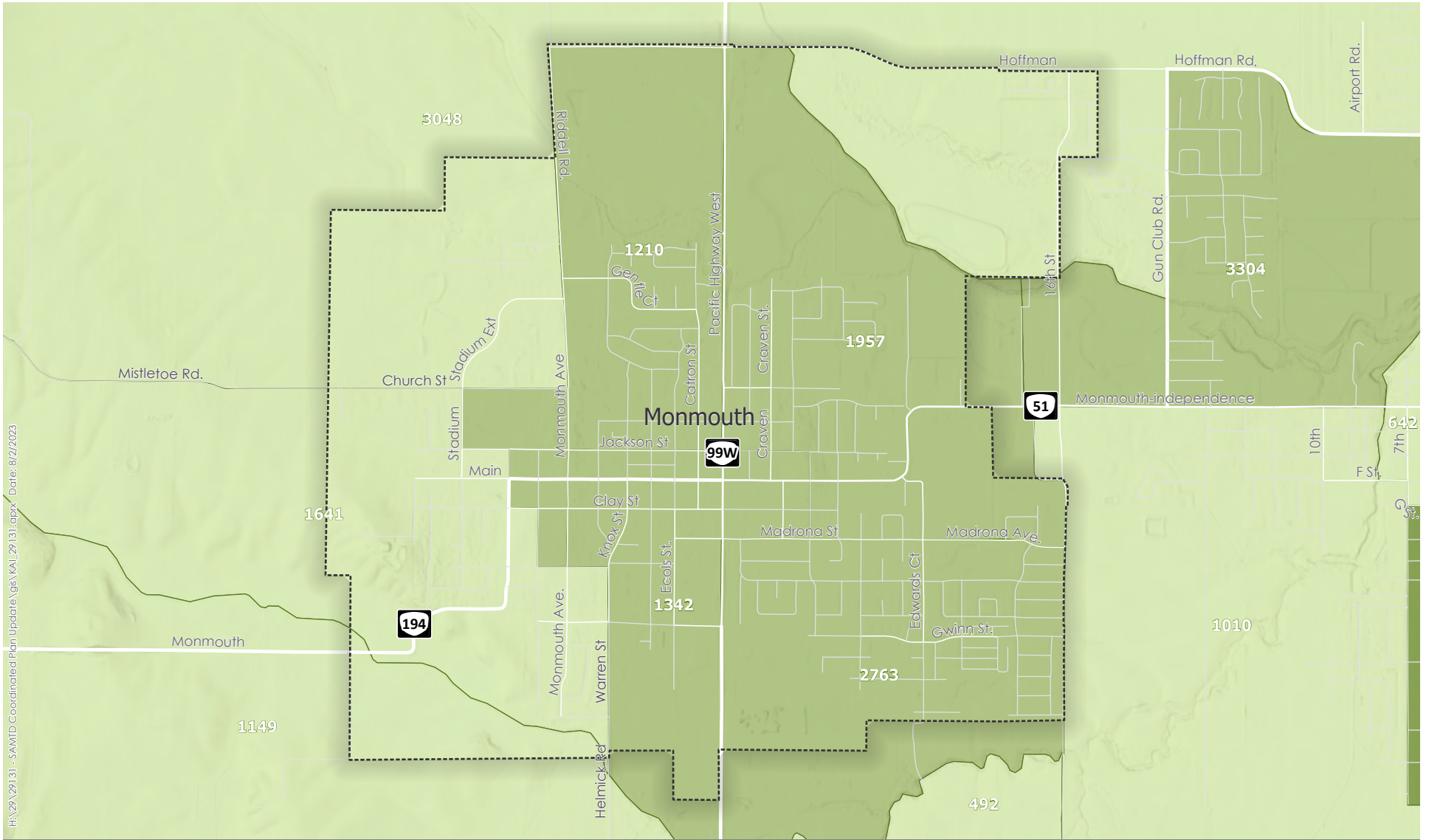
-  County Boundary
-  UGB

0 0.9 Miles



Figure 1

**Population Density  
Dallas, OR**



**People per Square Mile by Block Group**

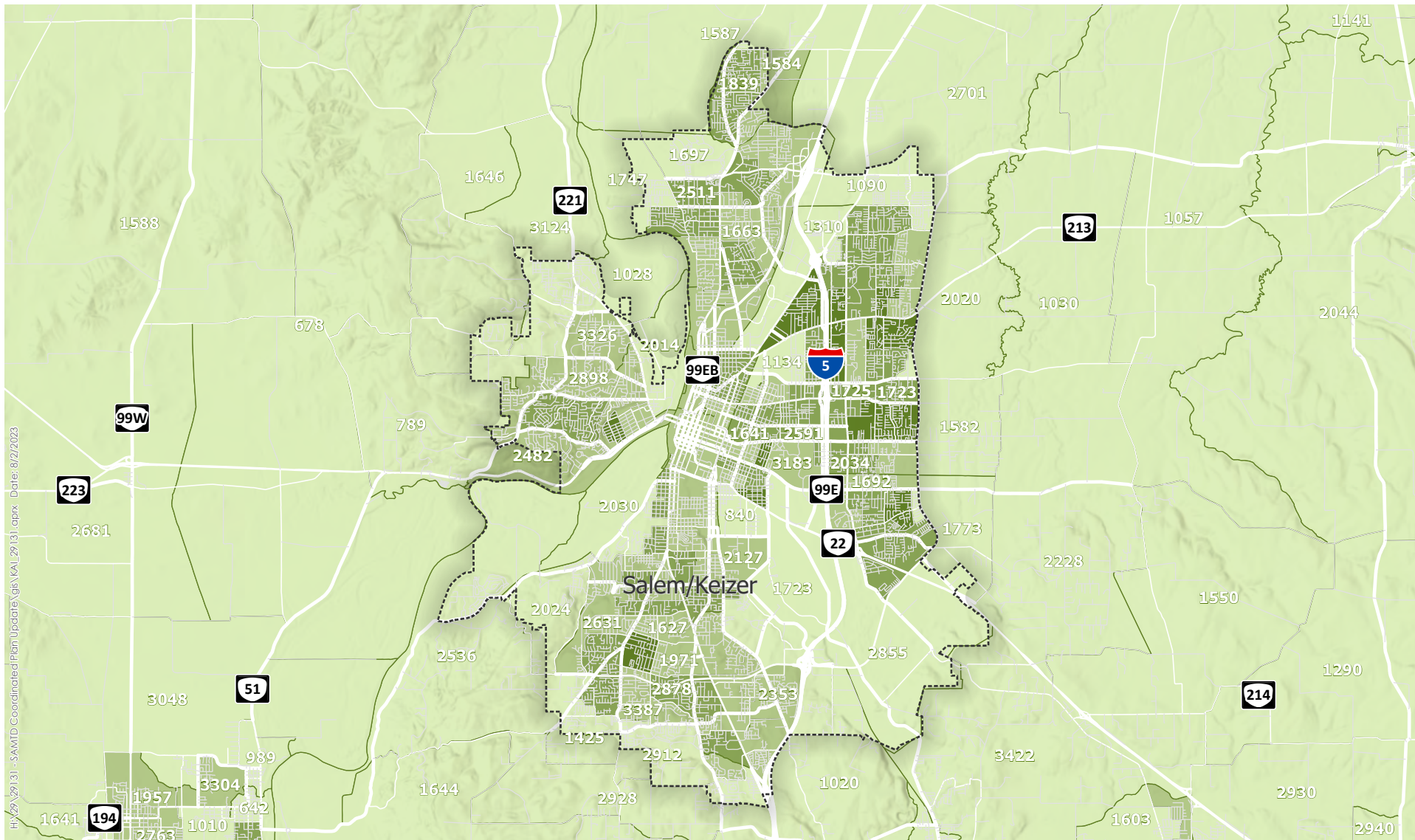
- 2 - 2,194
- 2,195 - 5,116
- 5,117 - 8,763
- 8,764 - 18,139

- County Boundary
- UGB







Figure 1

**Population Density  
Monmouth, OR**



**People per Square Mile by Block Group**

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



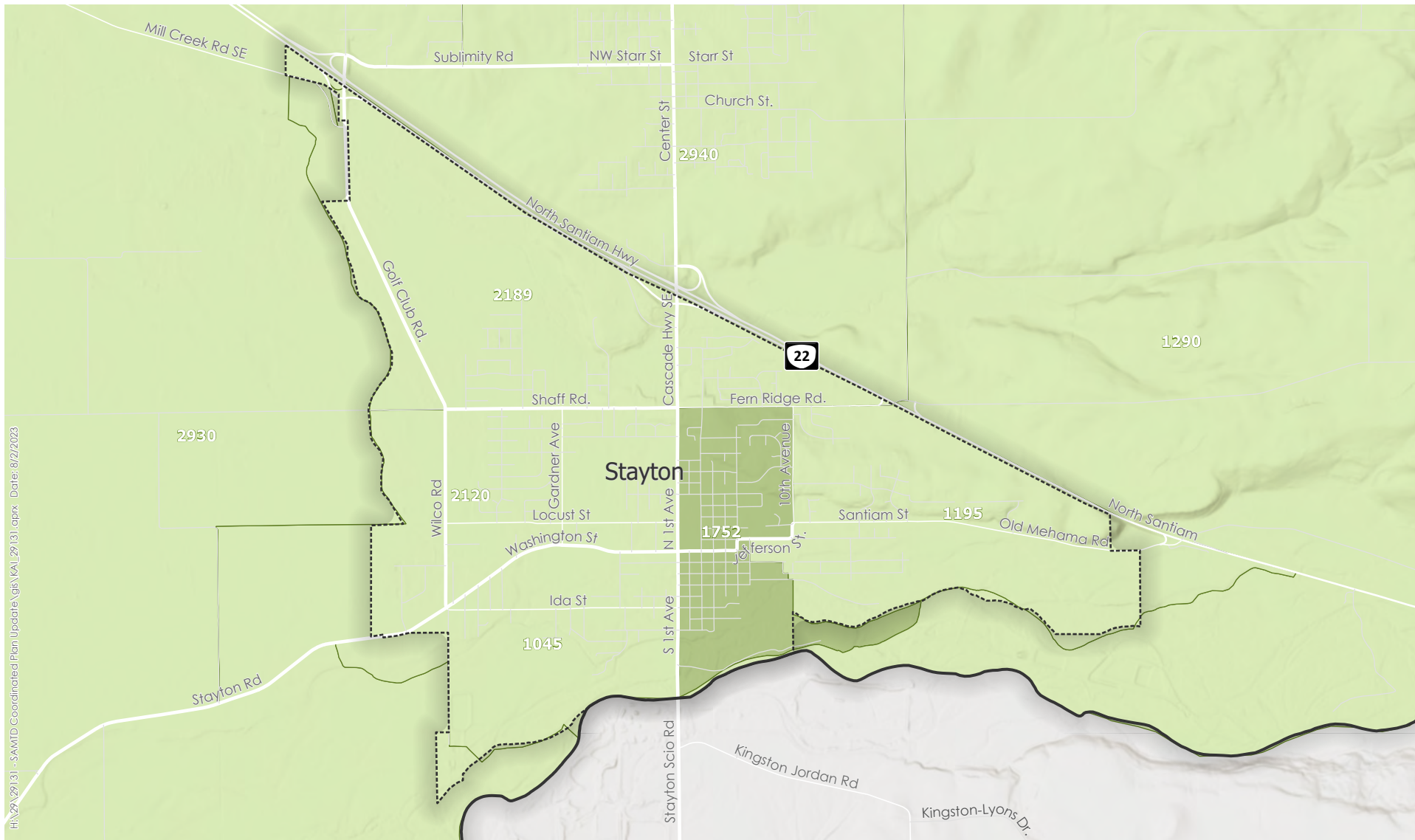
-  County Boundary
-  UGB







Figure 1

**Population Density  
Salem/Keizer, OR**



**People per Square Mile by Block Group**

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



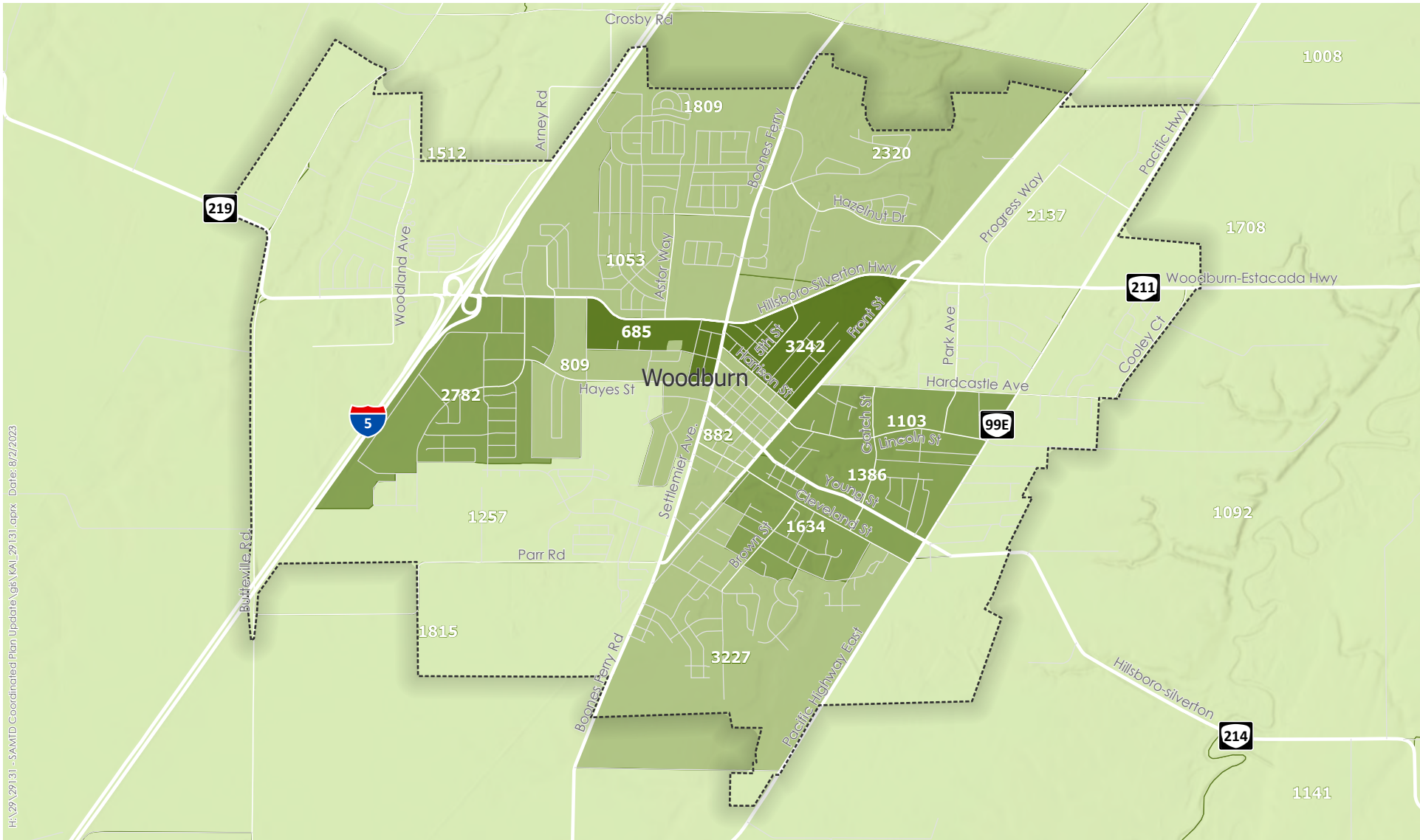
-  County Boundary
-  UGB



Figure 1

**Population Density  
Stayton, OR**





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**People per Square Mile by Block Group**

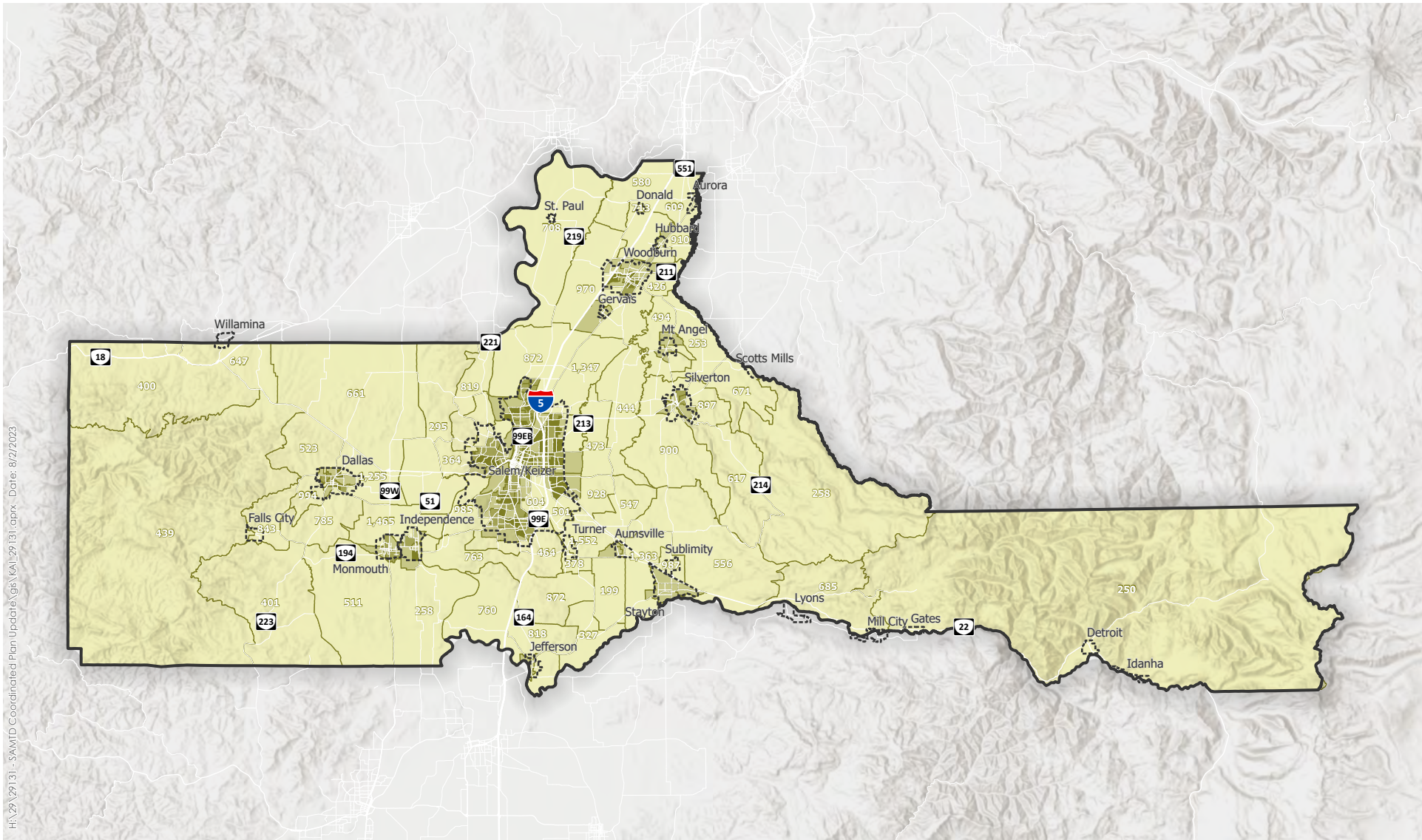
- 2 - 2,194
- 2,195 - 5,116
- 5,117 - 8,763
- 8,764 - 18,139

- County Boundary
- UGB







Figure 1

**Population Density  
Woodburn, OR**



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

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



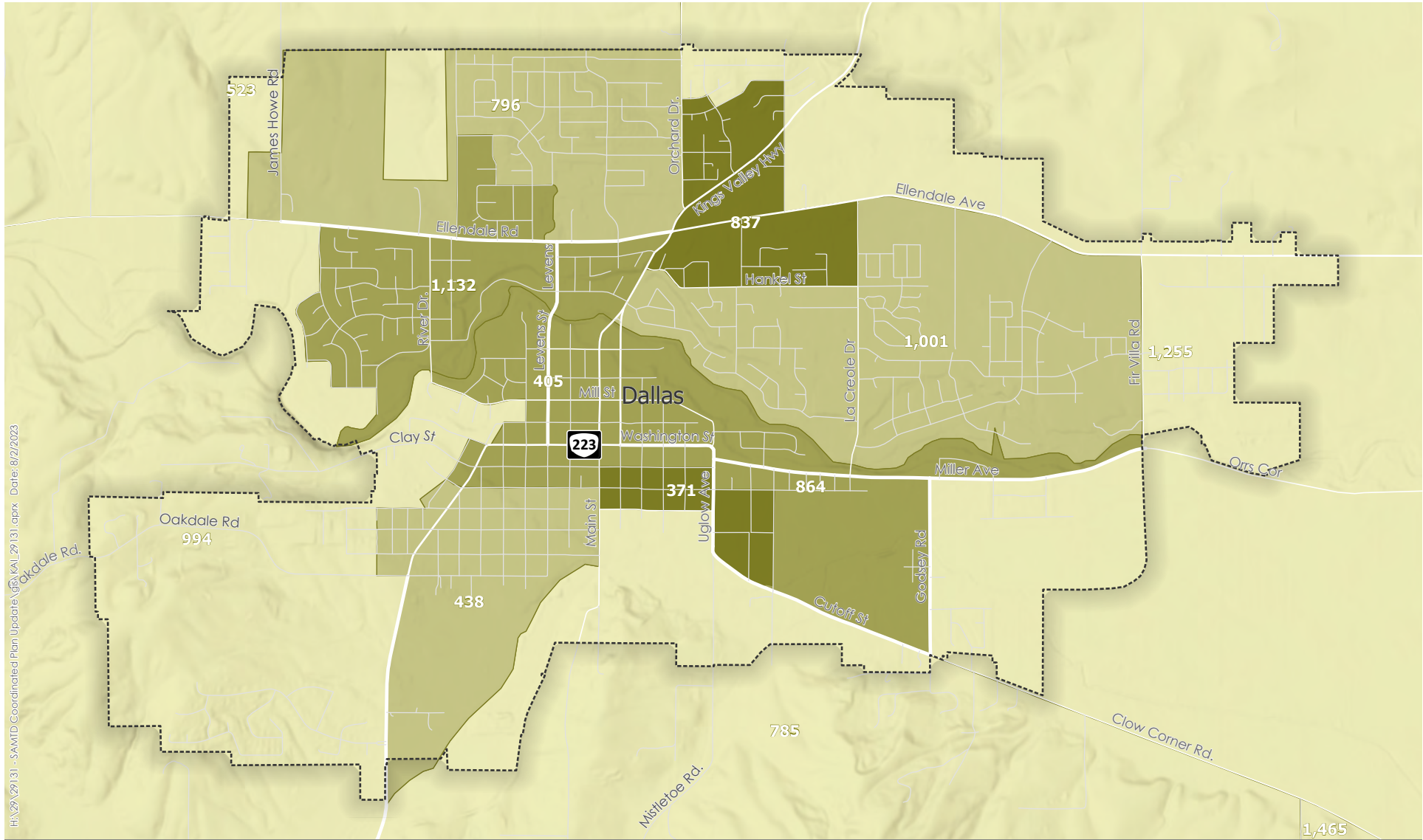
-  County Boundary
-  UGB



Figure 2

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



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

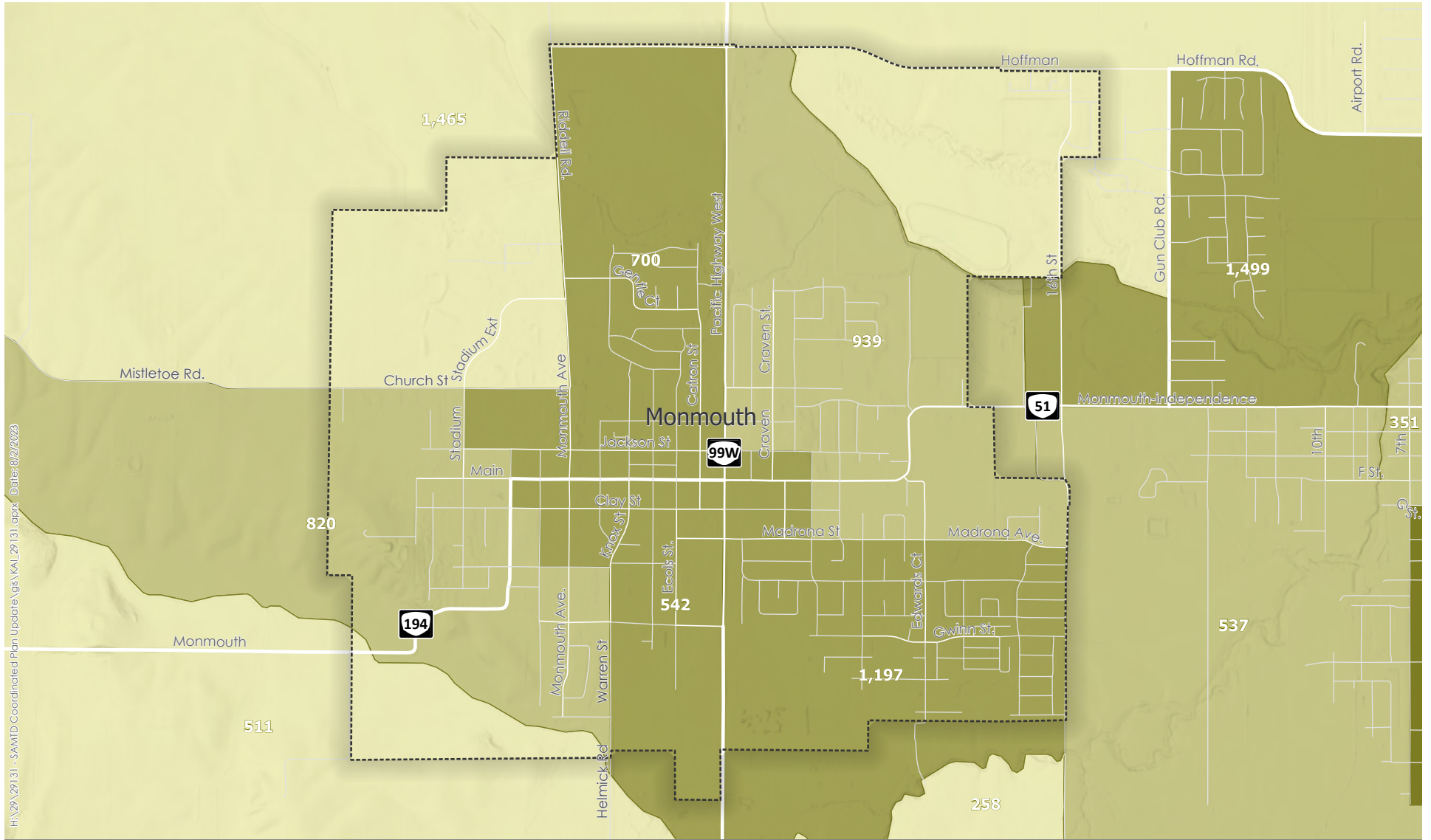
- 1 - 295
- 296 - 1,374
- 1,375 - 2,772
- 2,773 - 11,381

- County Boundary
- UGB







Figure 2

**Employment Density  
Dallas, OR**



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

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



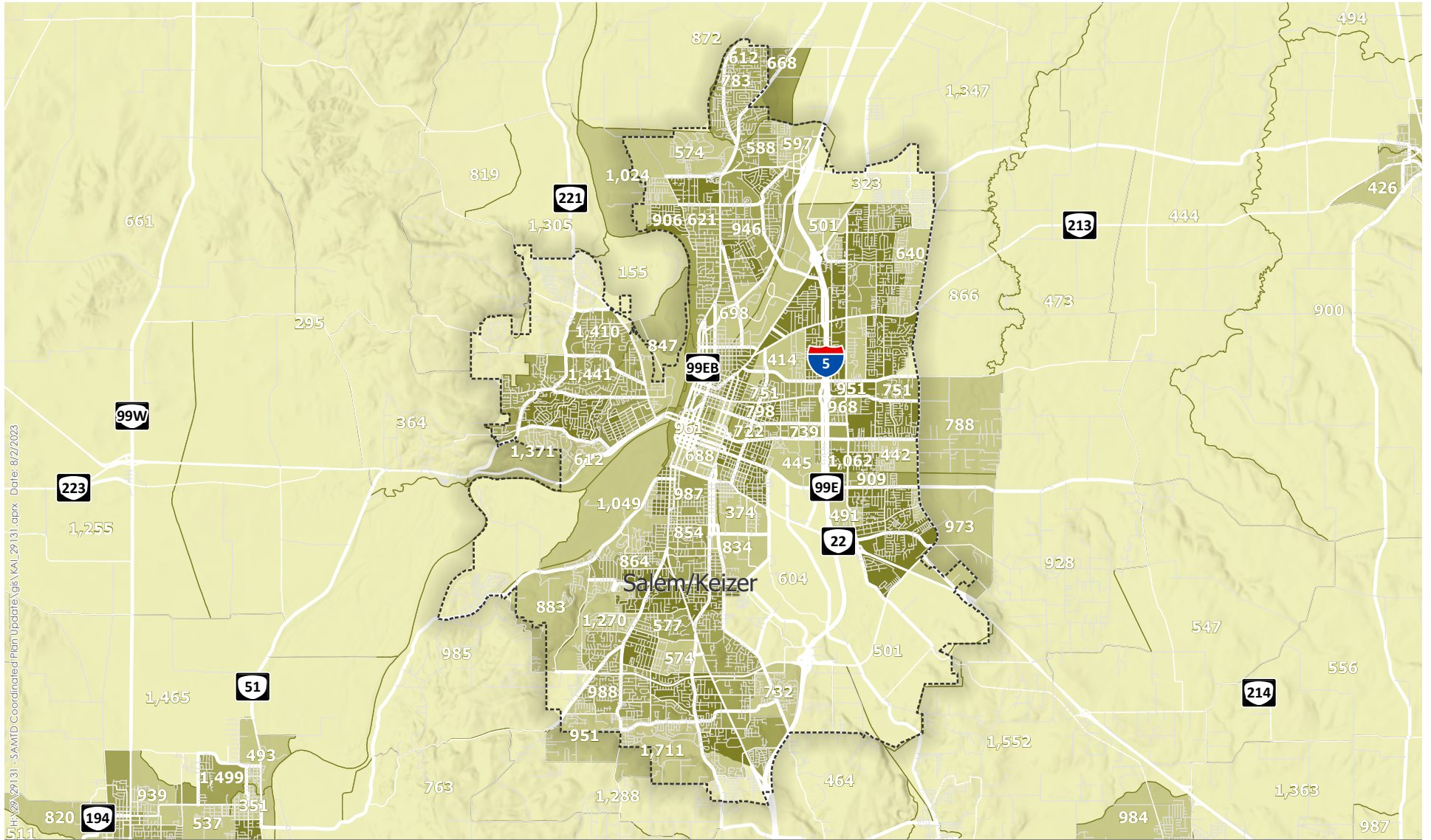
-  County Boundary
-  UGB







Figure 2

**Employment Density  
Monmouth, OR**



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

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



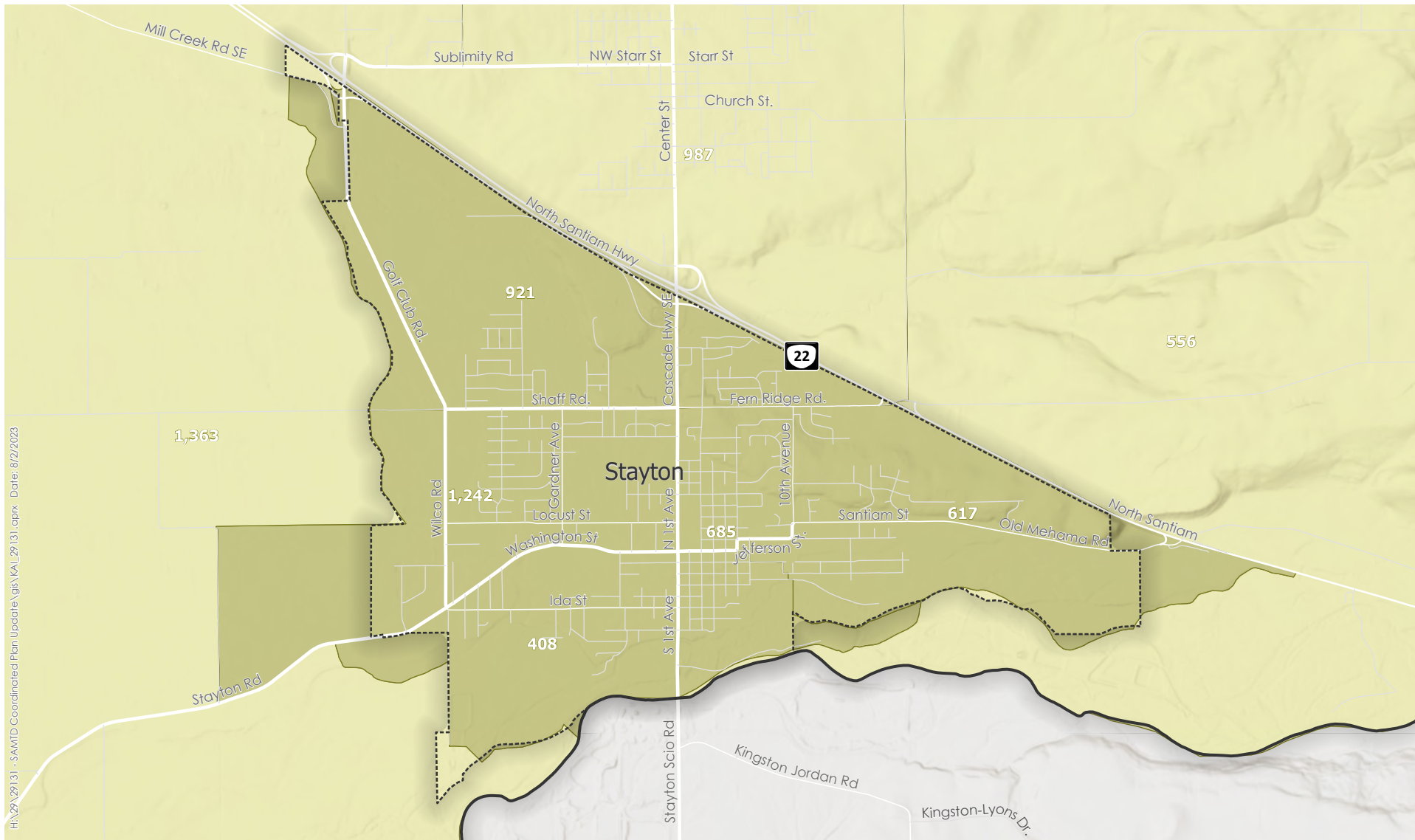
-  County Boundary
-  UGB



Figure 2

**Employment Density  
Salem/Keizer, OR**



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

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

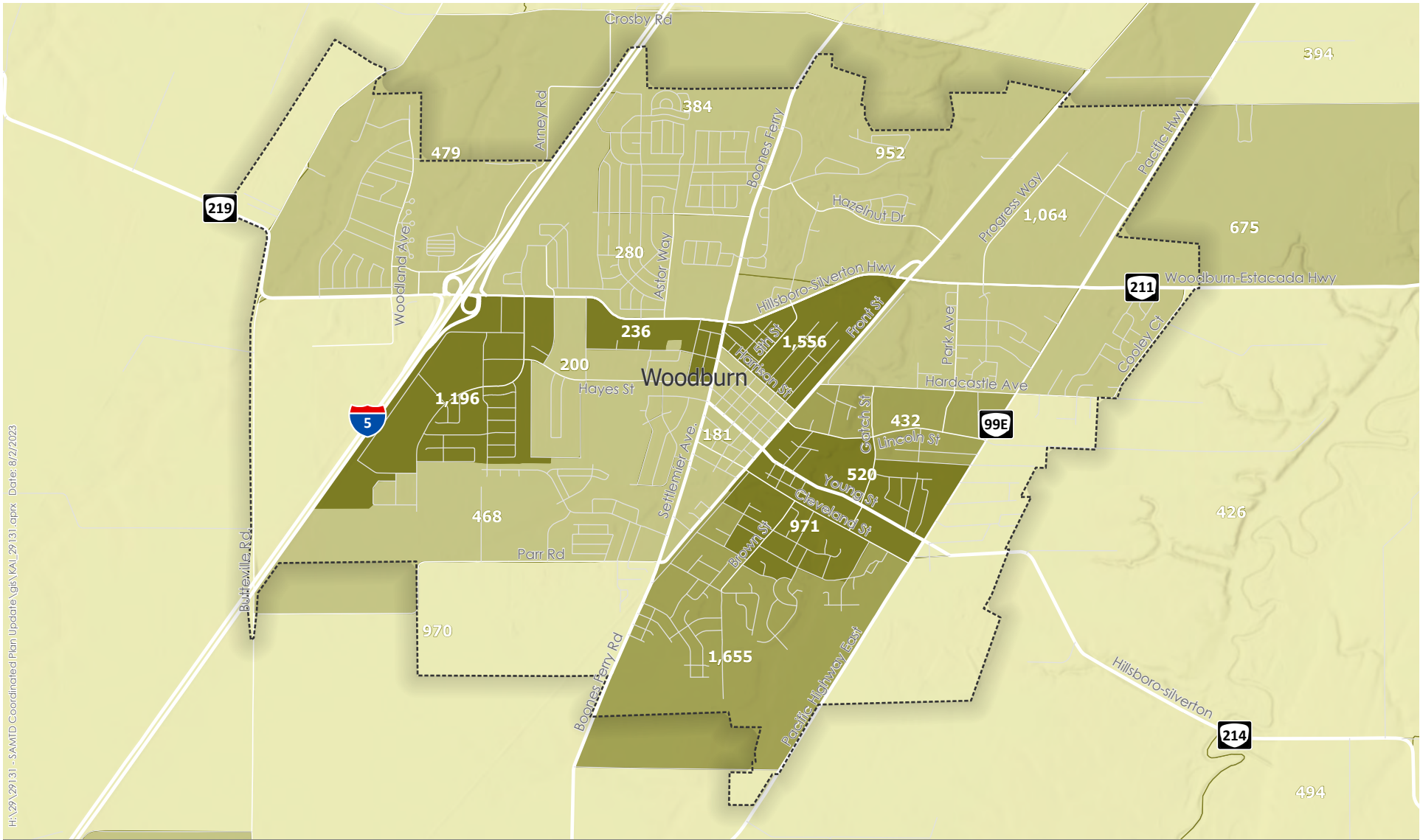
- County Boundary
- UGB



Figure 2

**Employment Density  
Stayton, OR**

H:\291\_29131 - SAMTD Coordinated Plan Update\gis\KAL\_29131.aprx Date: 8/2/2023



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

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

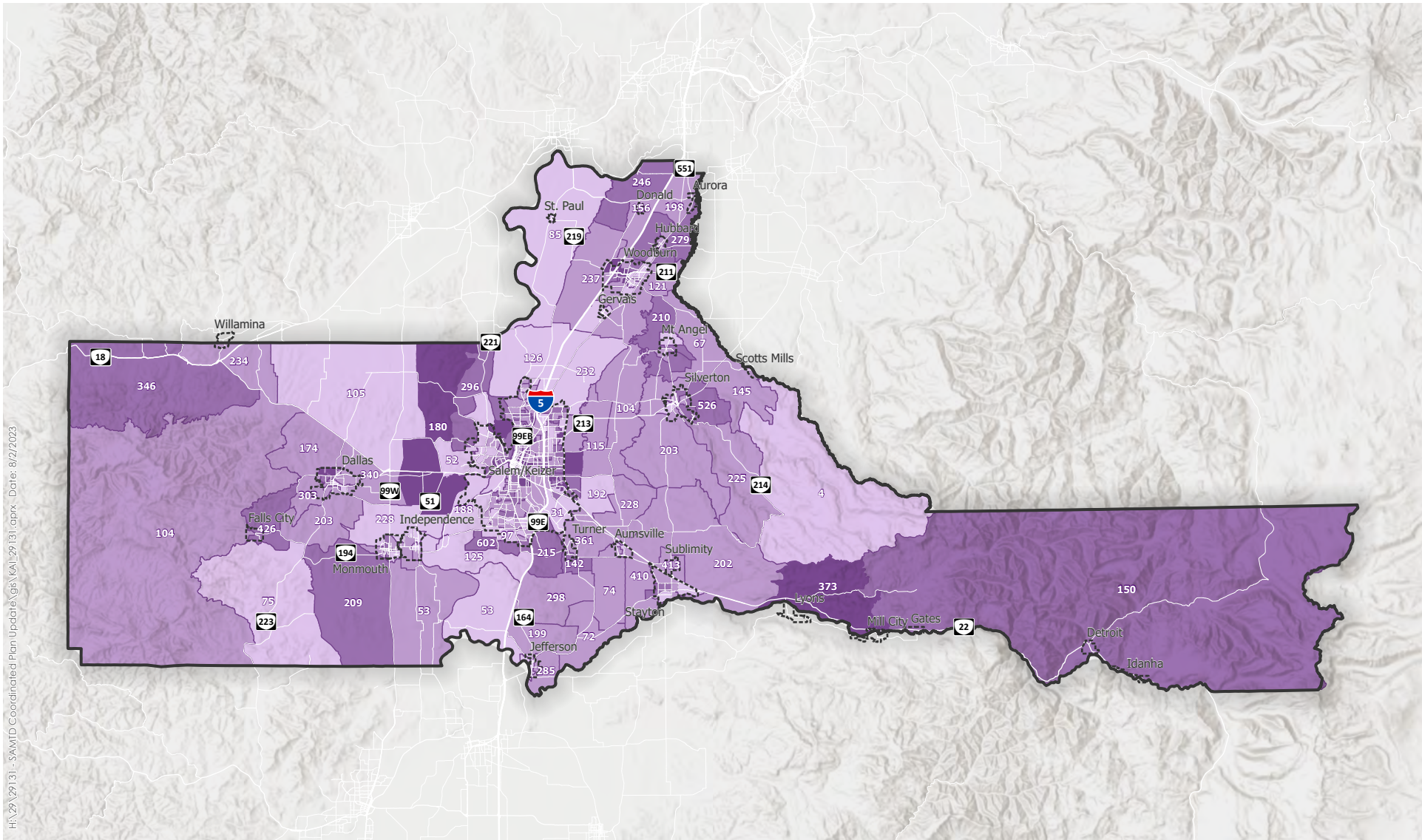
- 1 - 295
- 296 - 1,374
- 1,375 - 2,772
- 2,773 - 11,381

- County Boundary
- UGB



Figure 2

**Employment Density  
Woodburn, OR**



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

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

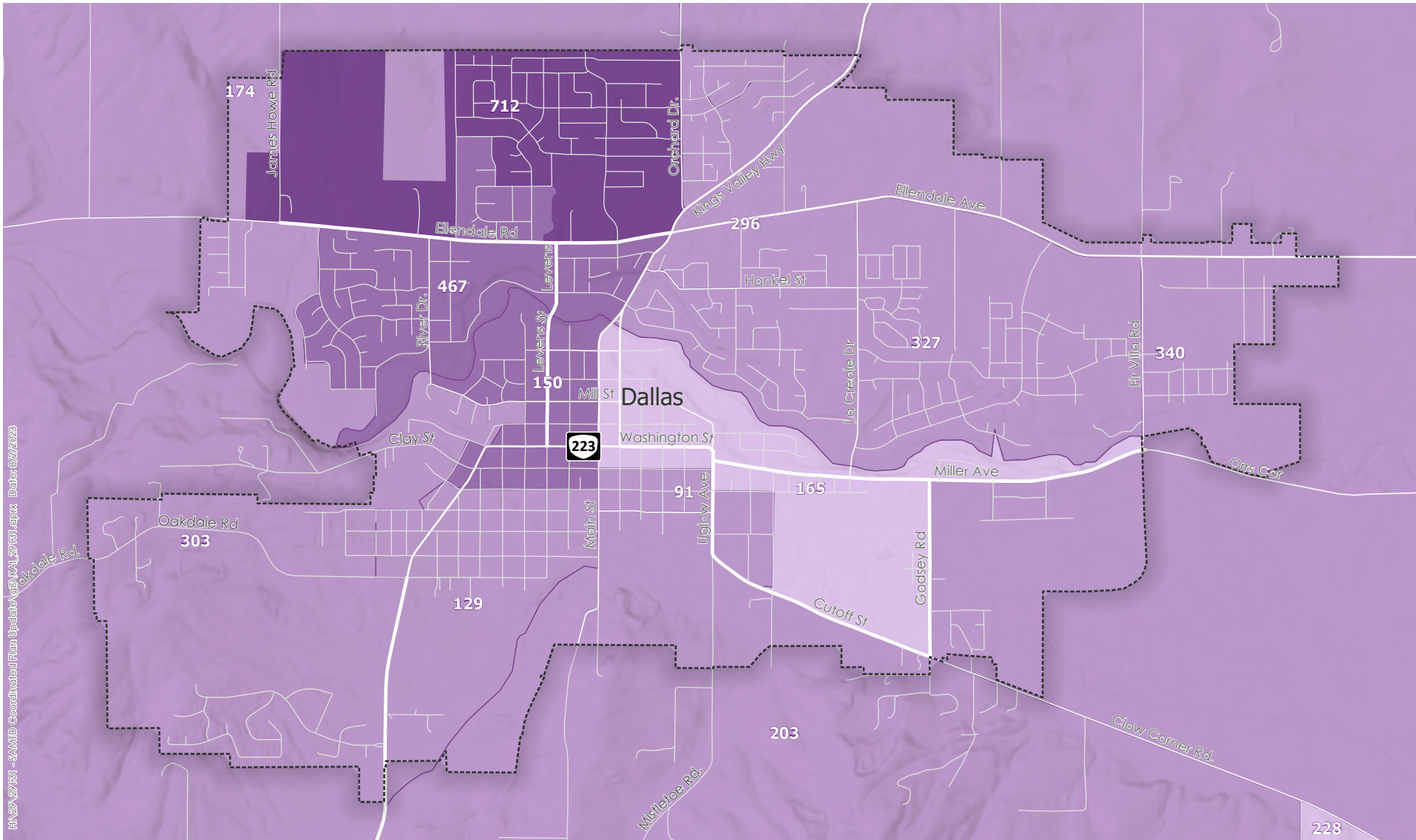
- County Boundary
- UGB



Figure 3

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





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

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

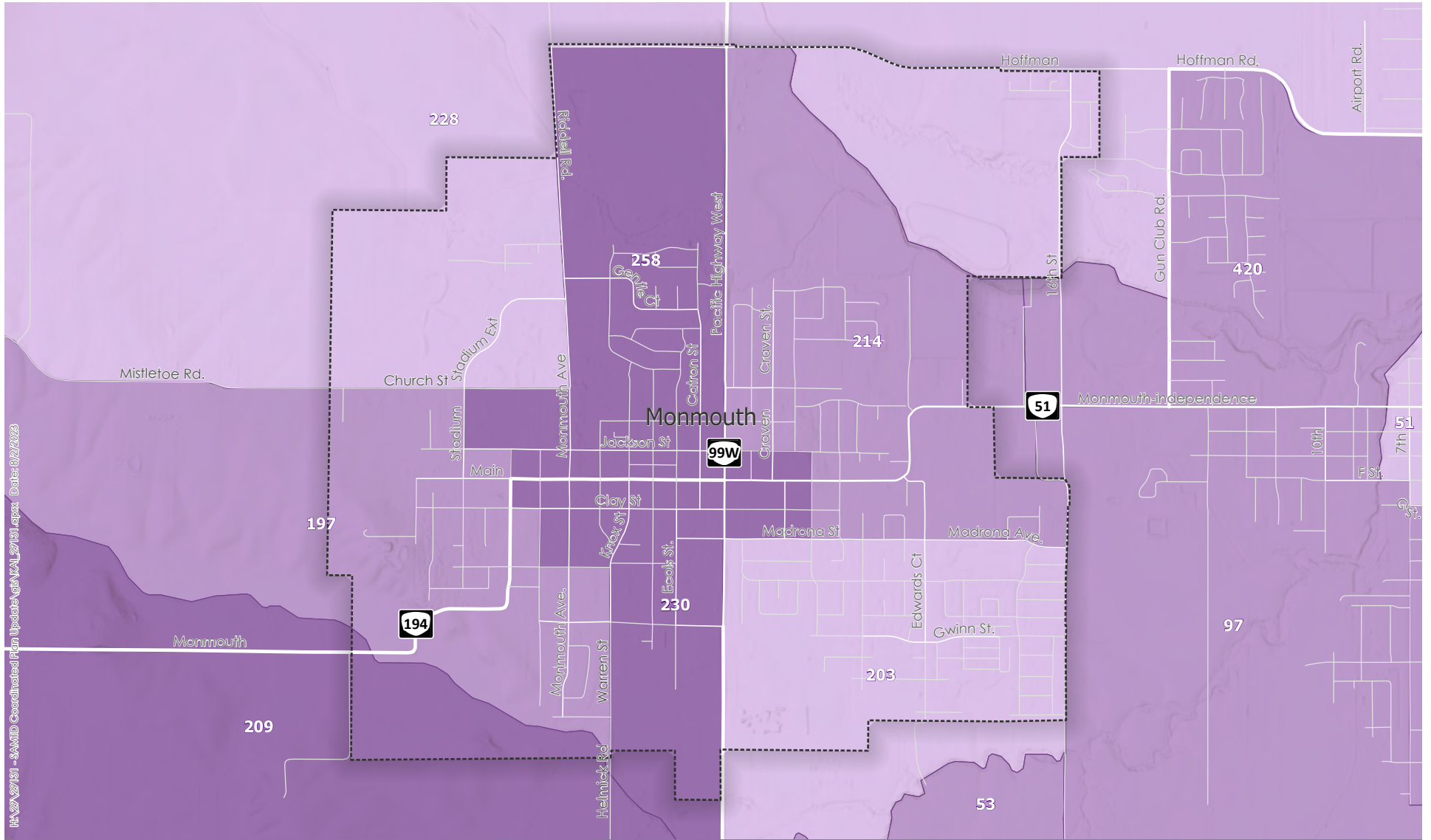
- 1% - 9%
- 10% - 16%
- 17% - 24%
- 25% - 40%

- County Boundary
- UGB







Figure 3

**Population with Disabilities  
Dallas, OR**



H:\28\27131 - SAMID Coordinated Plan Update\GIS\27131\_4.aprx Date: 8/2/2023

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

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



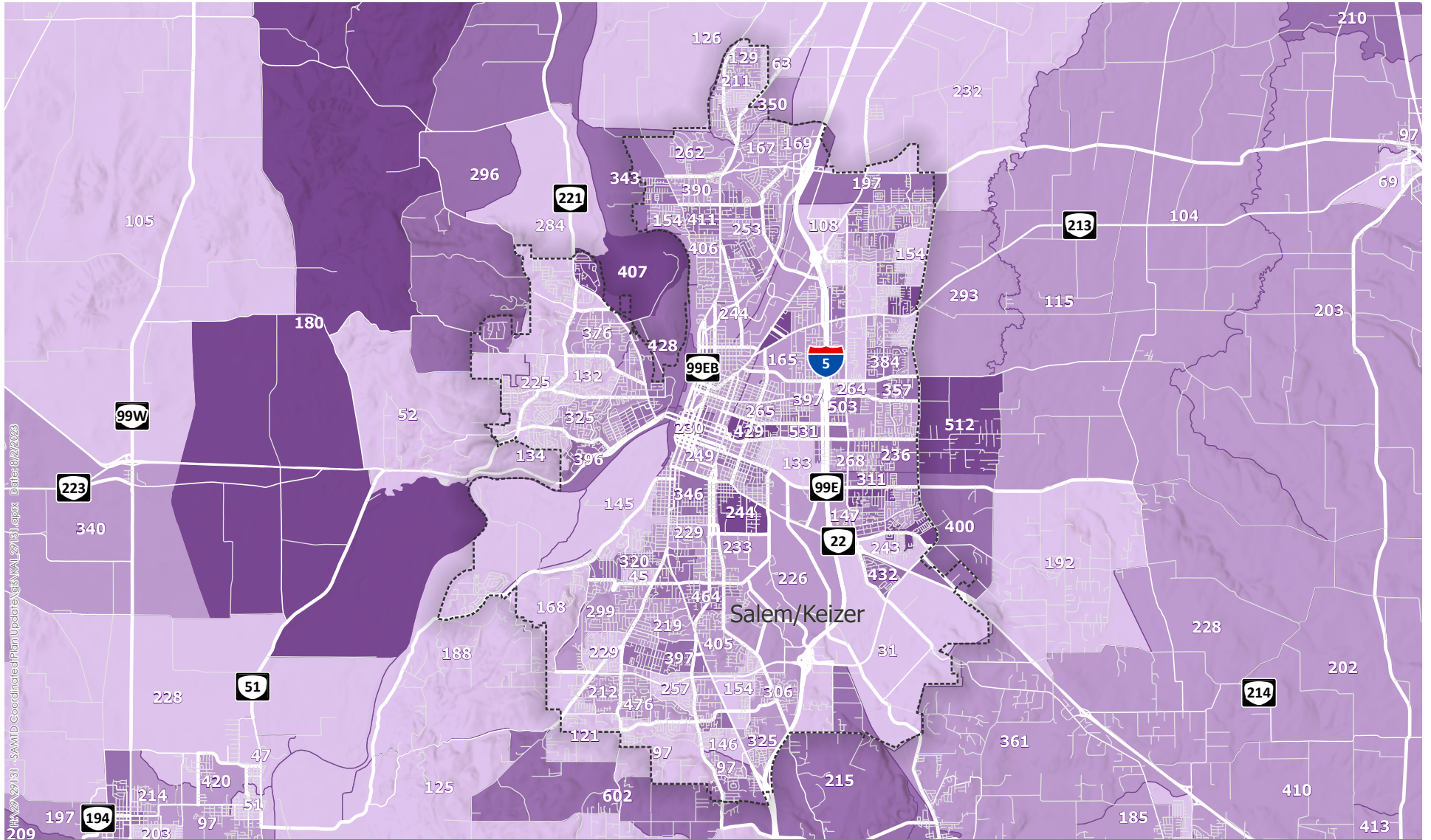
-  County Boundary
-  UGB







Figure 3

**Population with Disabilities  
Monmouth, OR**



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

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



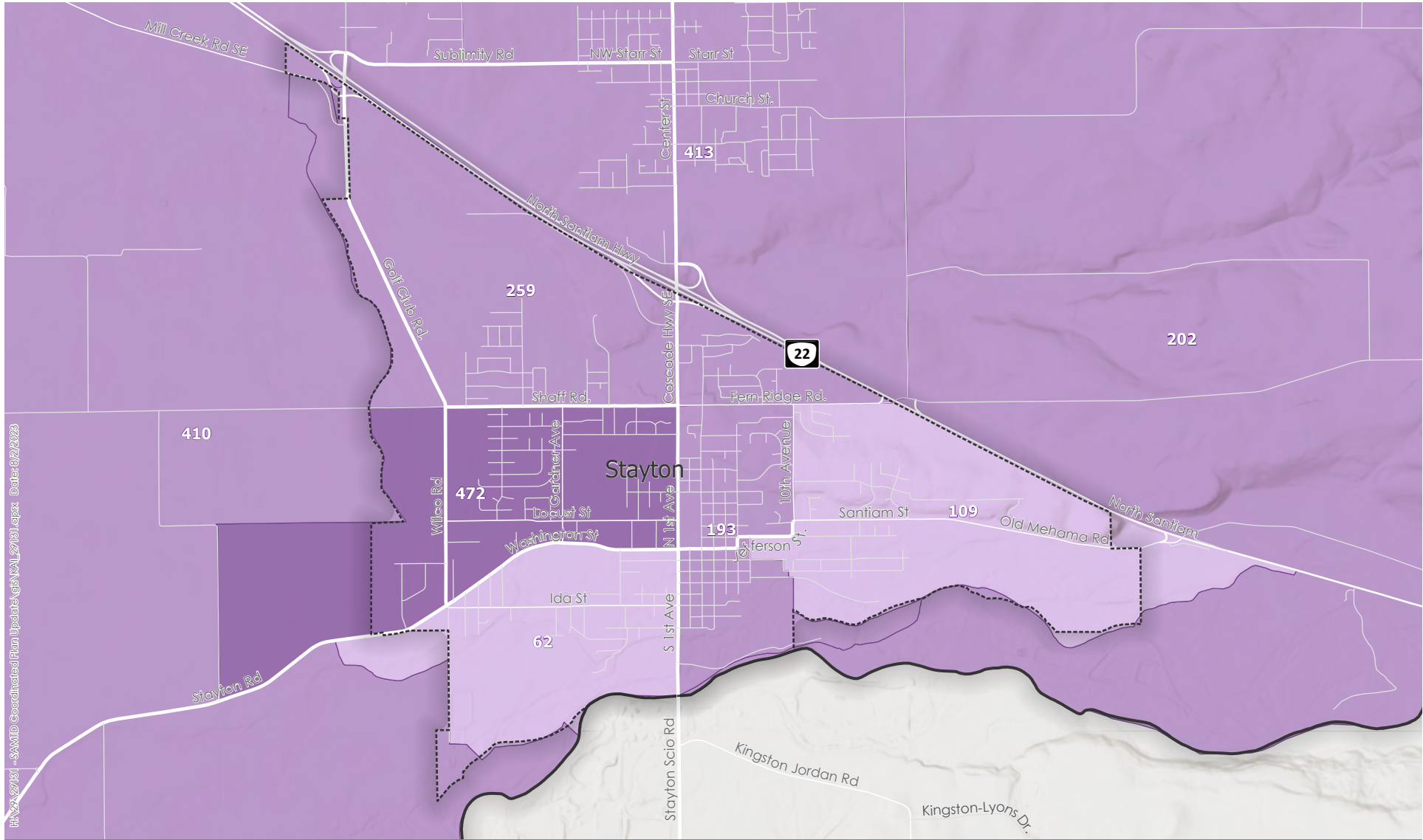
-  County Boundary
-  UGB



Figure 3

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



H:\24\_27131 - SAMID Coordinated Plan Update\GIS\Map\_27131.aprx Date: 8/2/2023

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

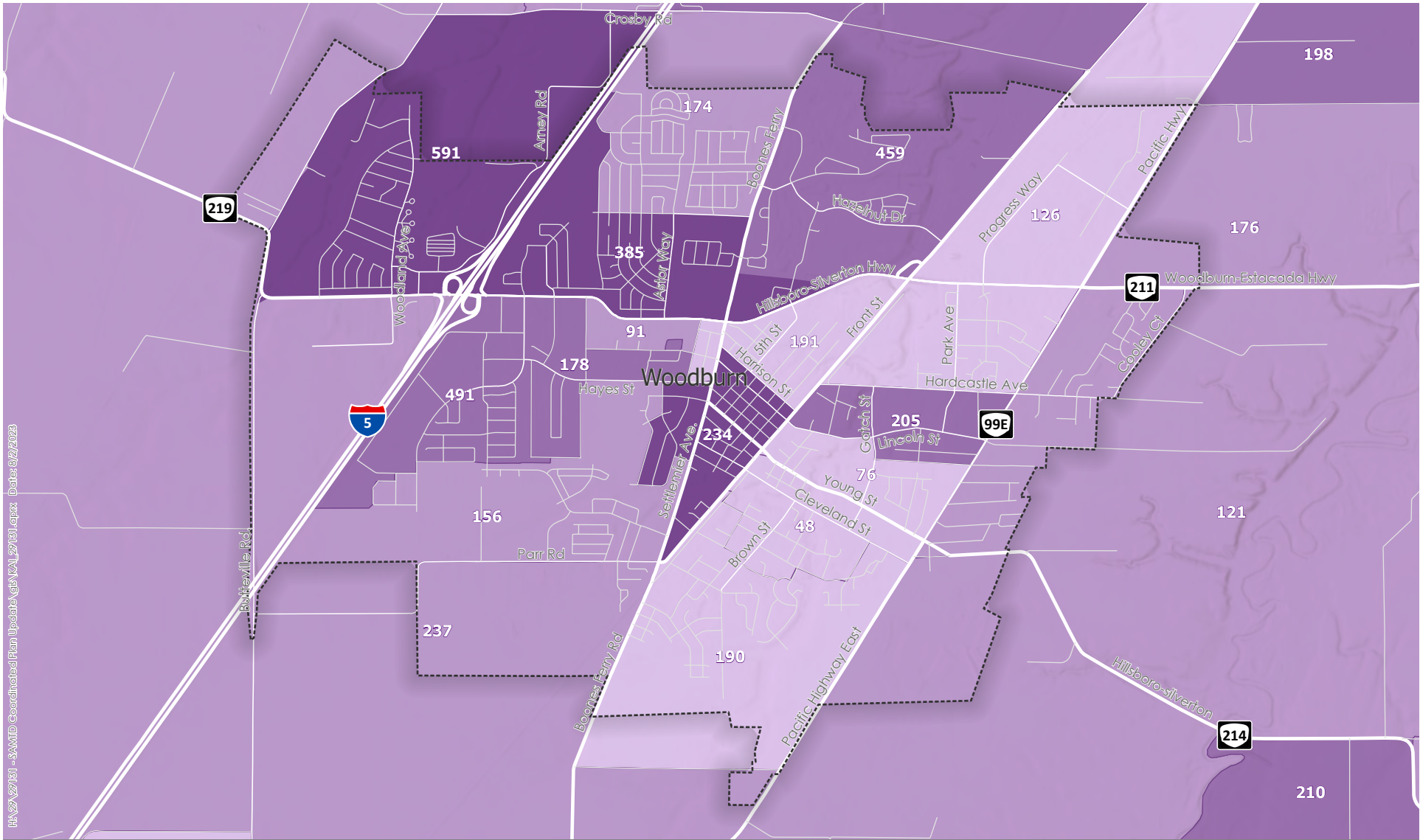
- 1% - 9%
- 10% - 16%
- 17% - 24%
- 25% - 40%

- County Boundary
- UGB



Figure 3

**Population with Disabilities  
Stayton, OR**



HA22 2781 - SAMID Coordinated Plan Update GIS V1 2781.aprx Date: 8/2/2023

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

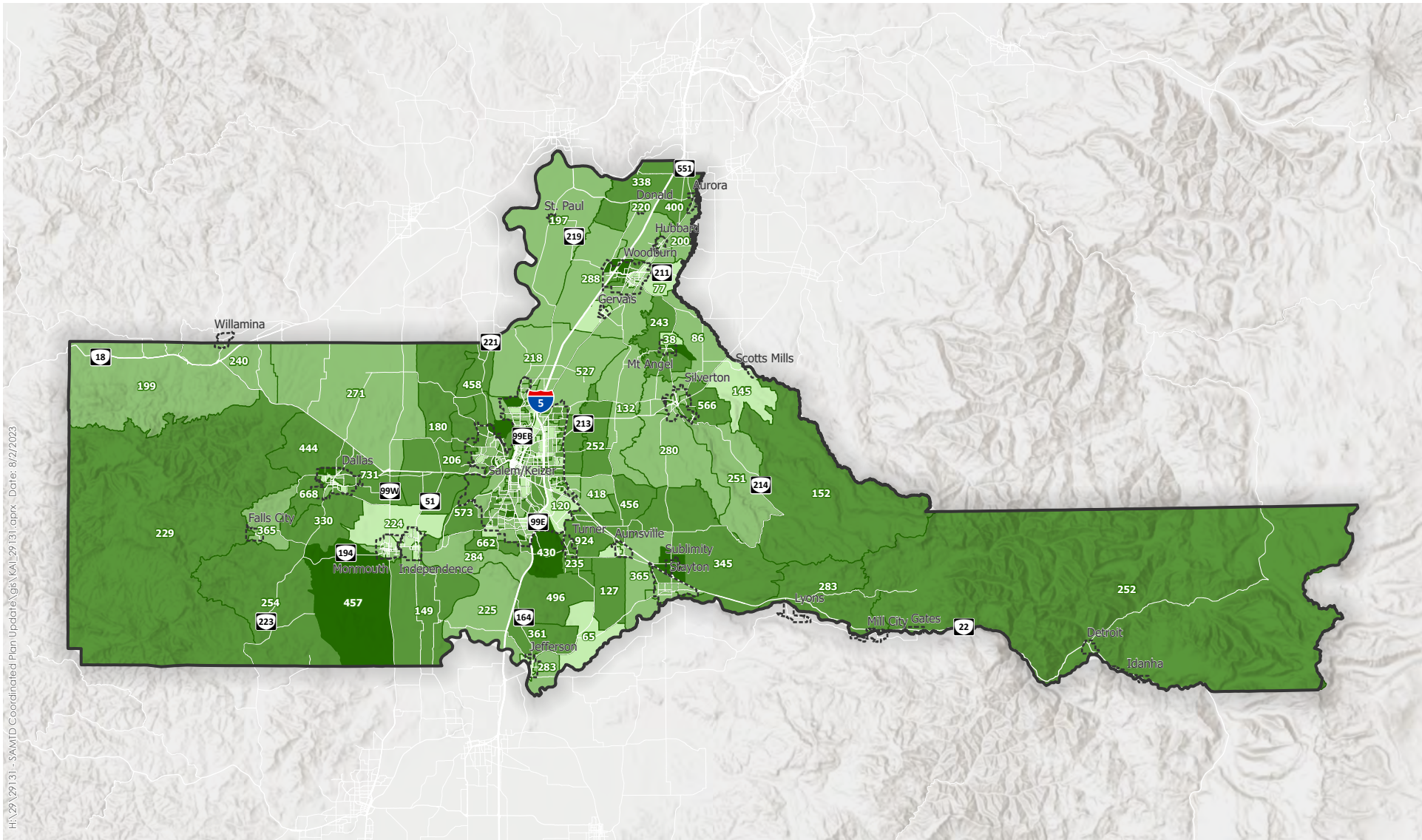
- 1% - 9%
- 10% - 16%
- 17% - 24%
- 25% - 40%

County Boundary  
 UGB

0 1 Miles

Figure 3

**Population with Disabilities  
Woodburn, OR**



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

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

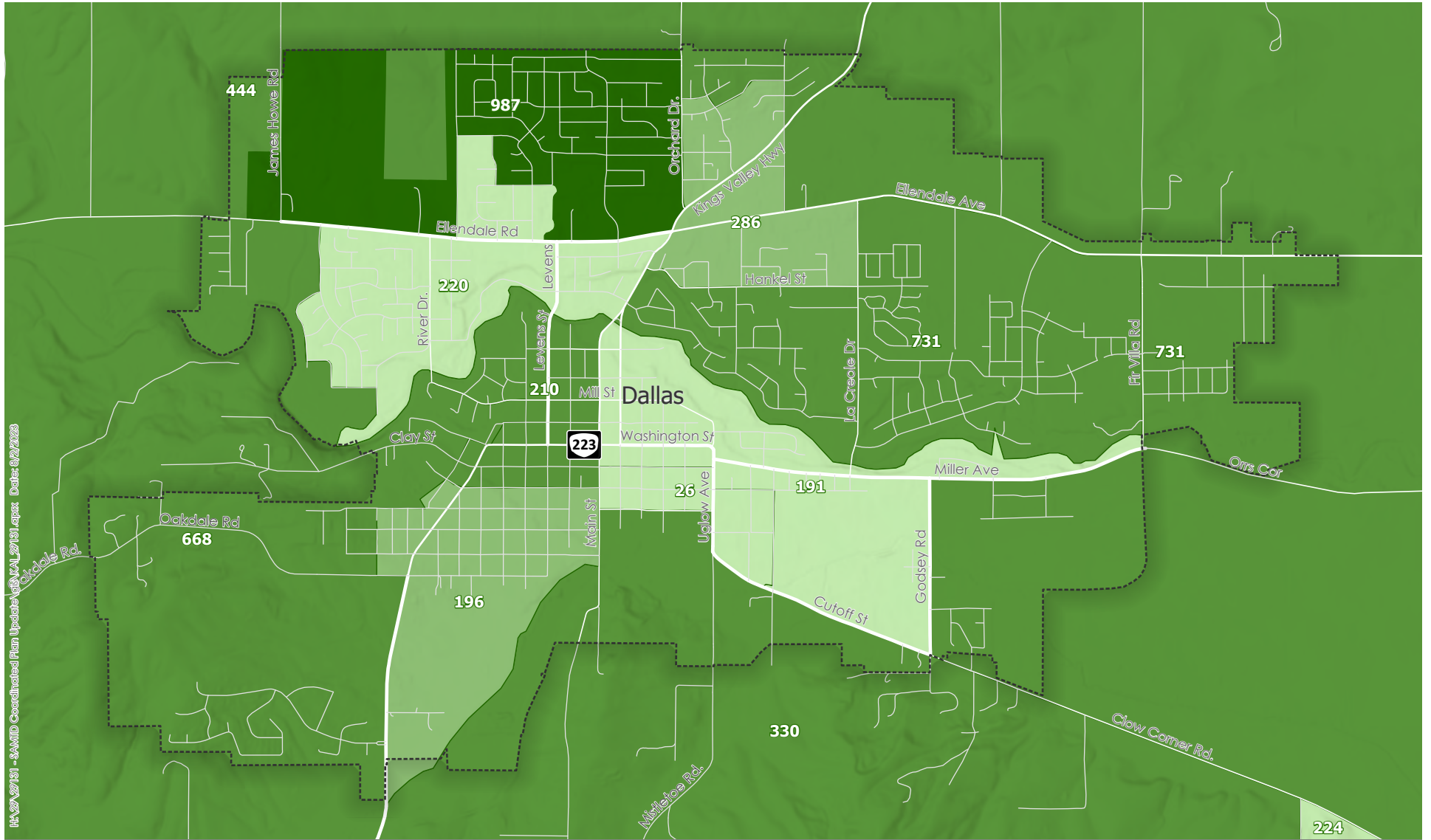
- 1% - 10%
- 11% - 20%
- 21% - 34%
- 35% - 76%

- County Boundary
- UGB



Figure 4

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



HAZA 20181 - SAND Coordinated Plan Update (SNA) 20181.aprx Date: 8/2/2018

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

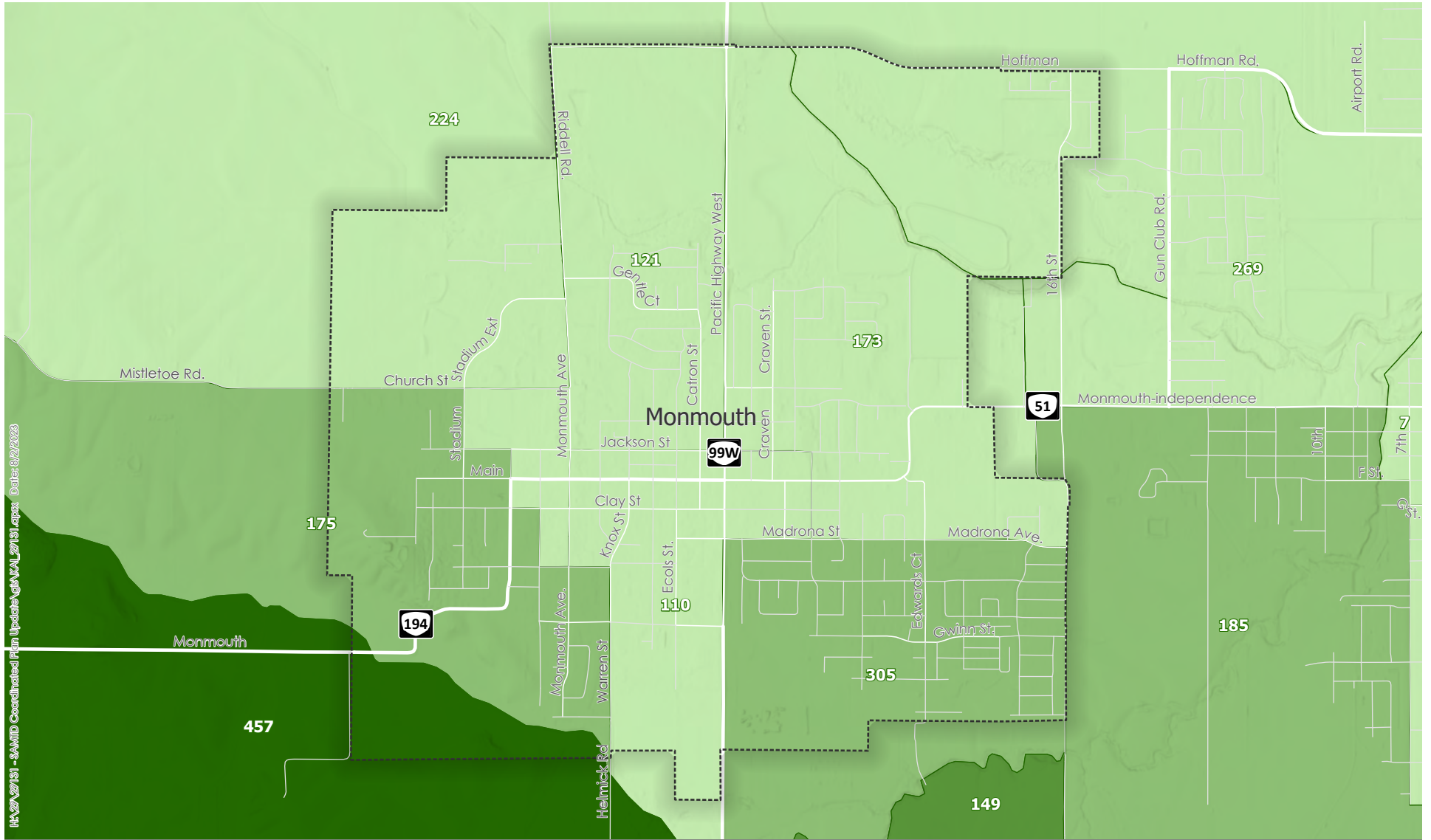
- 1% - 10%
- 11% - 20%
- 21% - 34%
- 35% - 76%

- County Boundary
- UGB



Figure 4

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



H:\2024\2024131 - SAND Coordinated Plan Update\GIS\Map\2024131.aprx Date: 8/2/2023

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

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

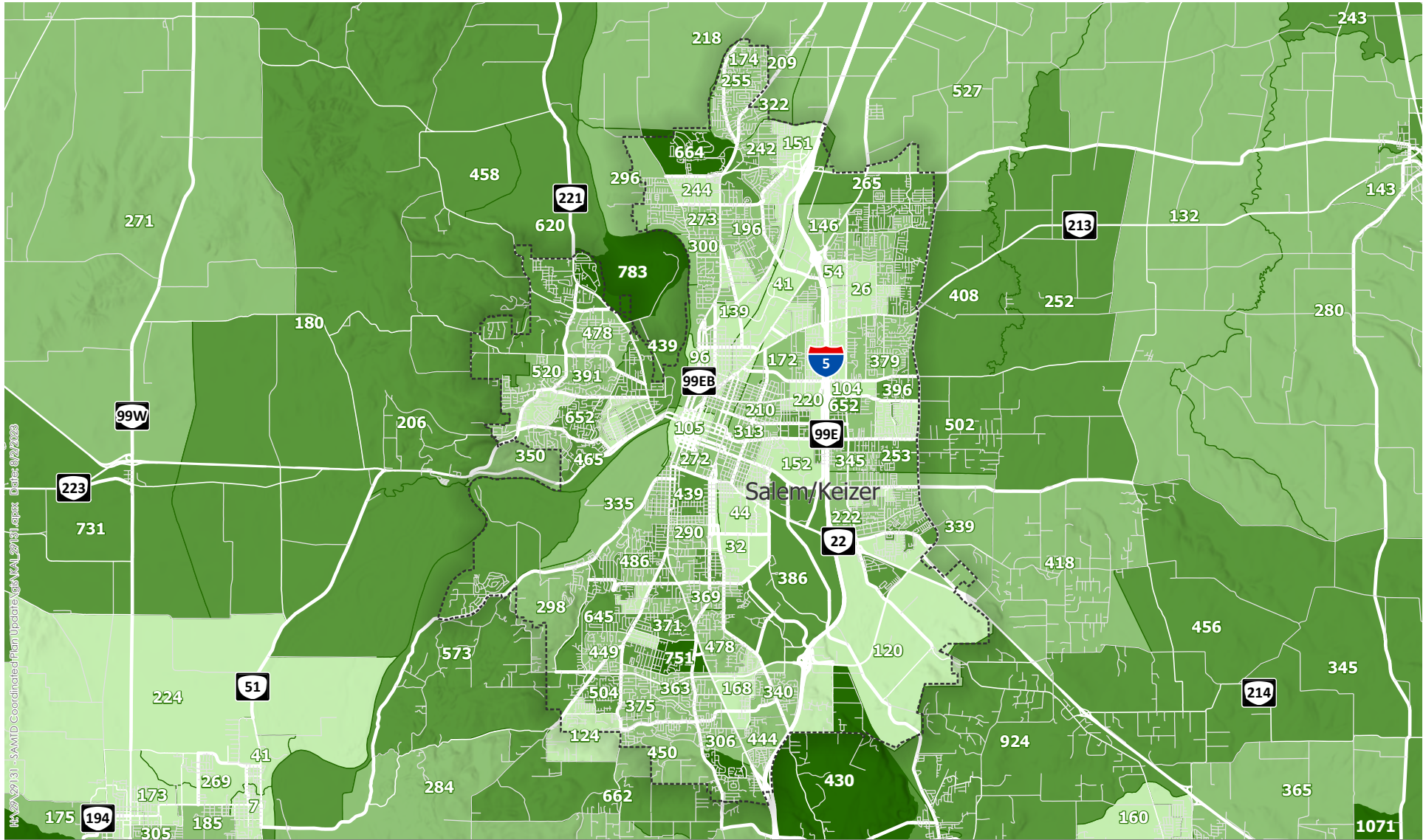
- County Boundary
- UGB



Figure 4

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





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

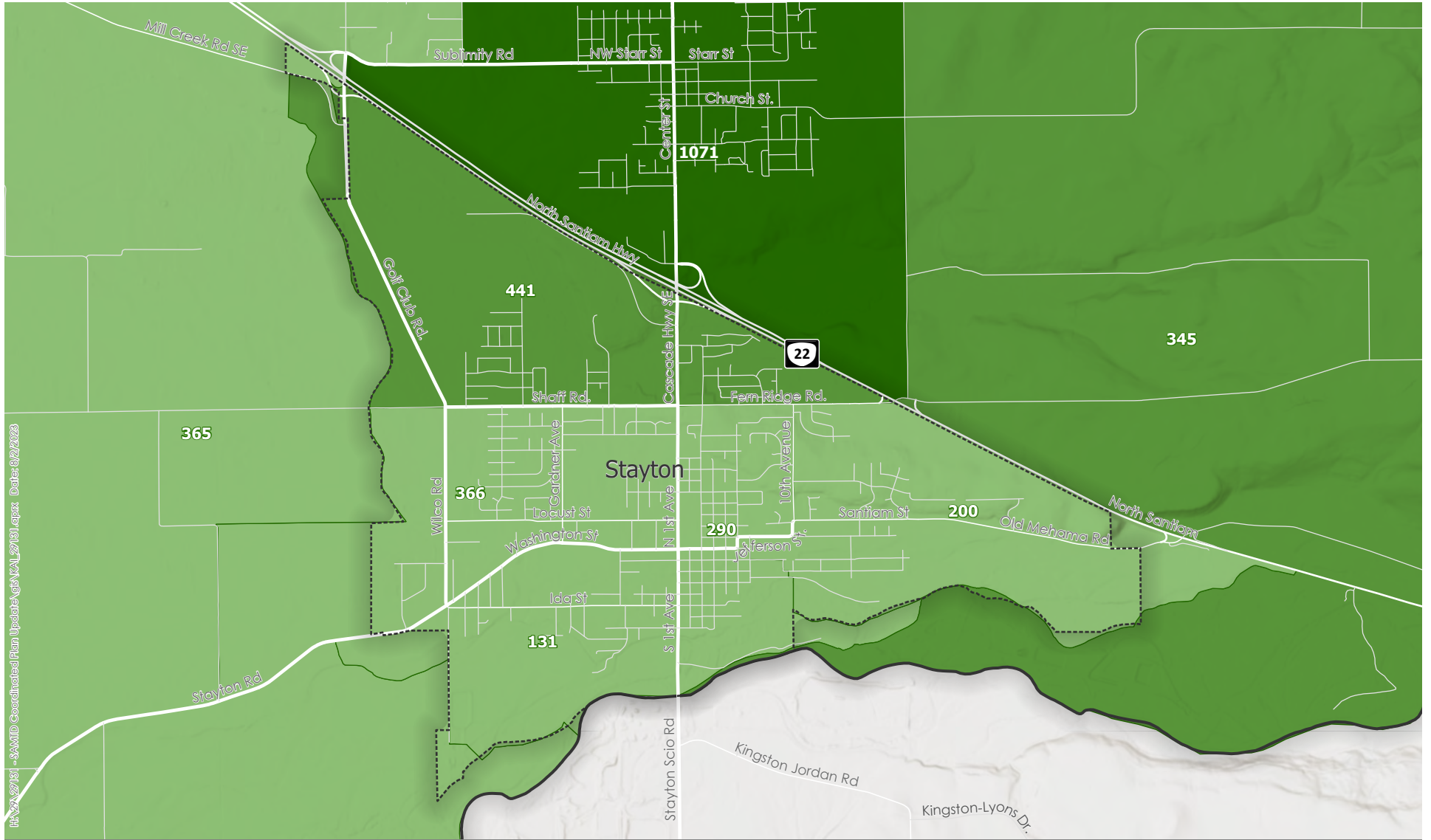
- 1% - 10%
- 11% - 20%
- 21% - 34%
- 35% - 76%

- County Boundary
- UGB



Figure 4

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



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

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



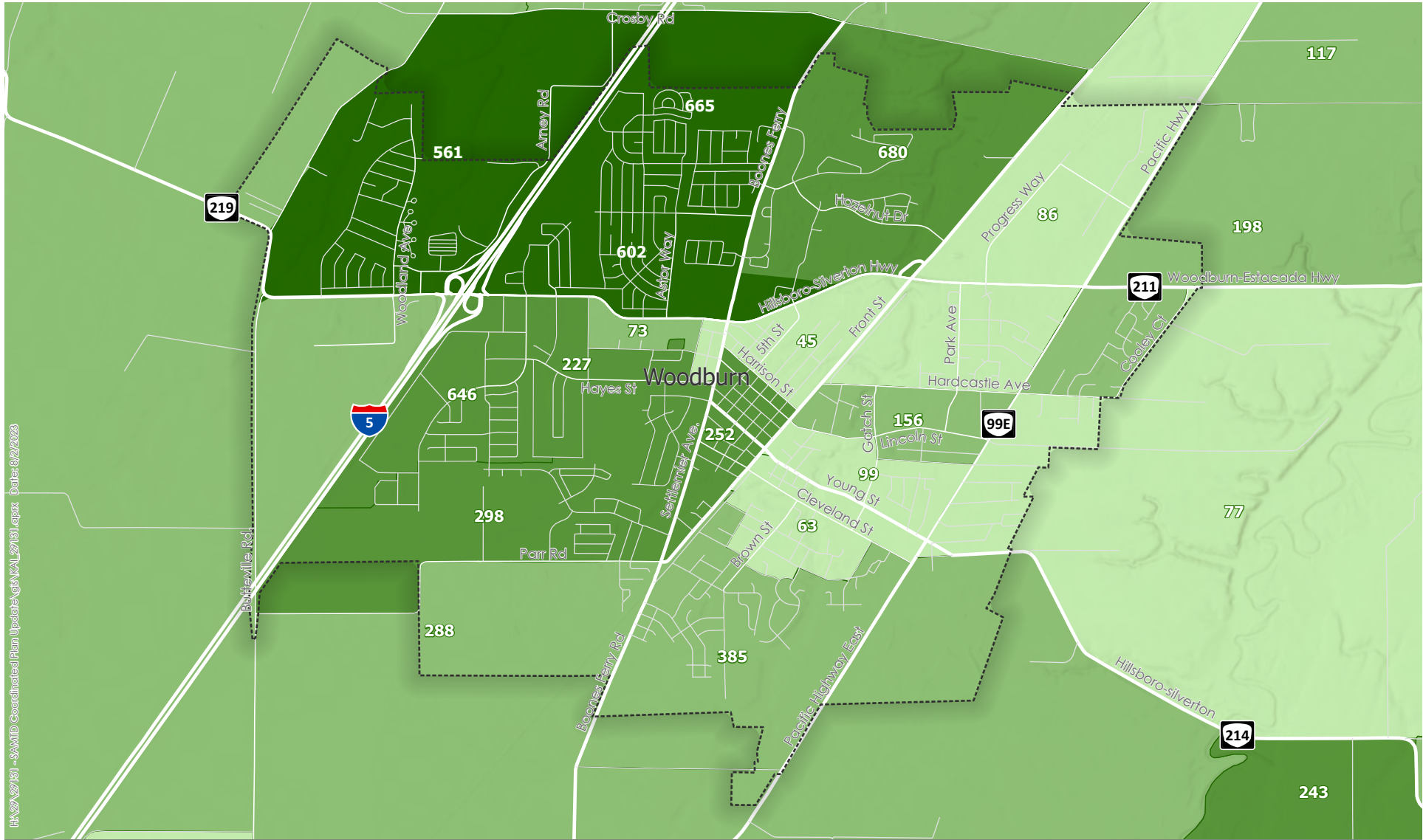
-  County Boundary
-  UGB



Figure 4

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



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

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

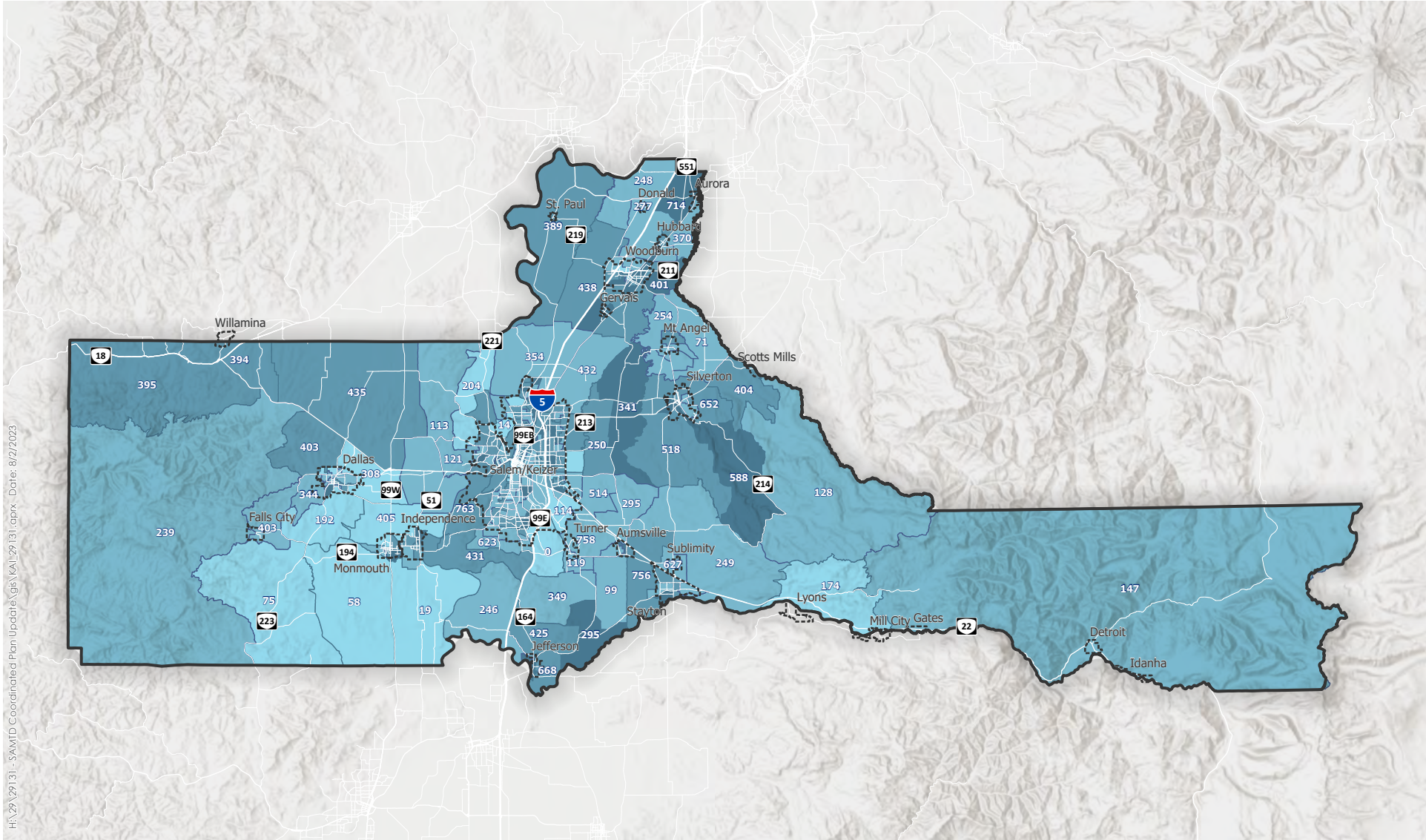
- 1% - 10%
- 11% - 20%
- 21% - 34%
- 35% - 76%

- County Boundary
- UGB



Figure 4

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



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

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

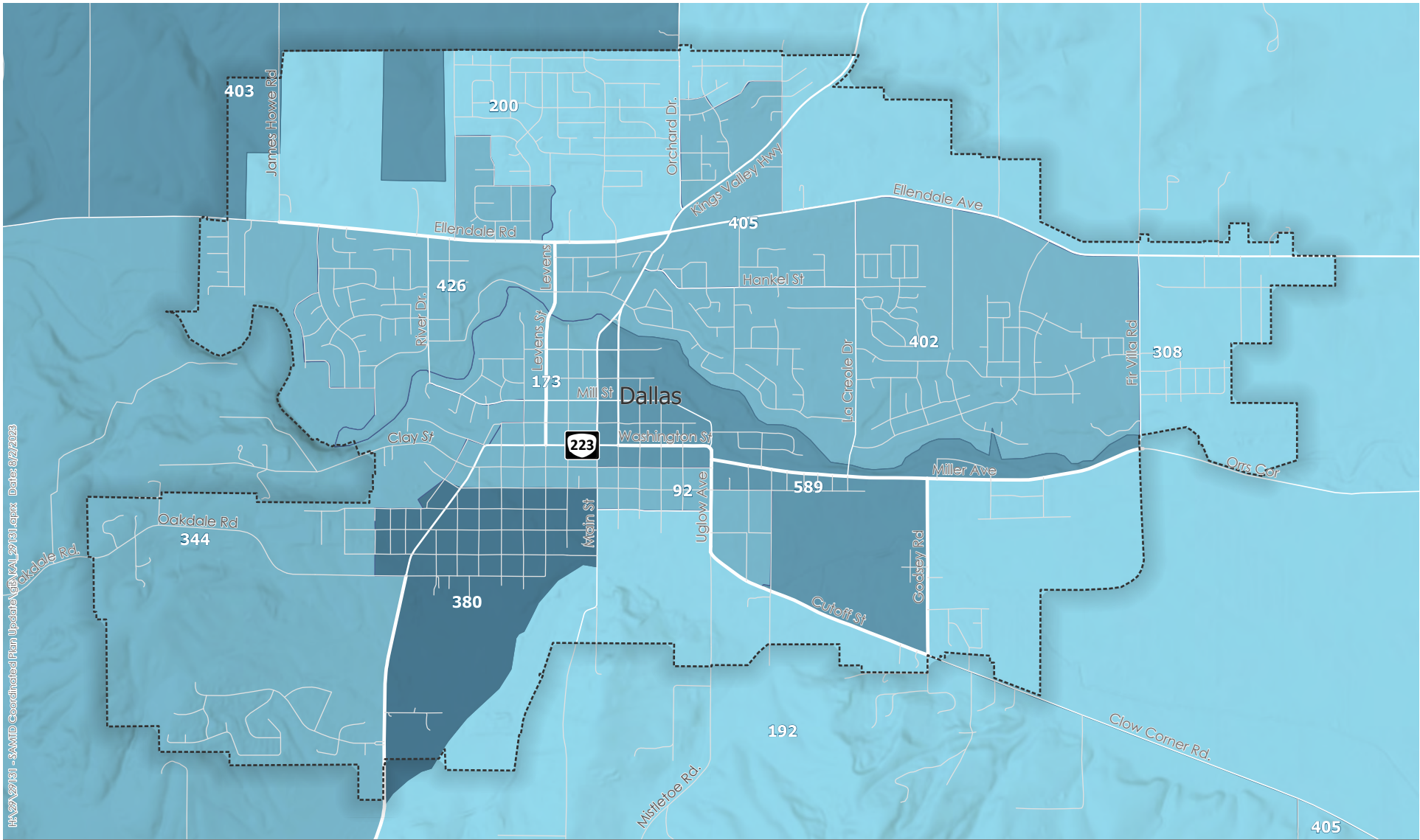
- 0% - 13%
- 14% - 23%
- 24% - 32%
- 33% - 44%

- County Boundary
- UGB



Figure 5

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



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

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

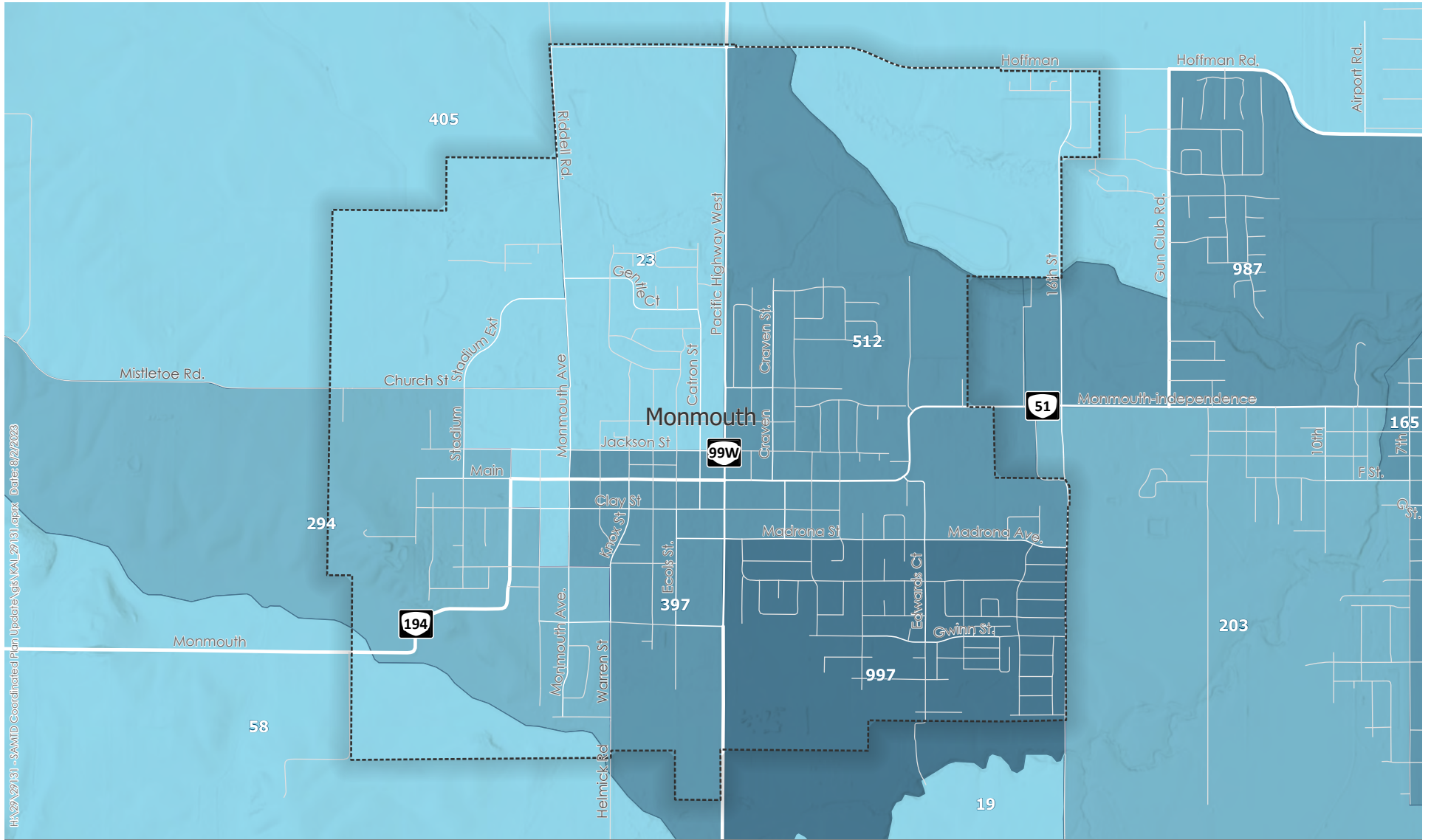
- County Boundary
- UGB

0 0.9 Miles



Figure 5

**Youth Population  
Dallas, OR**



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

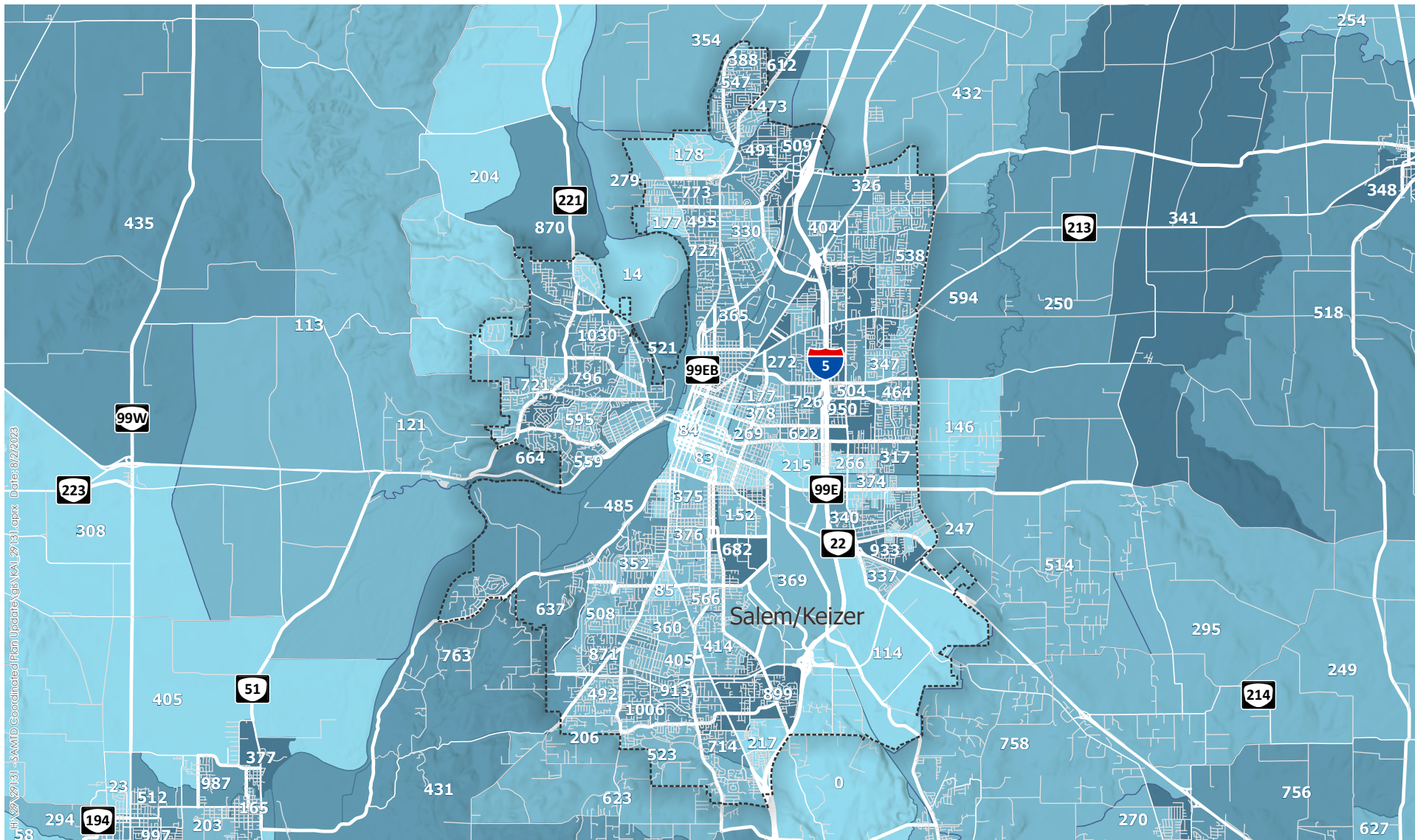
- 0% - 13%
- 14% - 23%
- 24% - 32%
- 33% - 44%

- County Boundary
- UGB



Figure 5

**Youth Population  
Monmouth, OR**



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

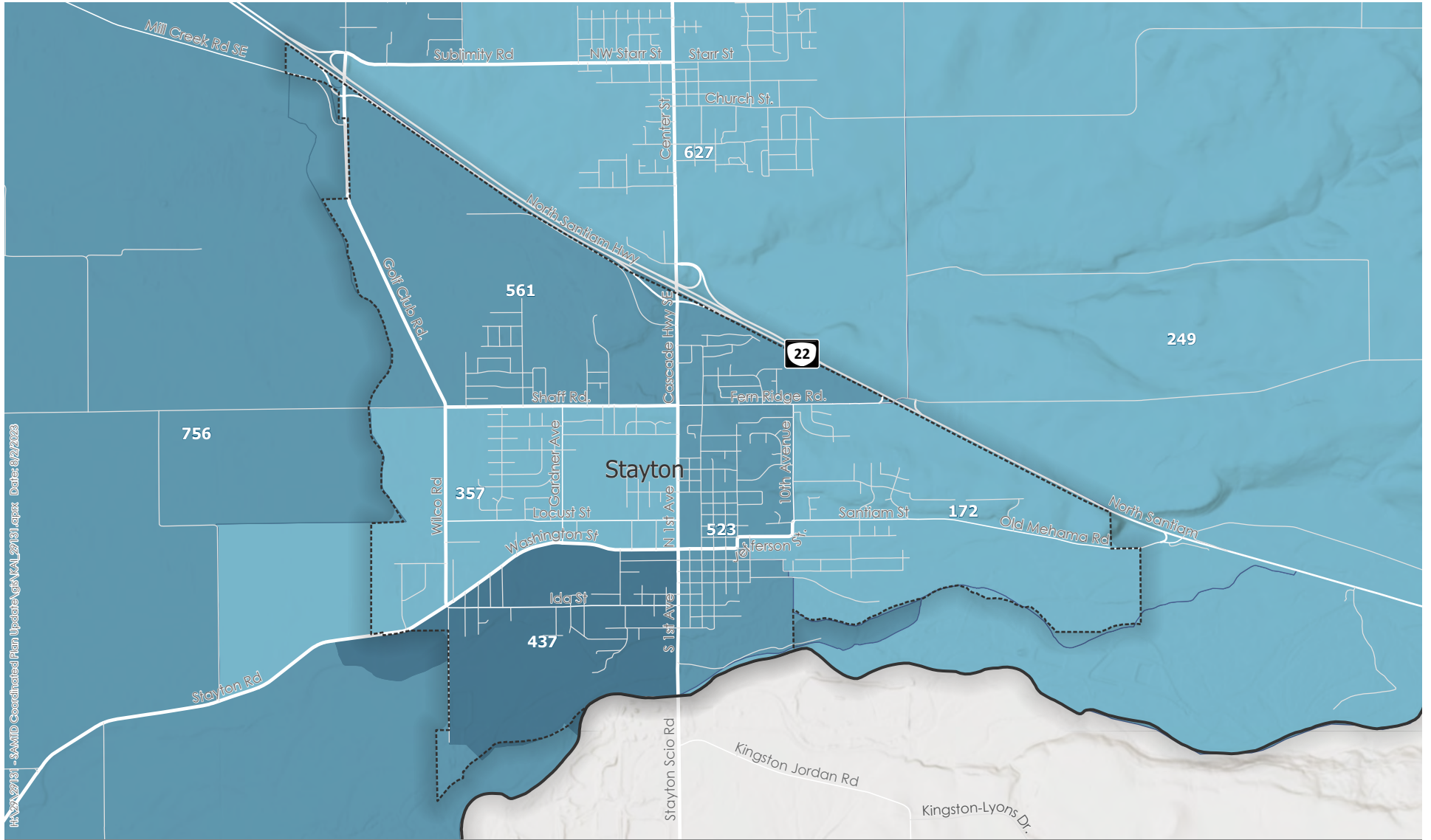
- 0% - 13%
- 14% - 23%
- 24% - 32%
- 33% - 44%

- County Boundary
- UGB



Figure 5

**Youth Population  
Salem/Keizer, OR**



H:\24\_27131 - SAMID Coordinated Plan Update\GIS\Map\_27131.aprx Date: 8/2/2023

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

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

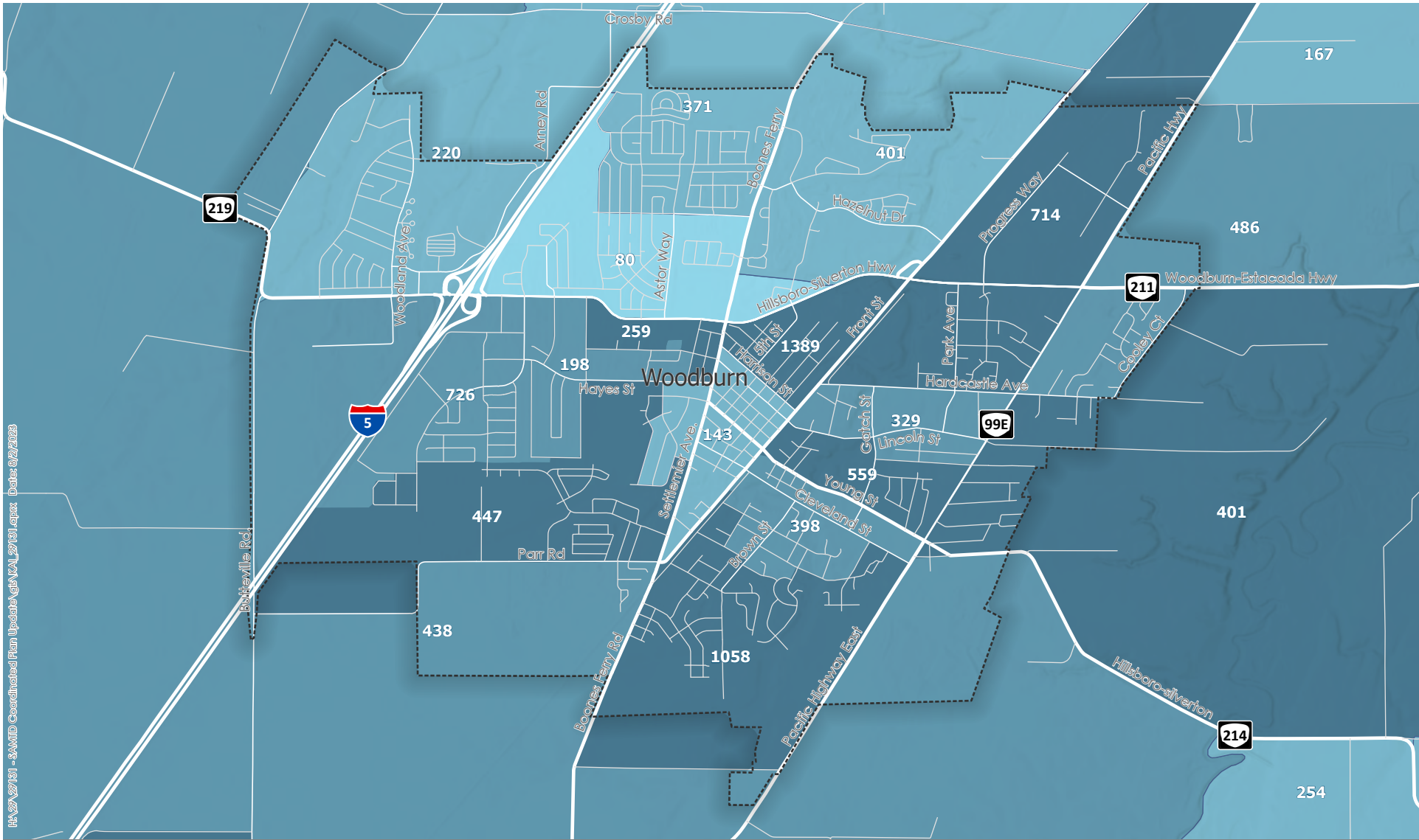
- County Boundary
- UGB



Figure 5

**Youth Population  
Stayton, OR**





HA22A\_27131 - SAMID Coordinated Plan Update GIS V1.1\_27131.aprx Date: 8/2/2023

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

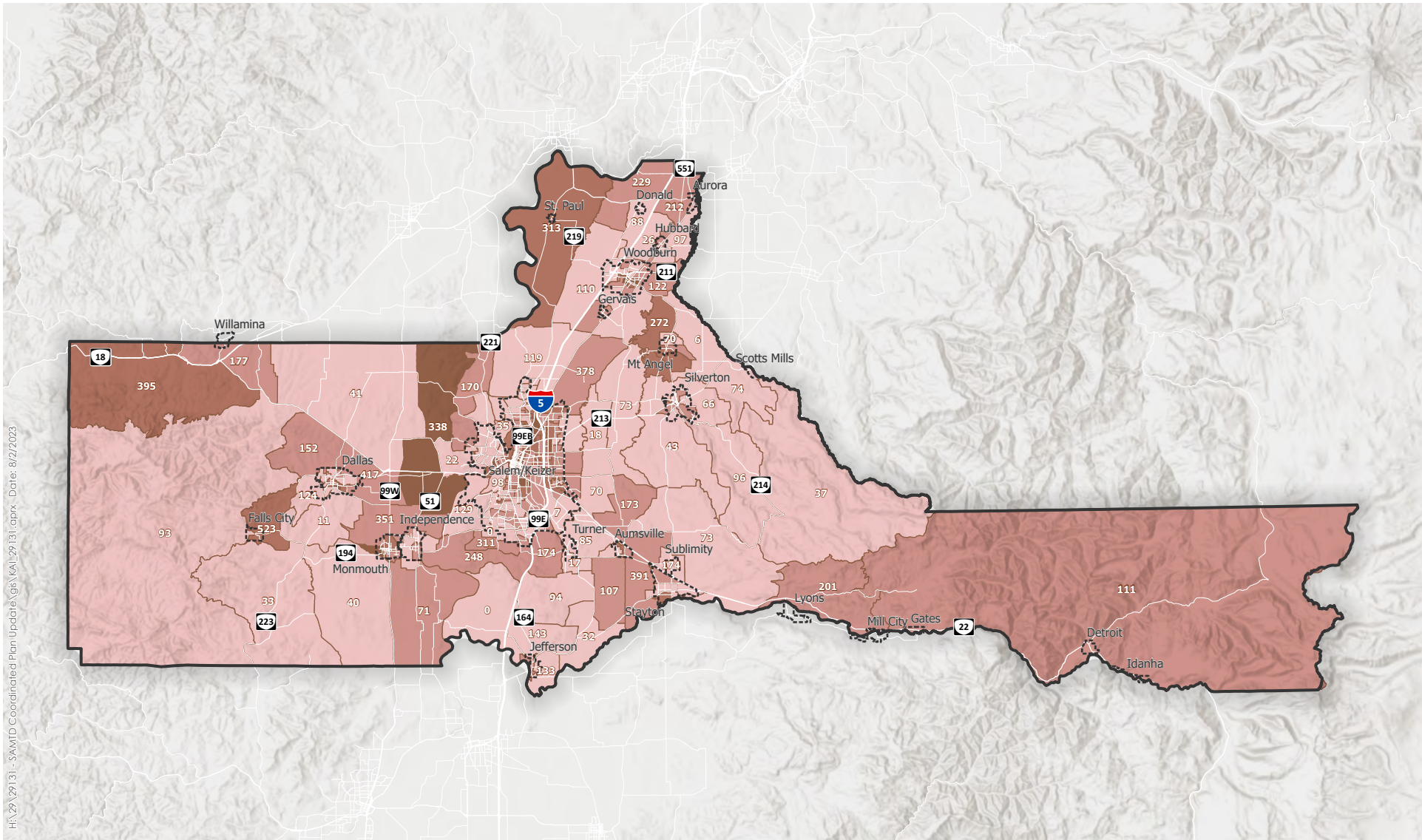
- 0% - 13%
- 14% - 23%
- 24% - 32%
- 33% - 44%

- County Boundary
- UGB



Figure 5

**Youth Population  
Woodburn, OR**



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

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

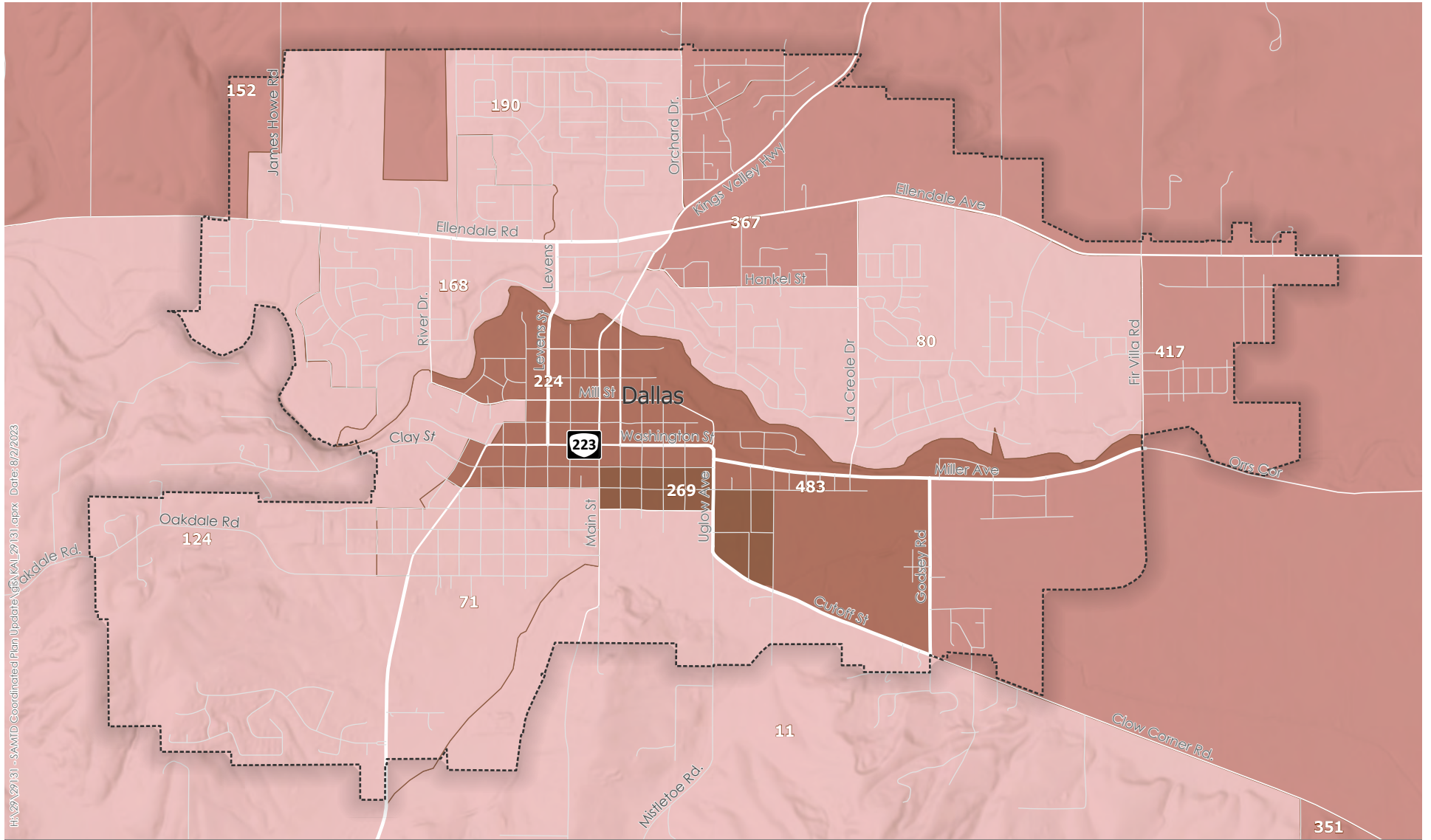
- 0% - 9%
- 9% - 20%
- 21% - 35%
- 35% - 63%

- County Boundary
- UGB



Figure 7

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



H:\23\29131 - SAMTD Coordinated Plan Update\GIS\KAL 29131.aprx Date: 8/2/2023

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

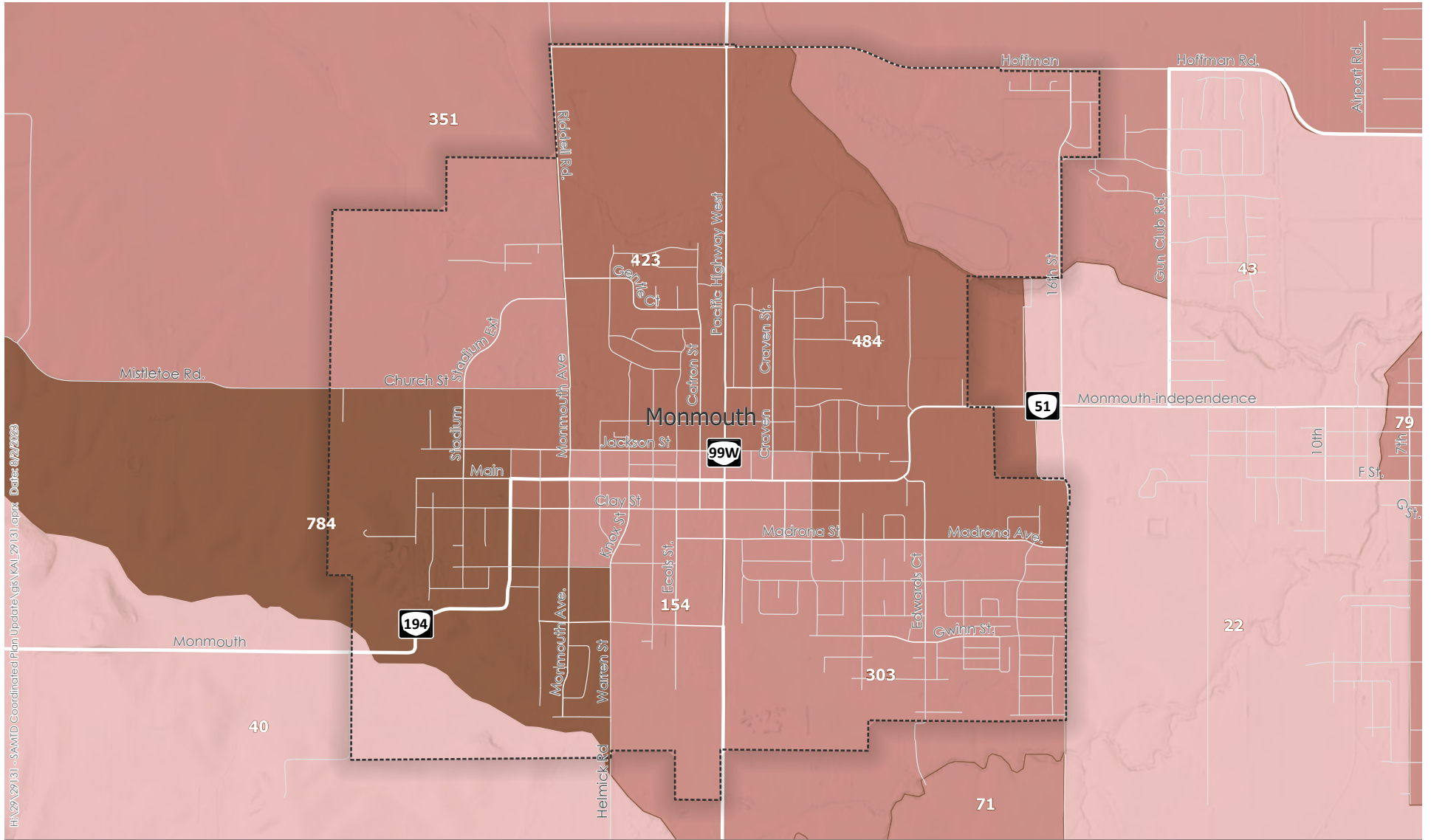
- 0% - 9%
- 9% - 20%
- 21% - 35%
- 35% - 63%

- County Boundary
- UGB



Figure 7

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



HY29\29131 - SAMTD Coordinated Plan Update\GIS\KAL\_29131.aprx Date: 8/2/2023

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

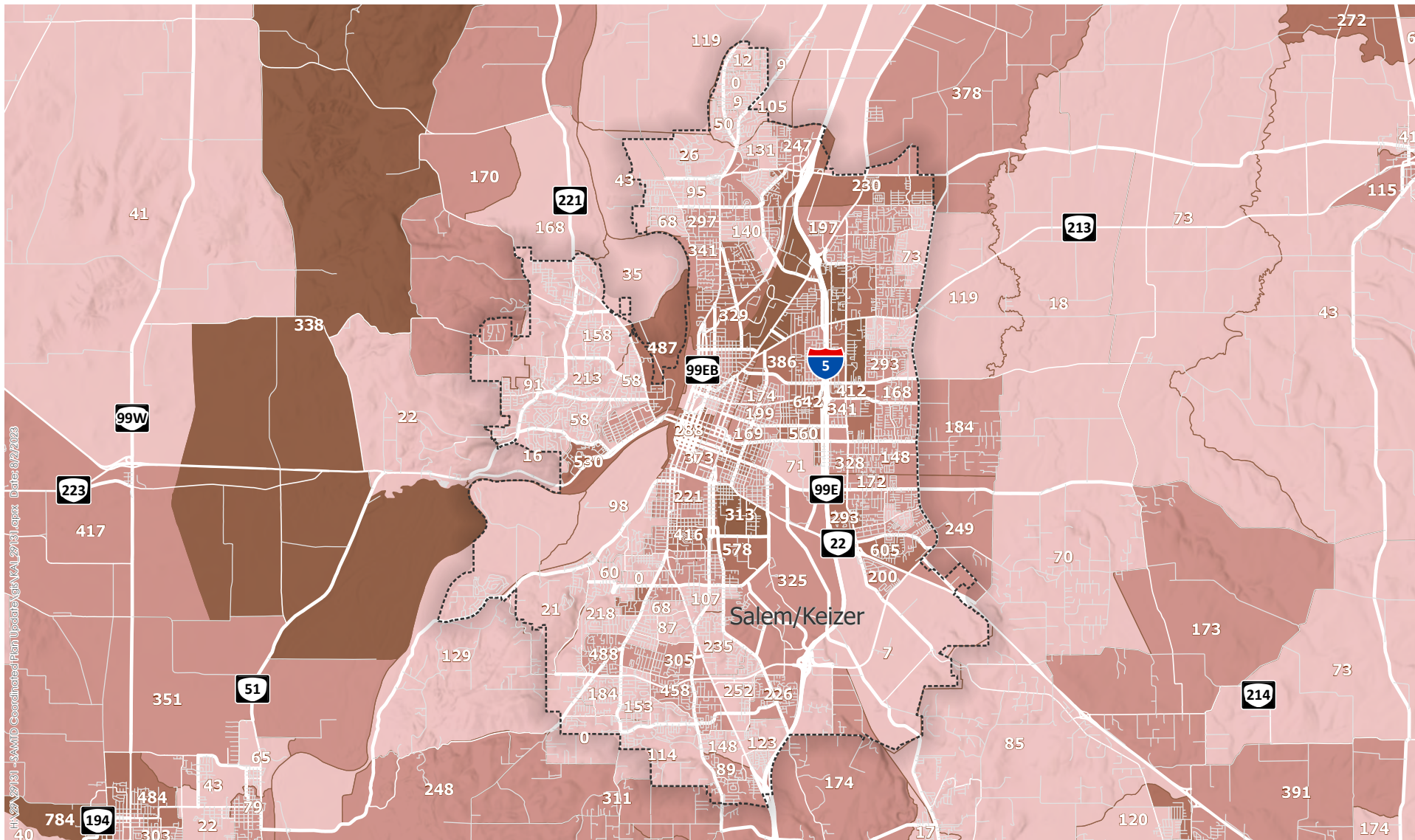
- 0% - 9%
- 9% - 20%
- 21% - 35%
- 35% - 63%

- County Boundary
- UGB



Figure 7

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



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

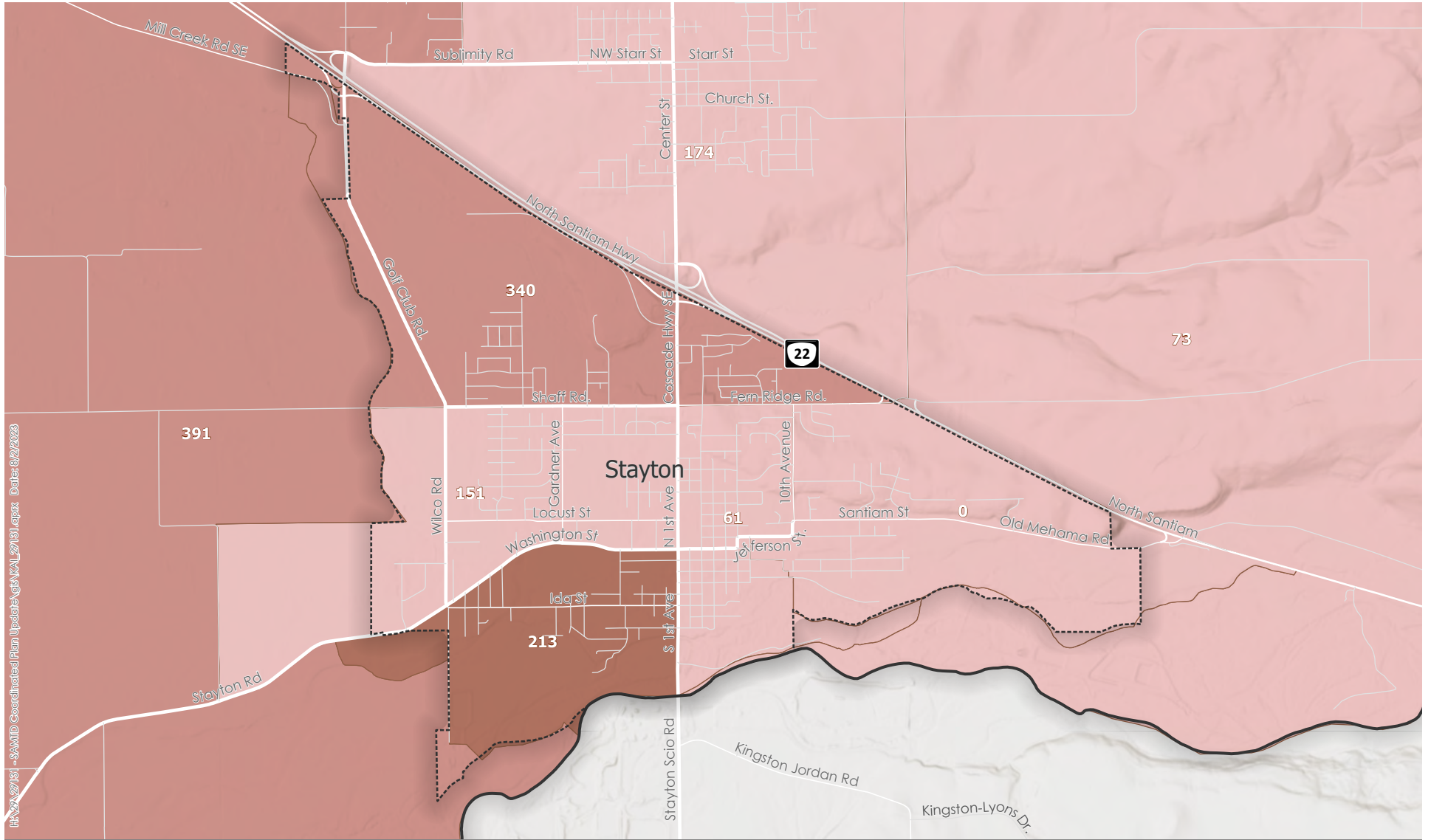
- 0% - 9%
- 9% - 20%
- 21% - 35%
- 35% - 63%

- County Boundary
- UGB



Figure 7

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



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

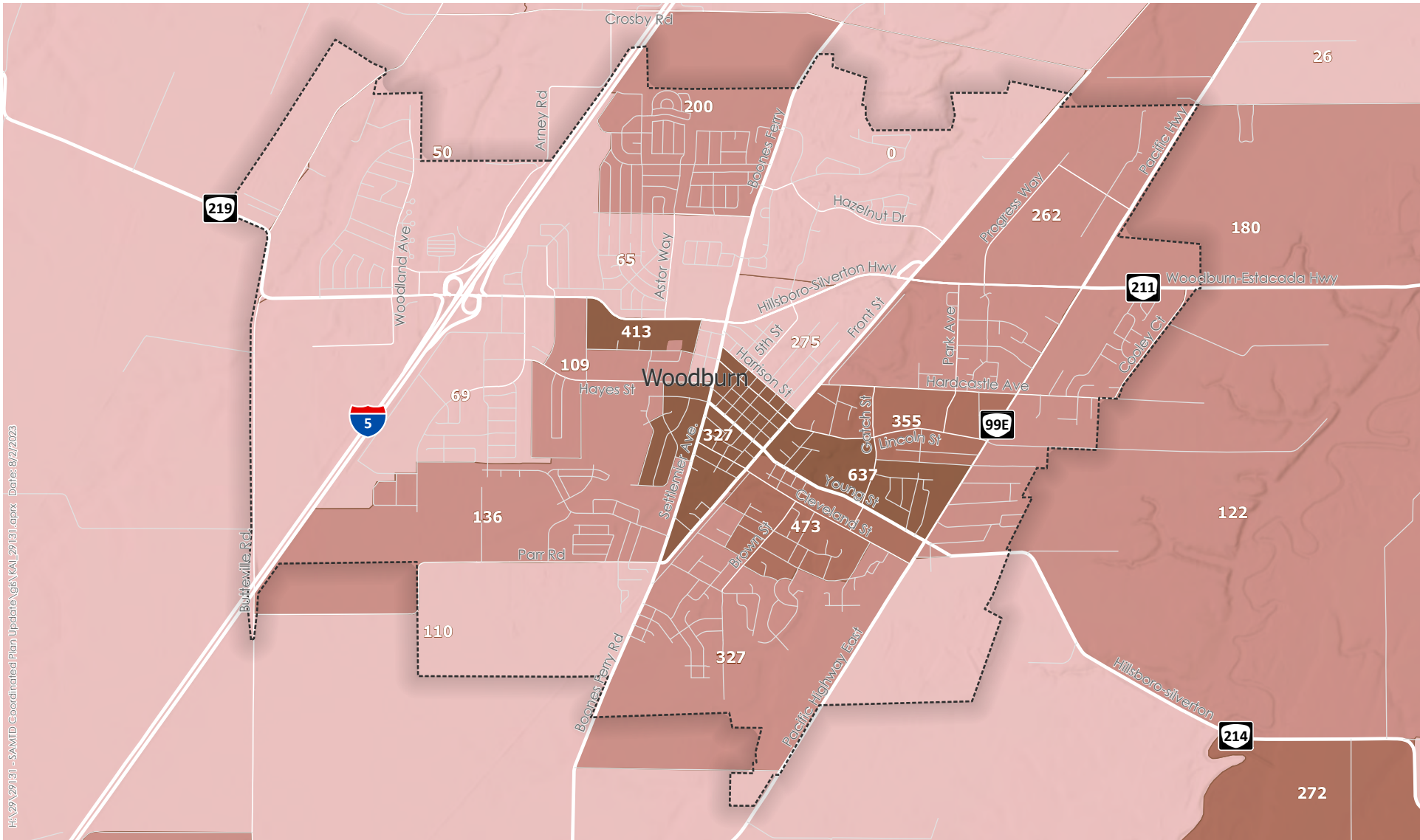
- 0% - 9%
- 9% - 20%
- 21% - 35%
- 35% - 63%

- County Boundary
- UGB







Figure 7

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



HY29\29131 - SAMTD Coordinated Plan Update\GIS\KAL 29131.aprx Date: 8/2/2023

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

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



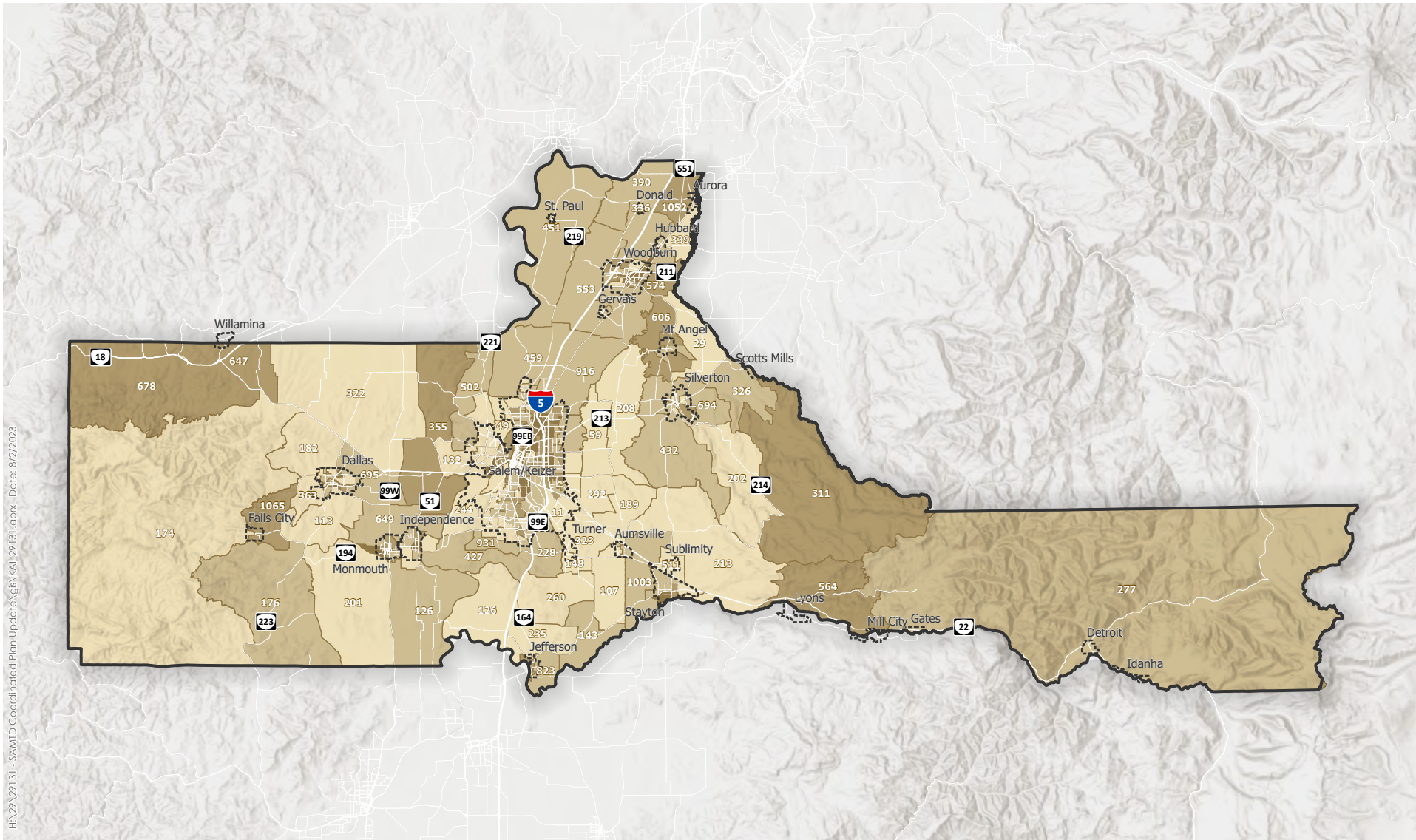
-  County Boundary
-  UGB



Figure 7



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



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

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

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

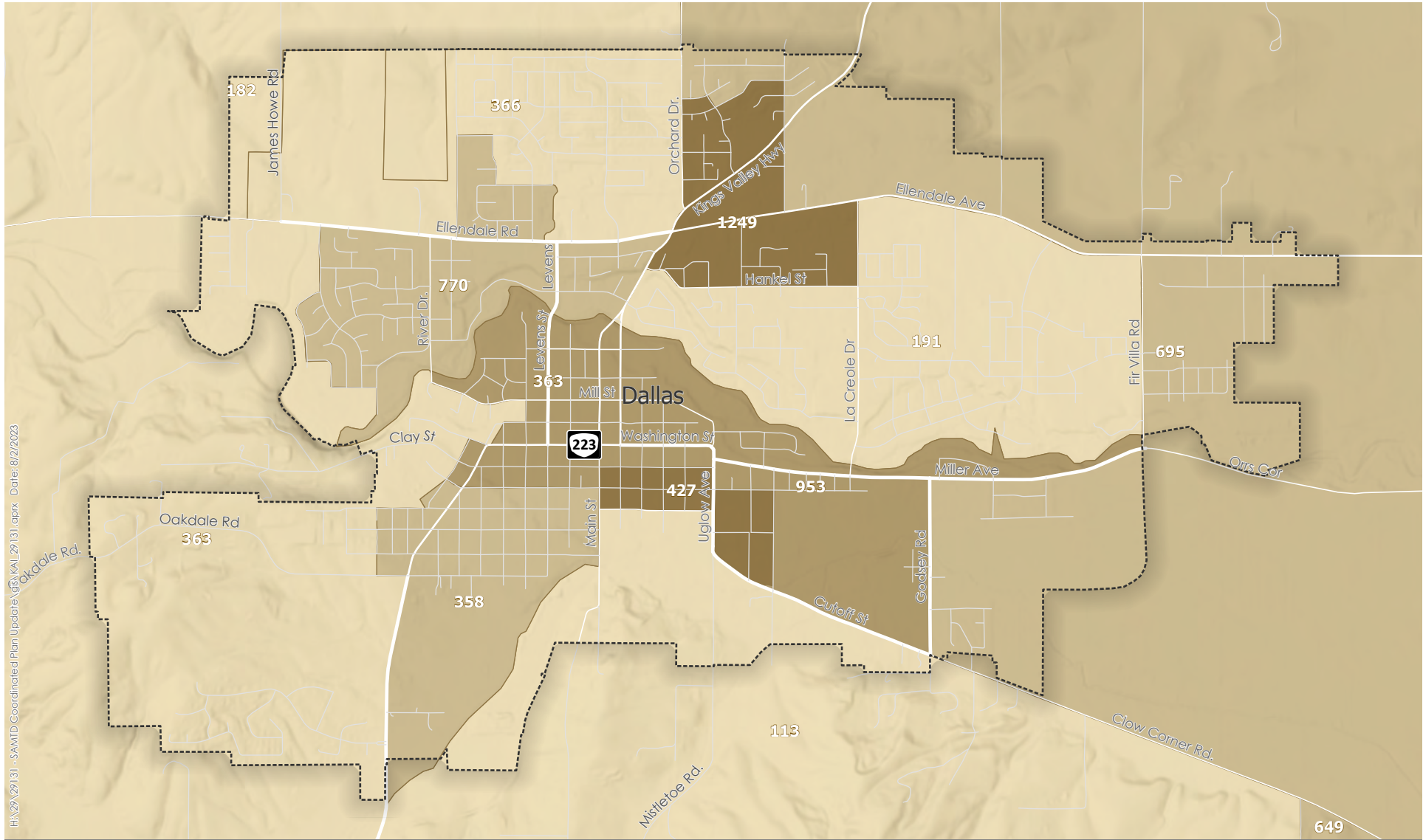
 County Boundary  
 UGB

0 |-----| 20 Miles 

Figure 6





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





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

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

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



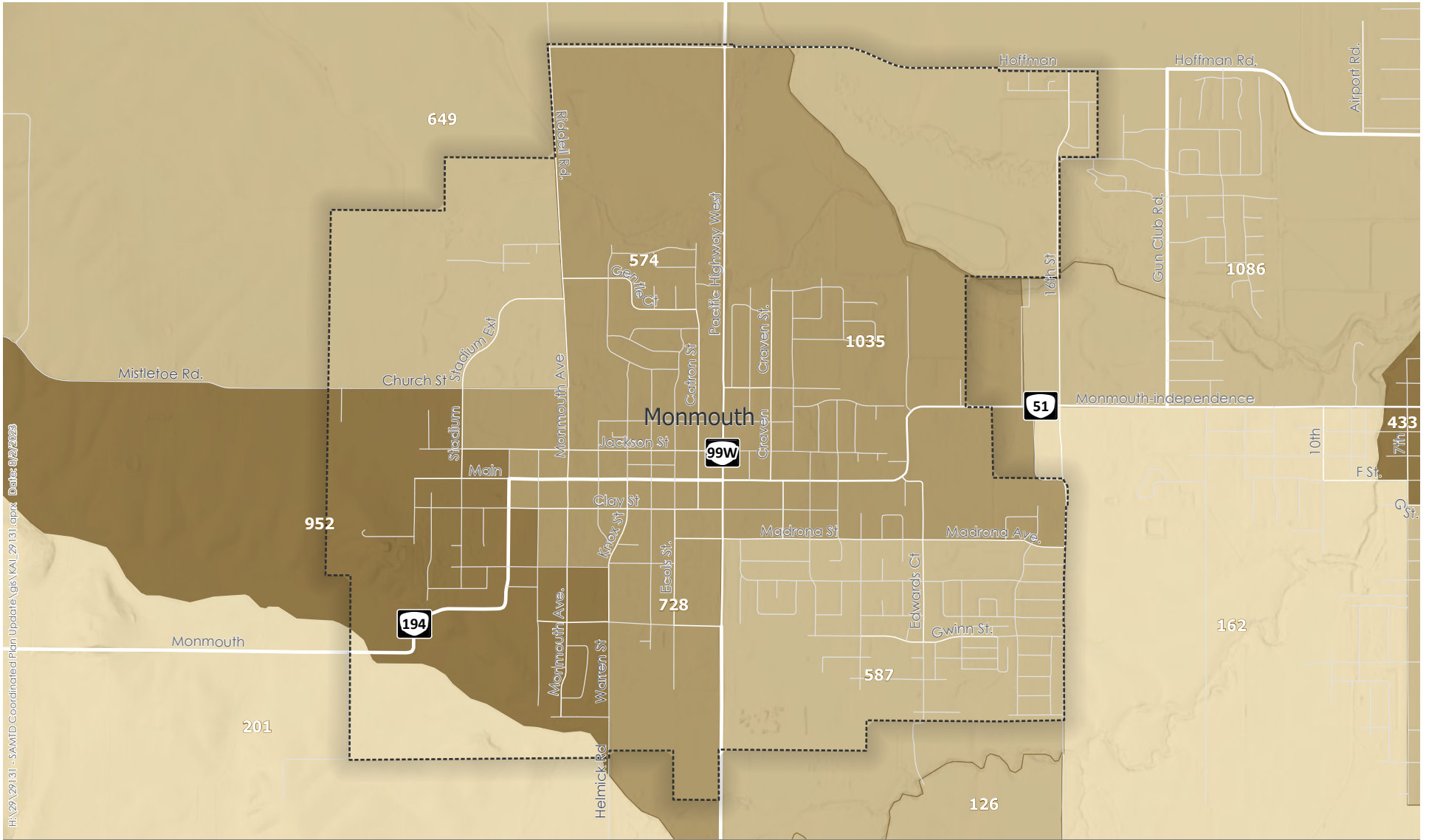
-  County Boundary
-  UGB







Figure 6

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



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

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



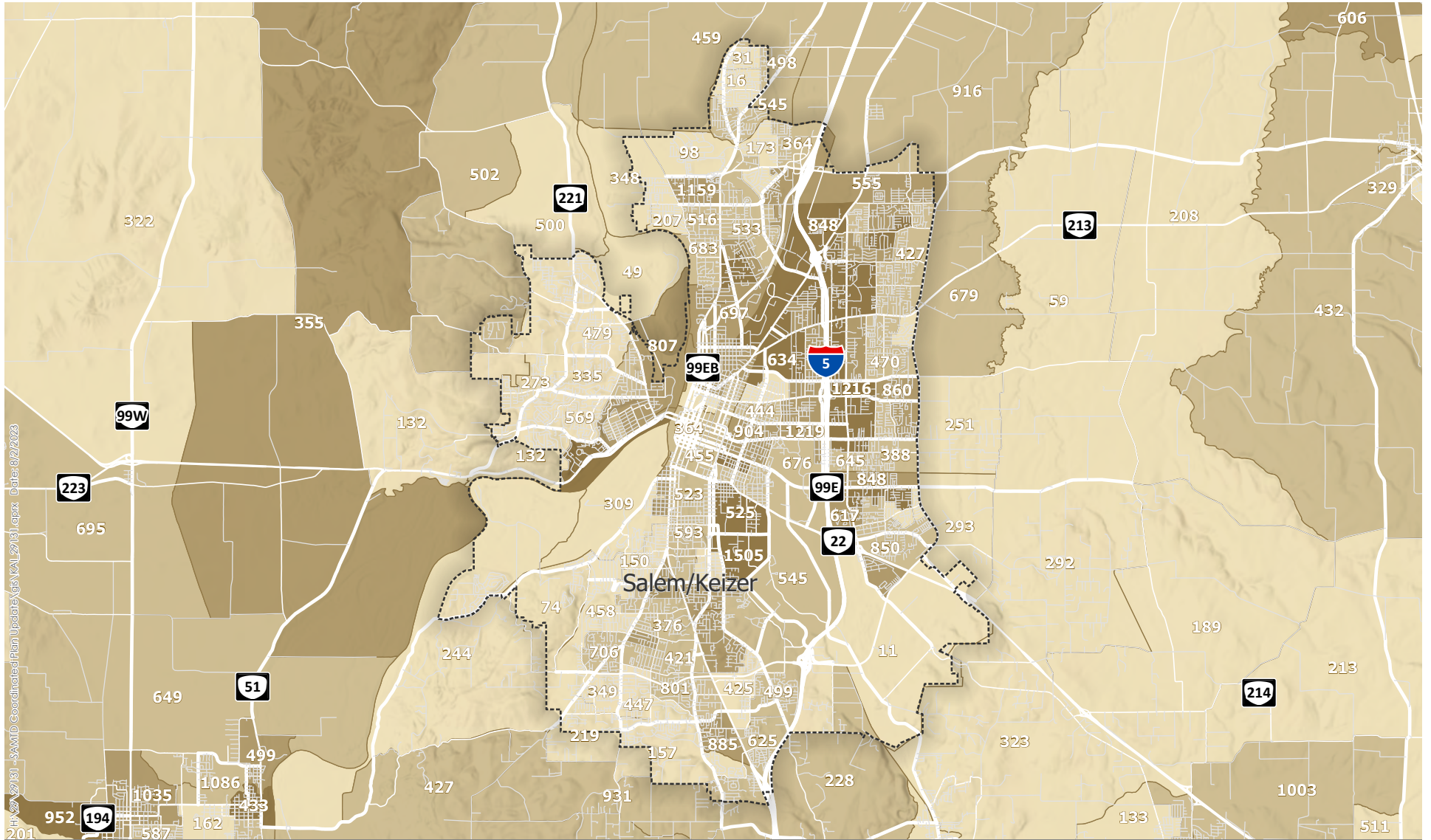
-  County Boundary
-  UGB







Figure 6

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



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

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



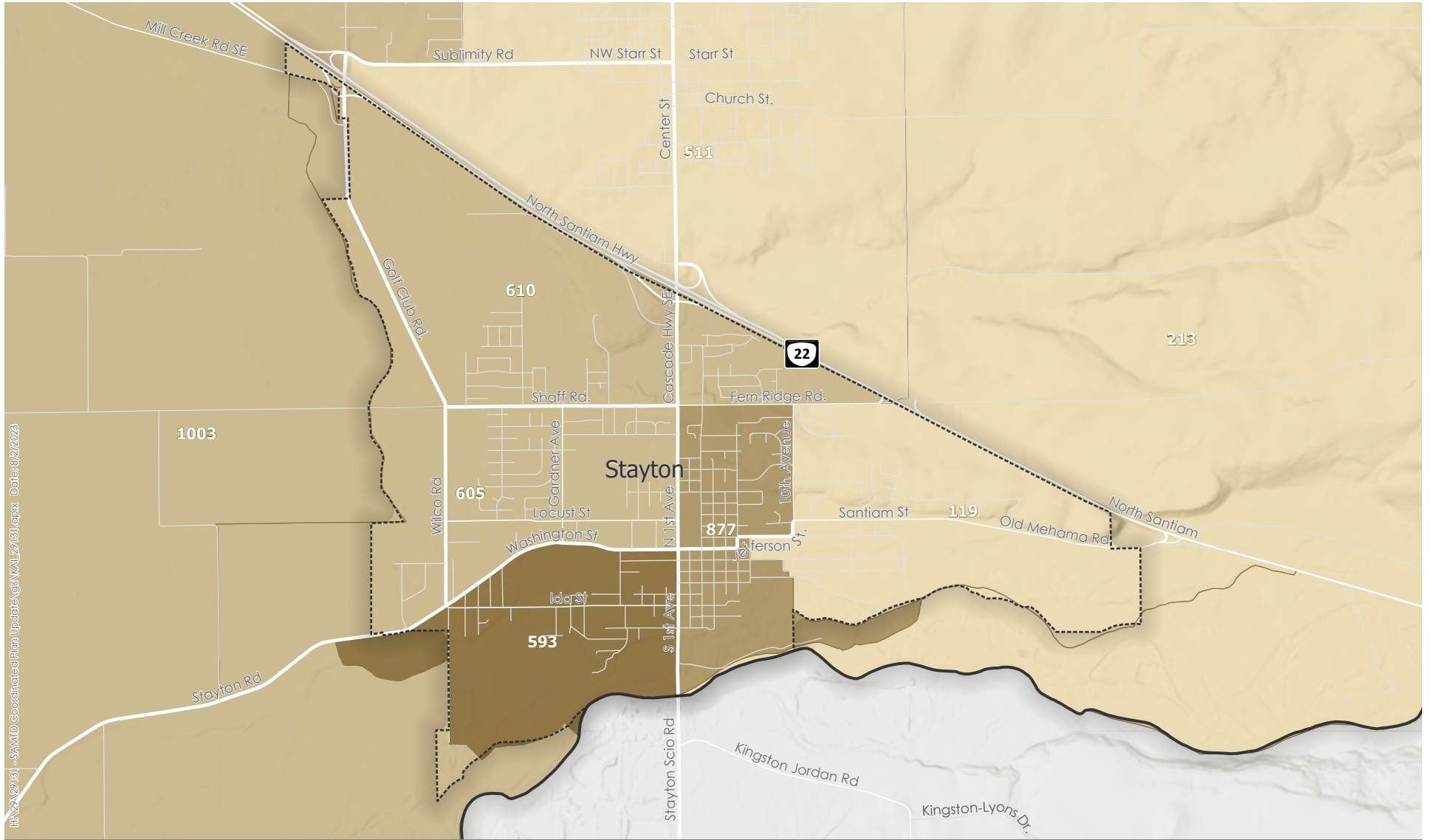
-  County Boundary
-  UGB



Figure 6

**Population Below 200% Poverty  
Salem/Keizer, OR**



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

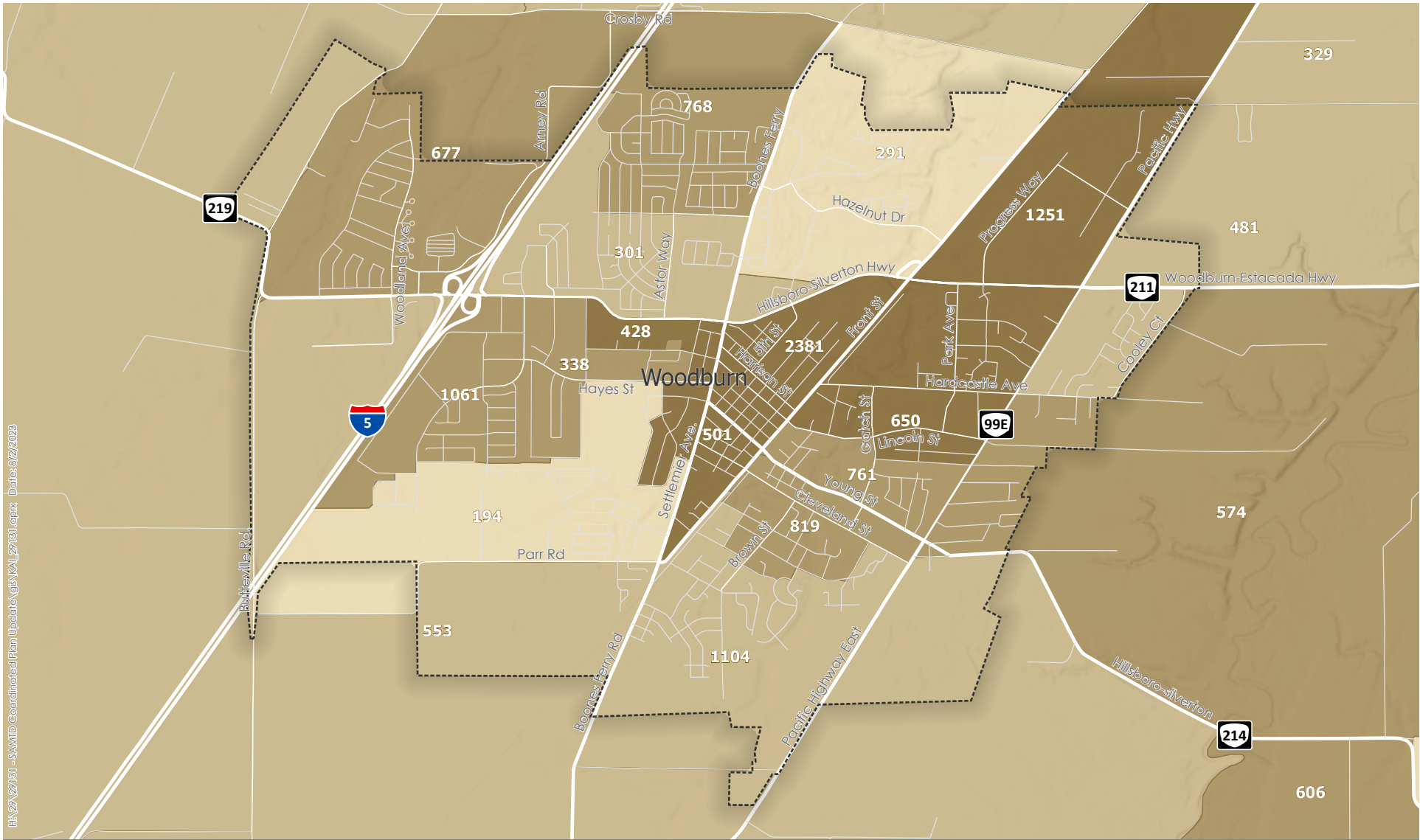
- 0% - 21%
- 21% - 37%
- 37% - 55%
- 55% - 78%

County Boundary  
UGB

0 1 Miles





Figure 6

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



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

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

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



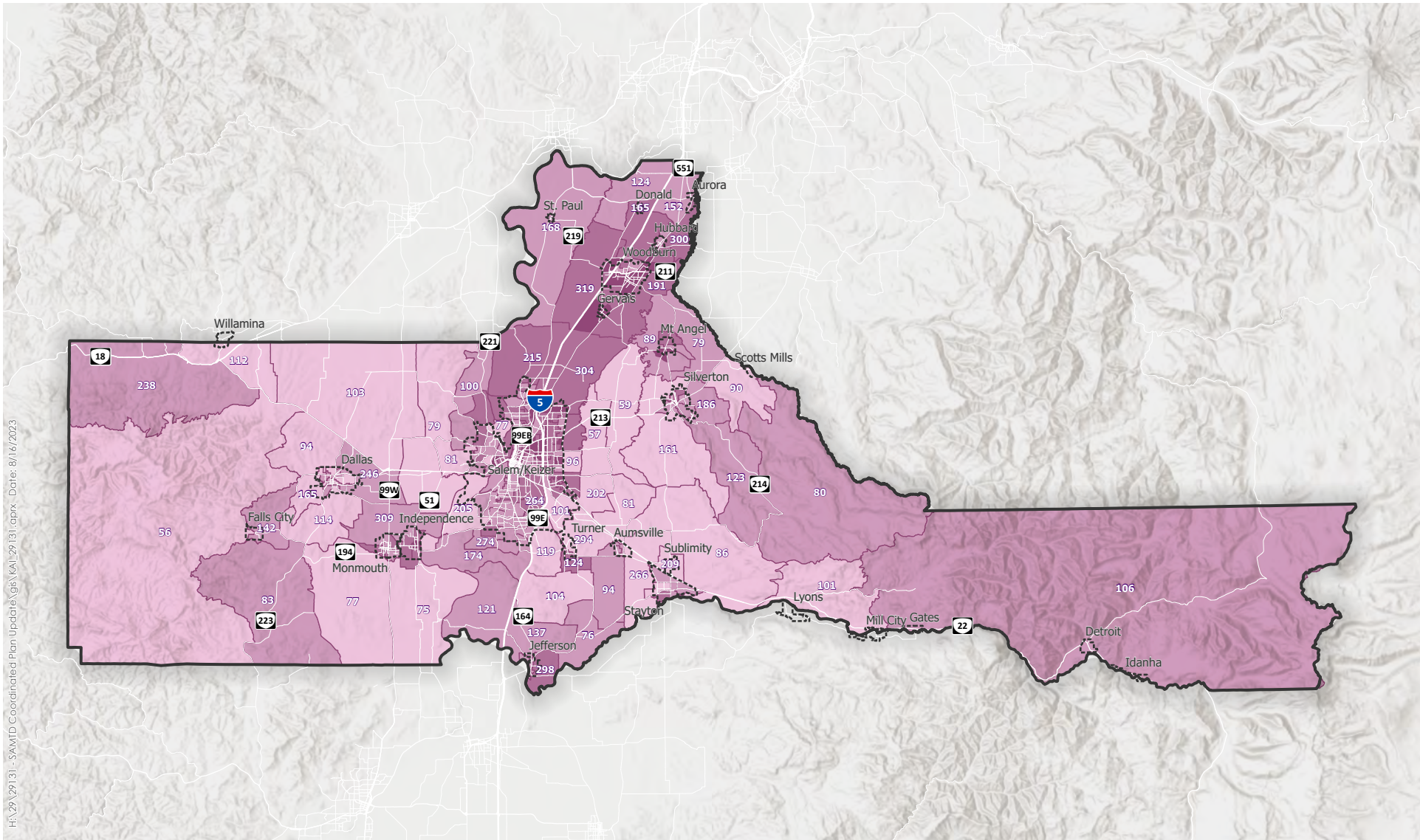
-  County Boundary
-  UGB



Figure 6

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



H:\29\29\31 - SAVITD Coordinated Plan Update\GIS\KAL\29\31.aprx Date: 8/16/2023

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

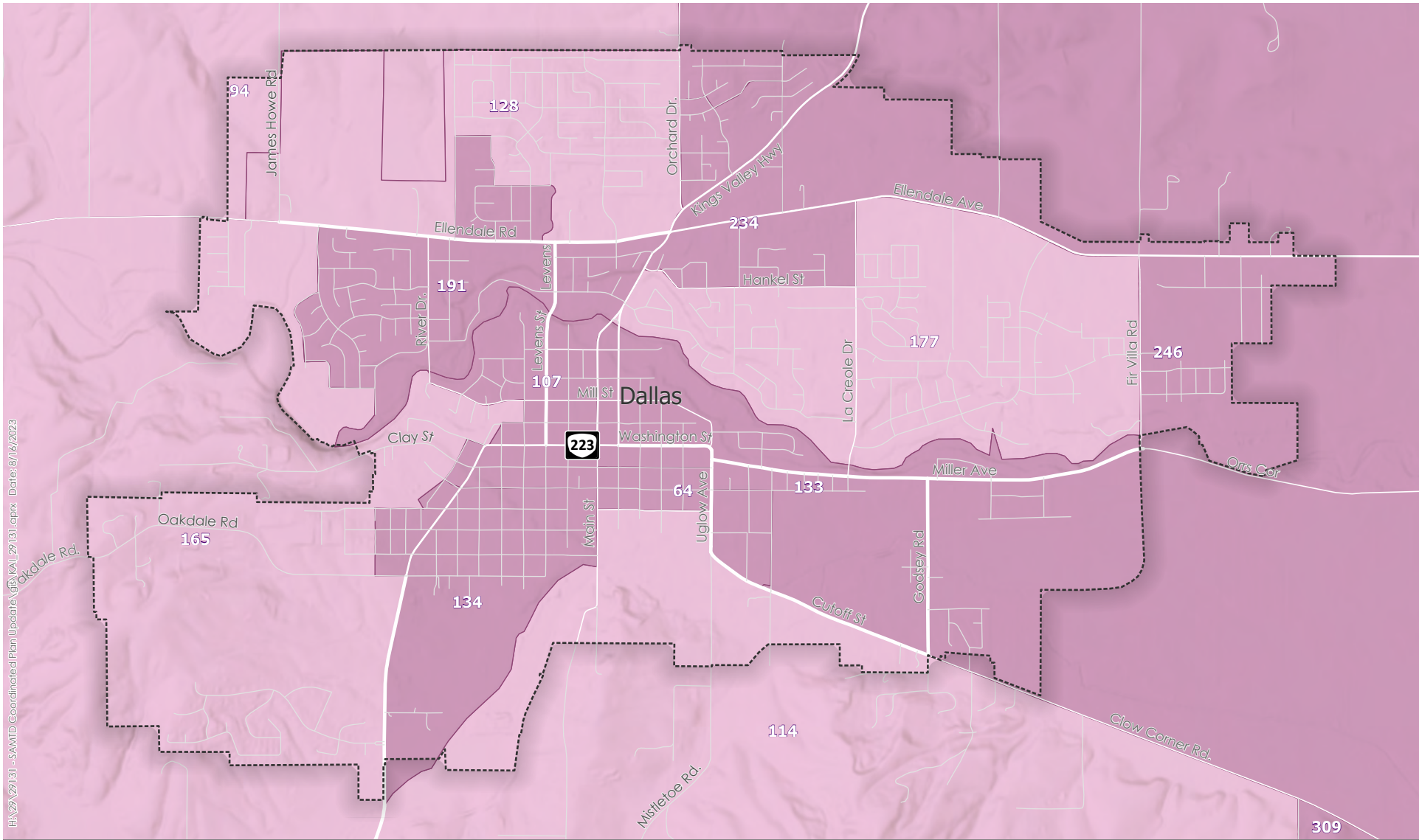
- 3% - 9%
- 10% - 12%
- 13% - 16%
- 17% - 24%

- County Boundary
- UGB



Figure 8

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



HL 223 (2/13) - SAMTD Coordinated Plan Update (GSA) (2/13) (aprx) Date: 8/16/2023

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

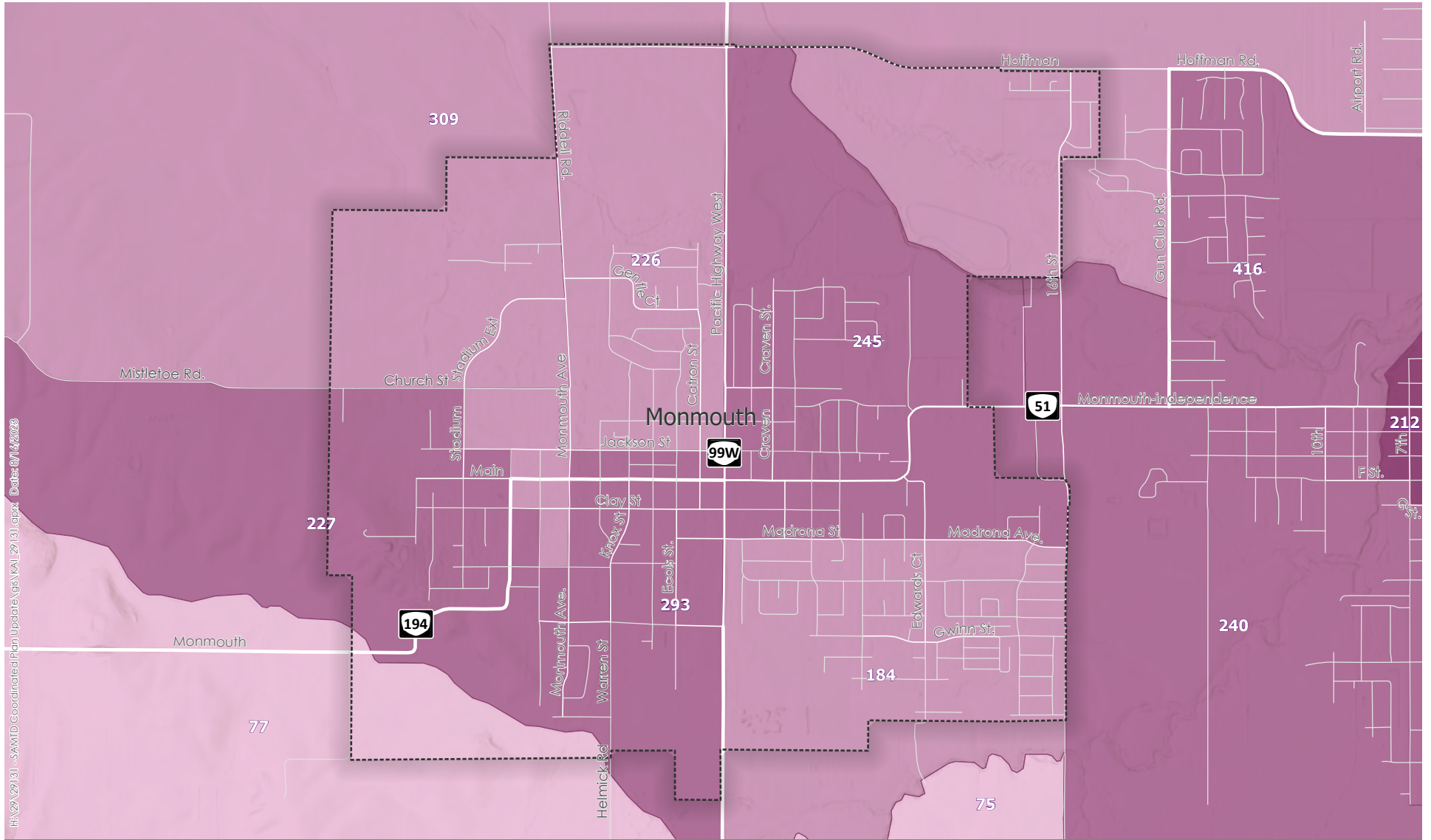
- 3% - 9%
- 10% - 12%
- 13% - 16%
- 17% - 24%

- County Boundary
- UGB



Figure 8

**Non-White Population  
Dallas, OR**



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

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

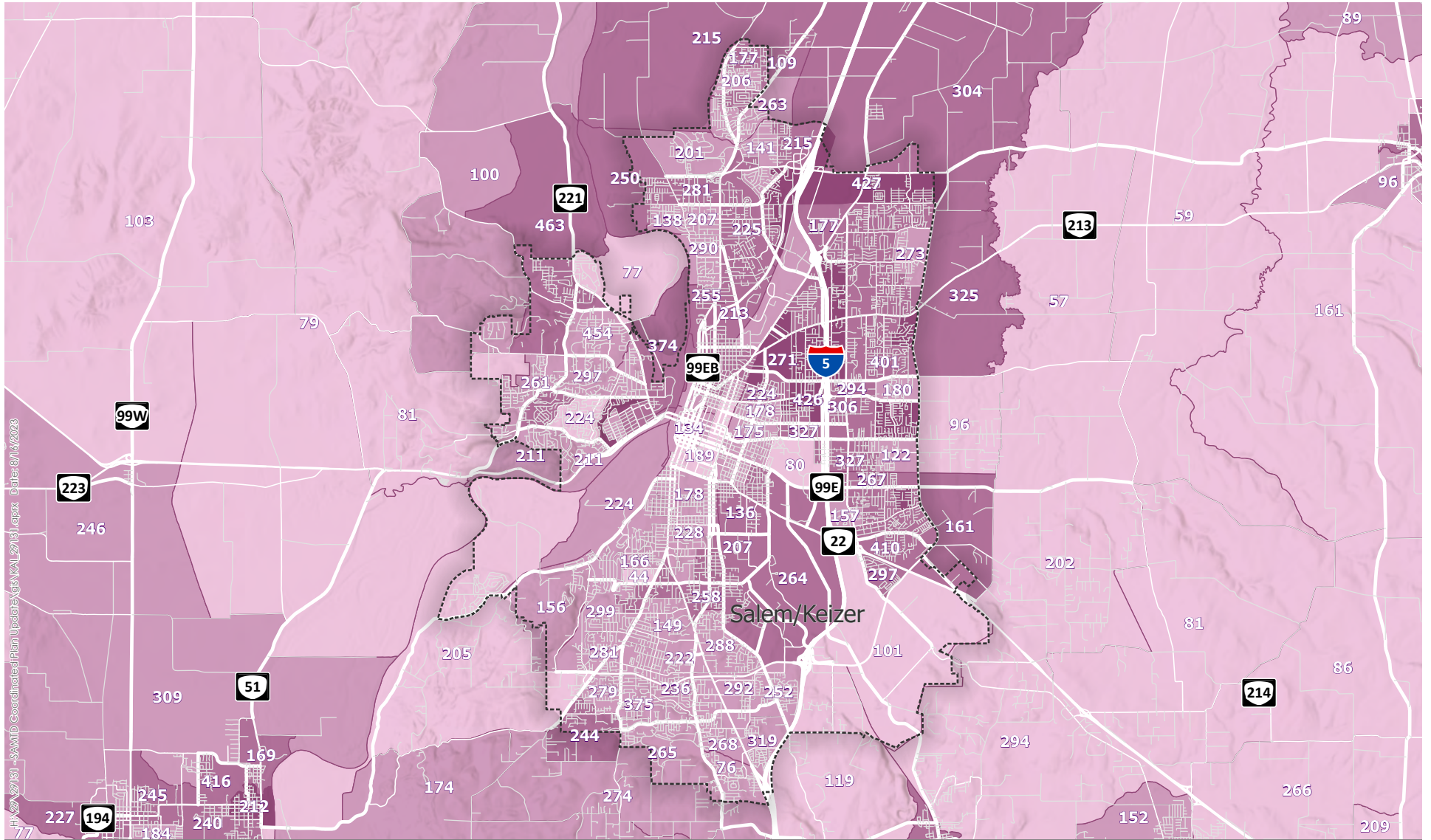
- County Boundary
- UGB



Figure 8

**Non-White Population  
Monmouth, OR**





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

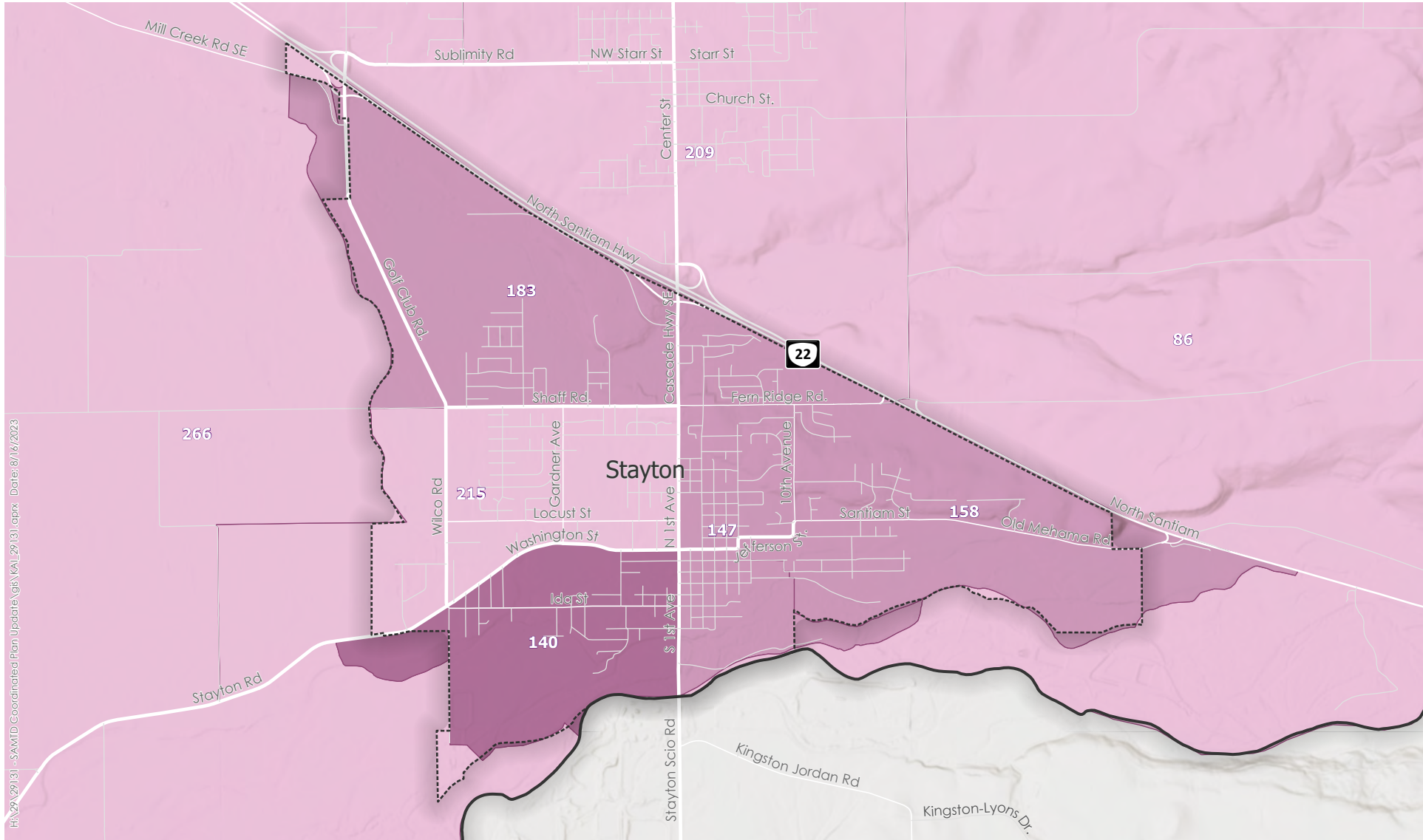
- 3% - 9%
- 10% - 12%
- 13% - 16%
- 17% - 24%

- County Boundary
- UGB







Figure 8

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



HA 22\29\31 - SAMTD Coordinated Plan Update\gis\KAL 29\31.aprx Date: 8/16/2023

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

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



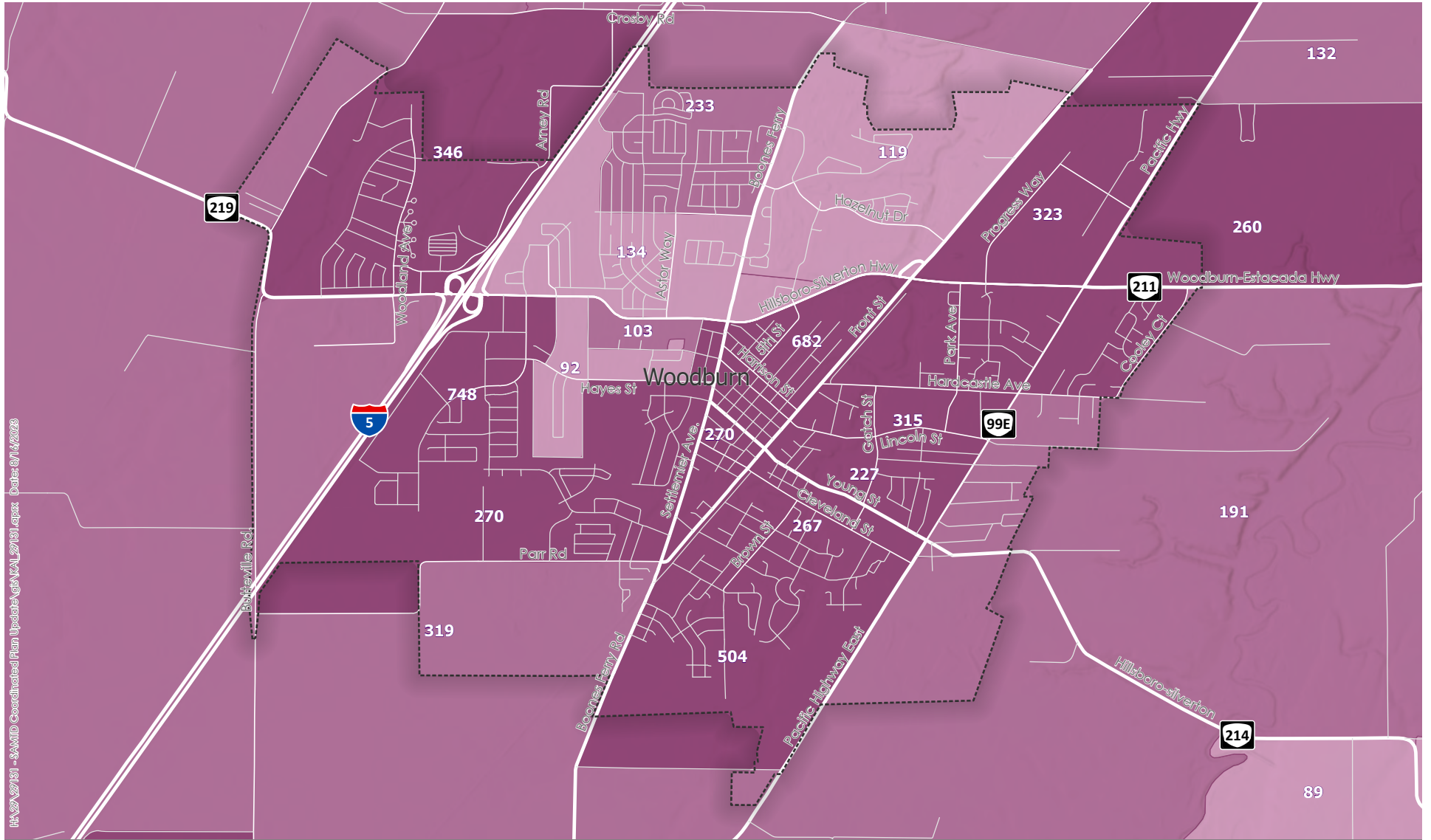
-  County Boundary
-  UGB



Figure 8

**Non-White Population  
Stayton, OR**



H:\2024\27131 - SAMID Coordinated Plan Update\GIS\Map\_27131.aprx Date: 07/12/2024

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

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

- County Boundary
- UGB



Figure 8

**Non-White Population  
Woodburn, OR**

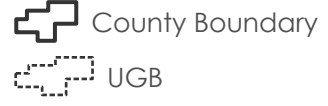
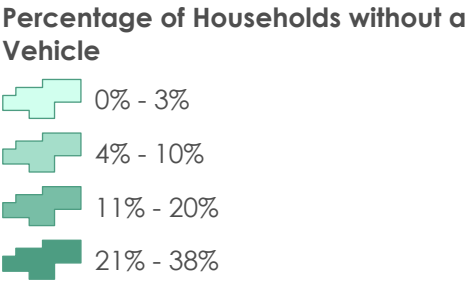
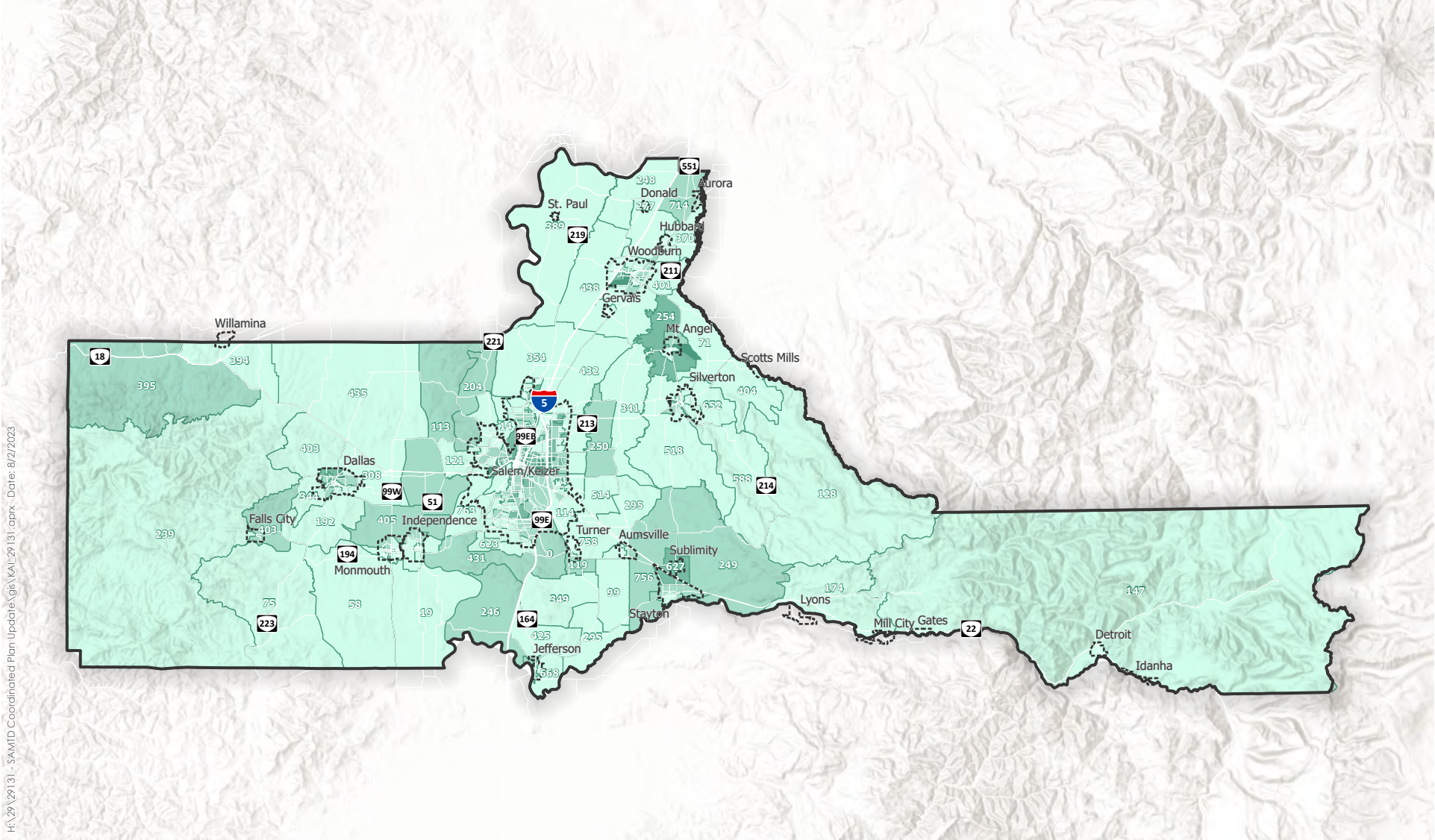
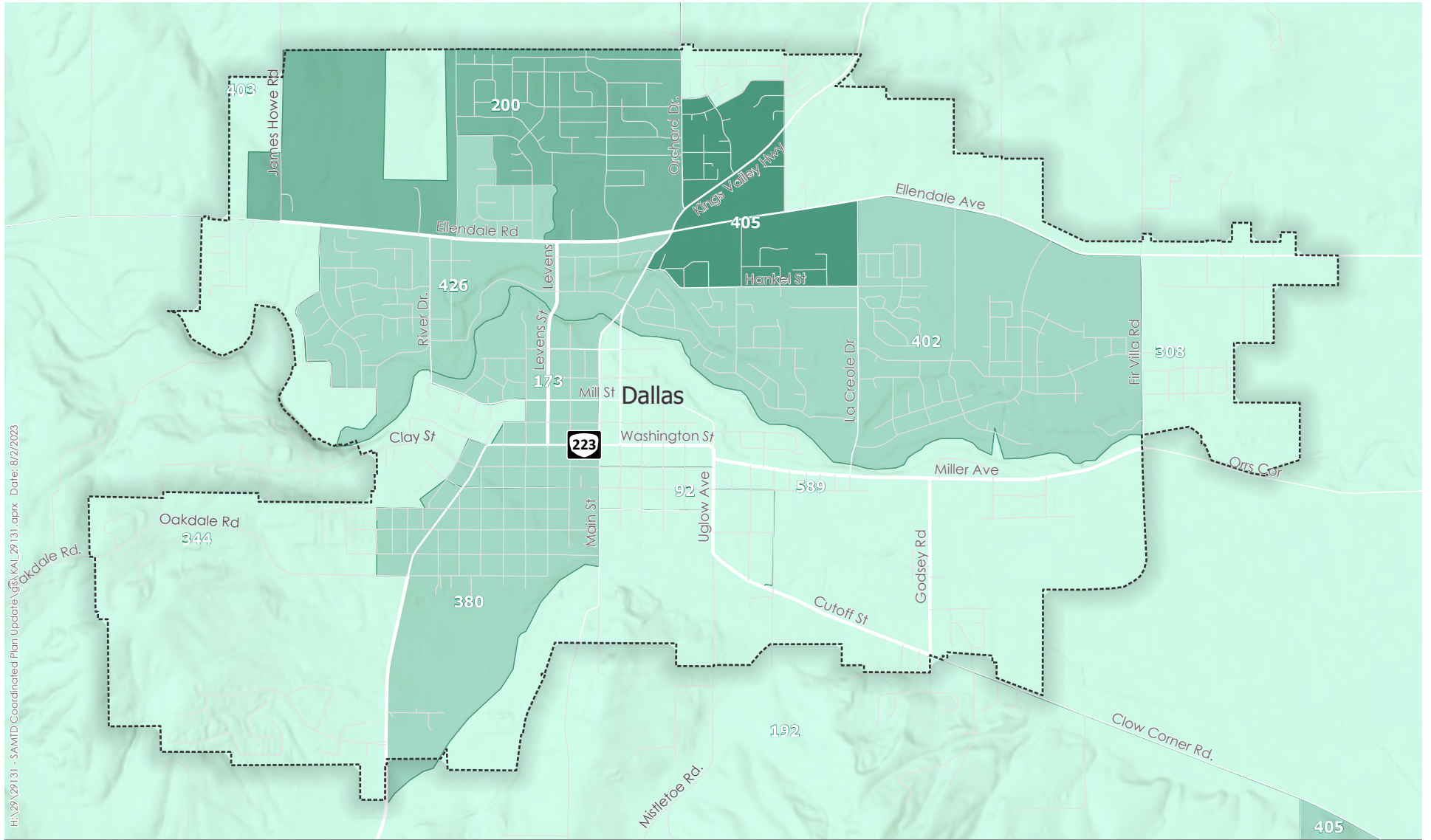


Figure 9

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



**Percentage of Households without a Vehicle**

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

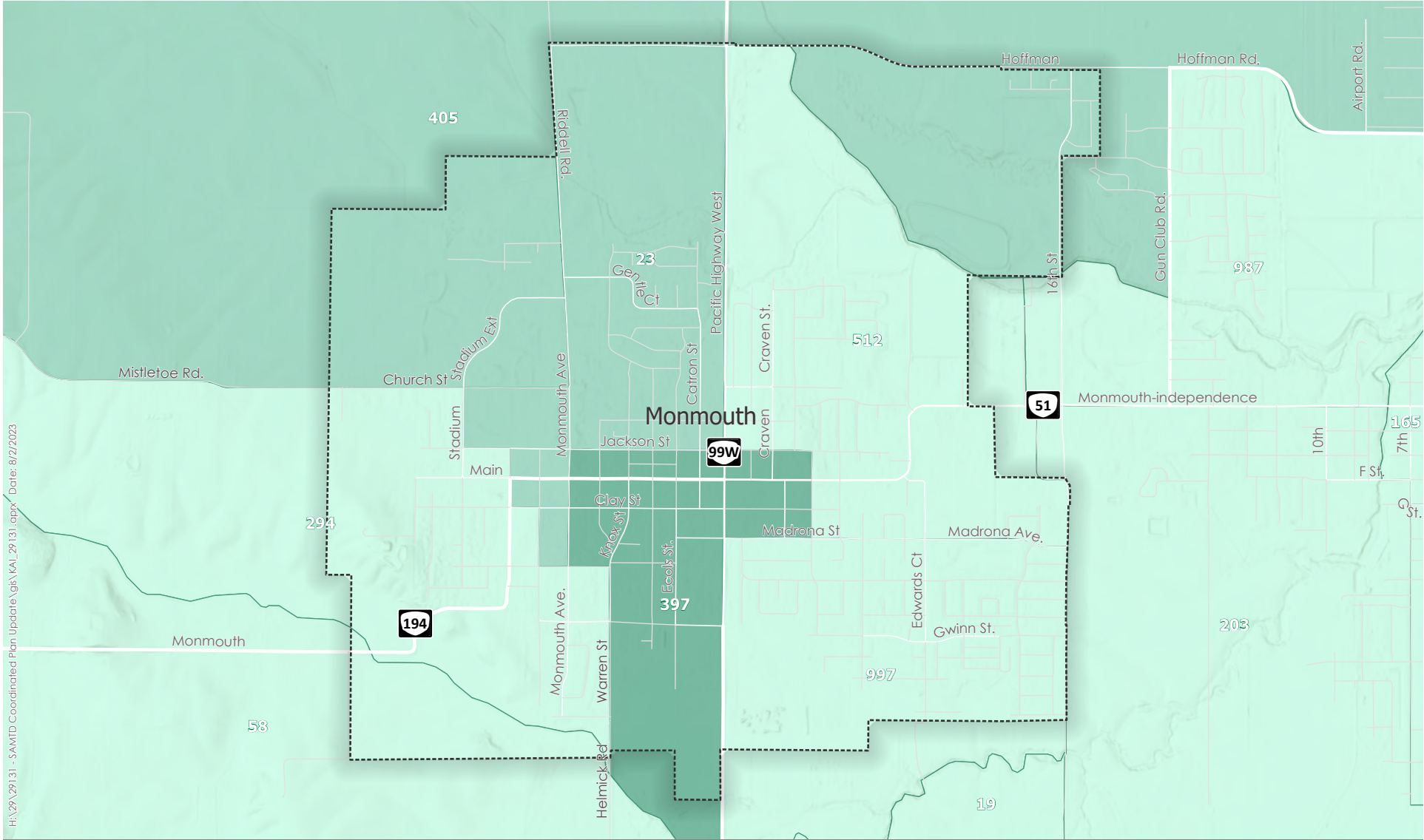
- County Boundary
- UGB

0 0.9 Miles



Figure 9

**Zero Vehicle Households  
Dallas, OR**



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

**Percentage of Households without a Vehicle**

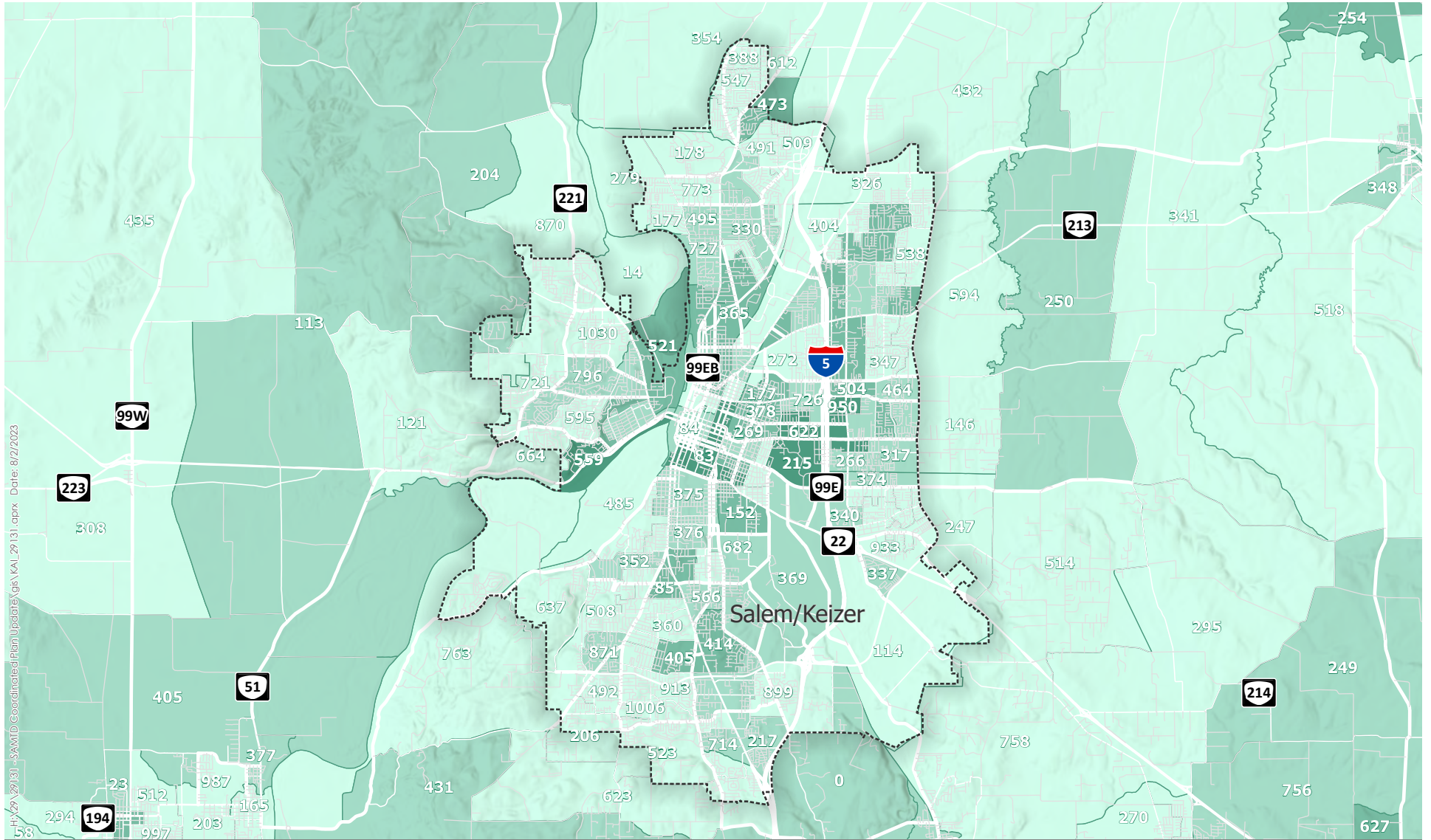
- 0% - 3%
- 4% - 10%
- 11% - 20%
- 21% - 38%

- County Boundary
- UGB

0 0.7 Miles

Figure 9

**Zero Vehicle Households  
Monmouth, OR**



**Percentage of Households without a Vehicle**

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

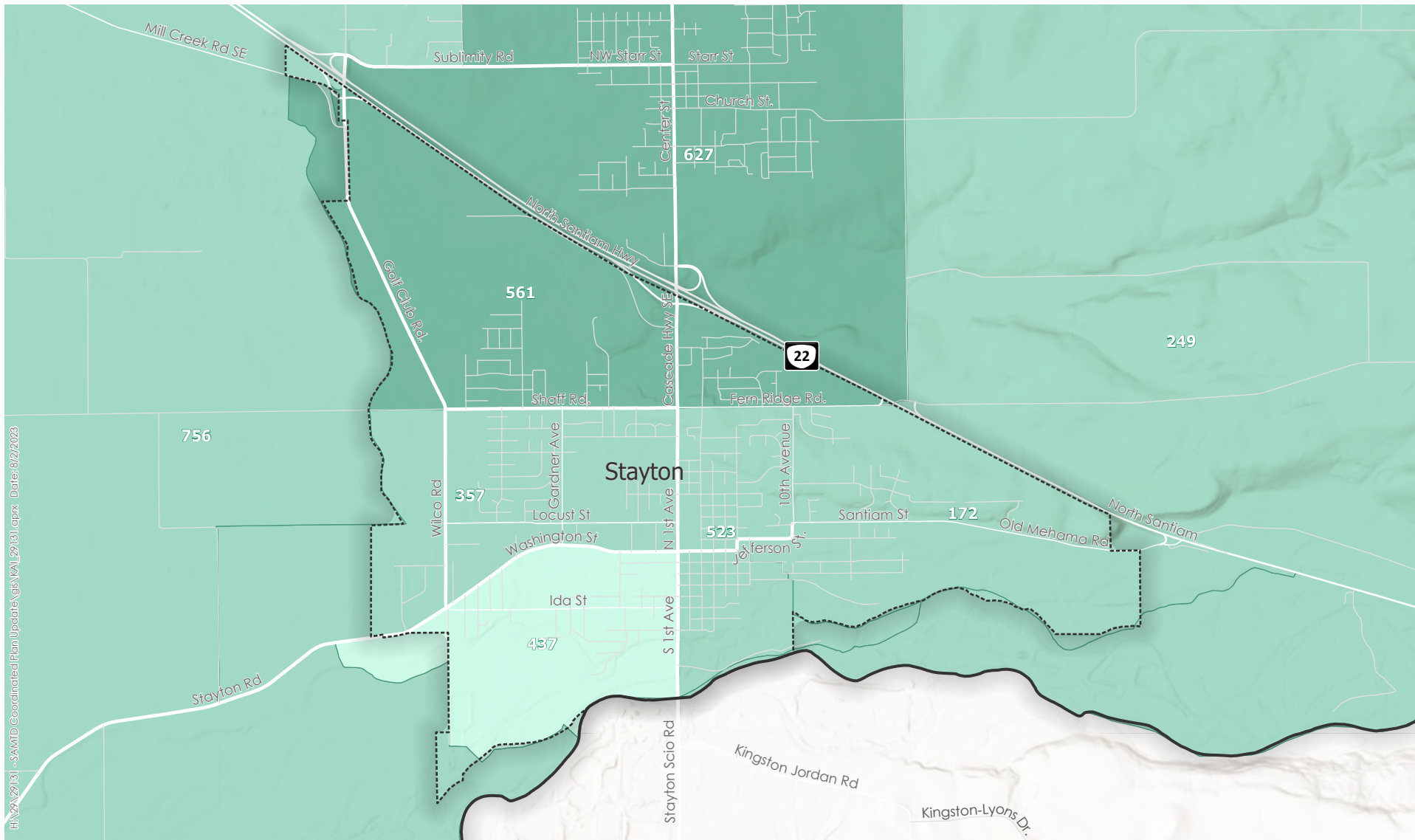
- County Boundary
- UGB

0 4.5 Miles



Figure 9

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



**Percentage of Households without a Vehicle**

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

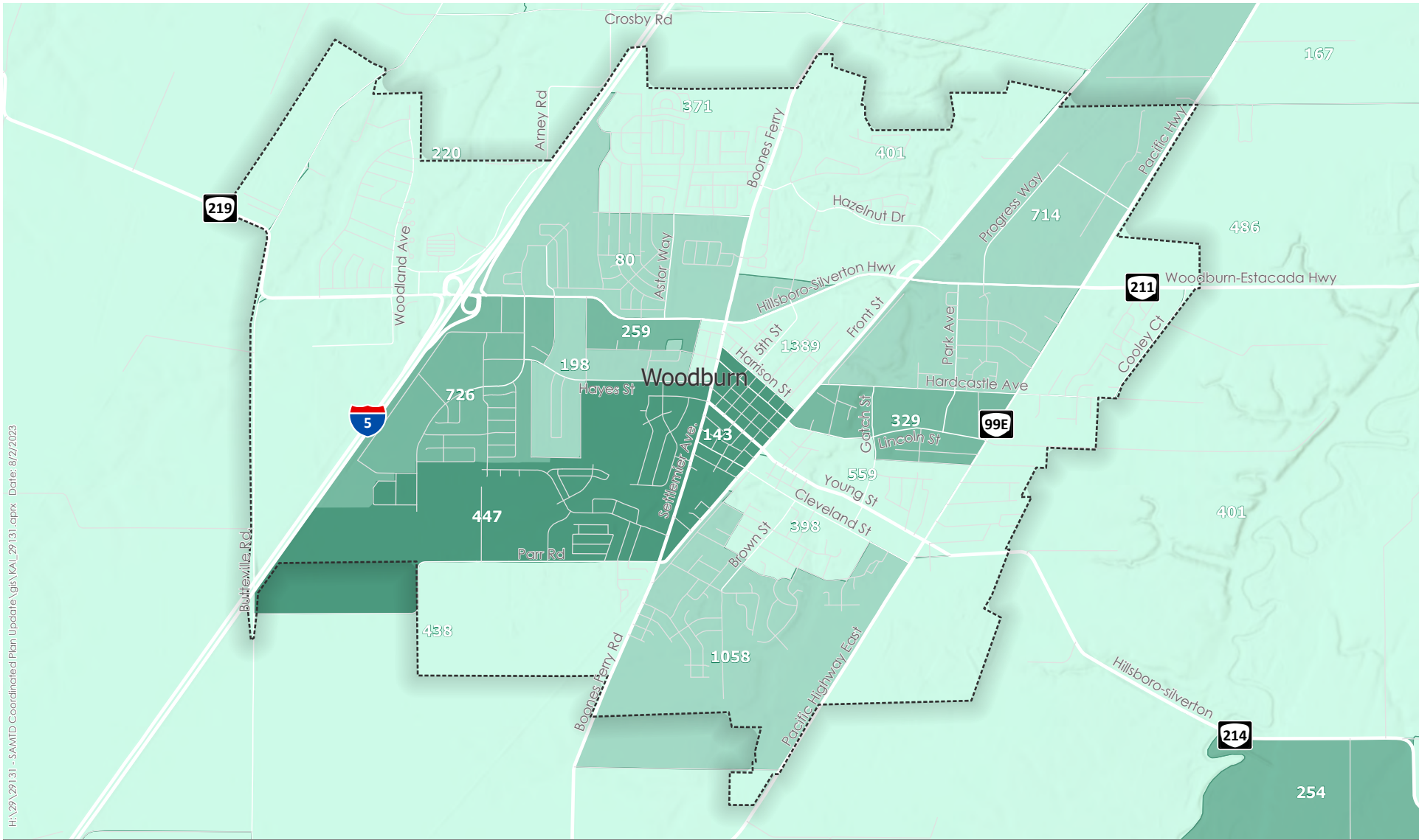
- County Boundary
- UGB



Figure 9

**Zero Vehicle Households  
Stayton, OR**





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**Percentage of Households without a Vehicle**

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

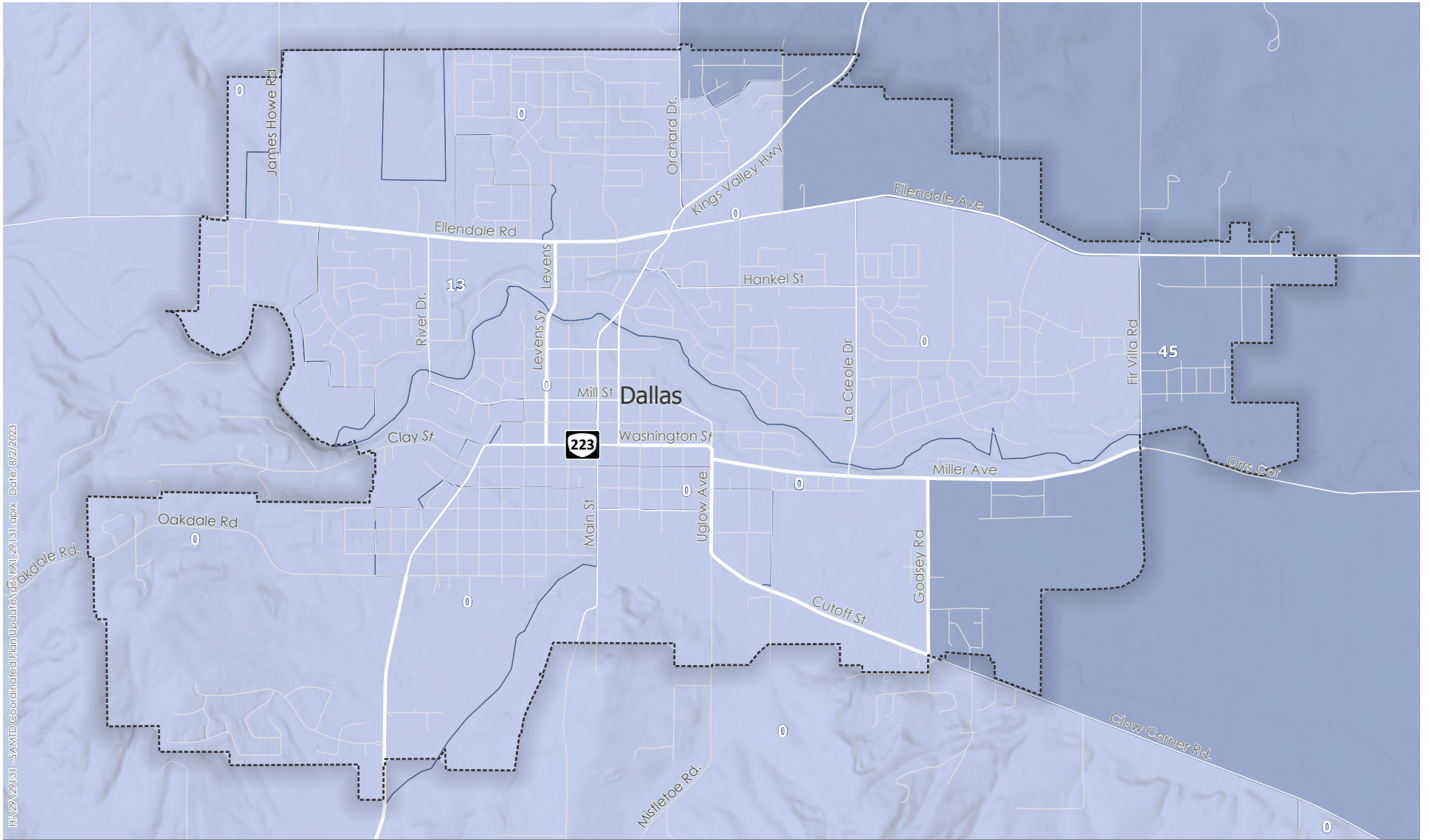
- County Boundary
- UGB



Figure 9

**Zero Vehicle Households  
Woodburn, OR**





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

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

- County Boundary
- UGB

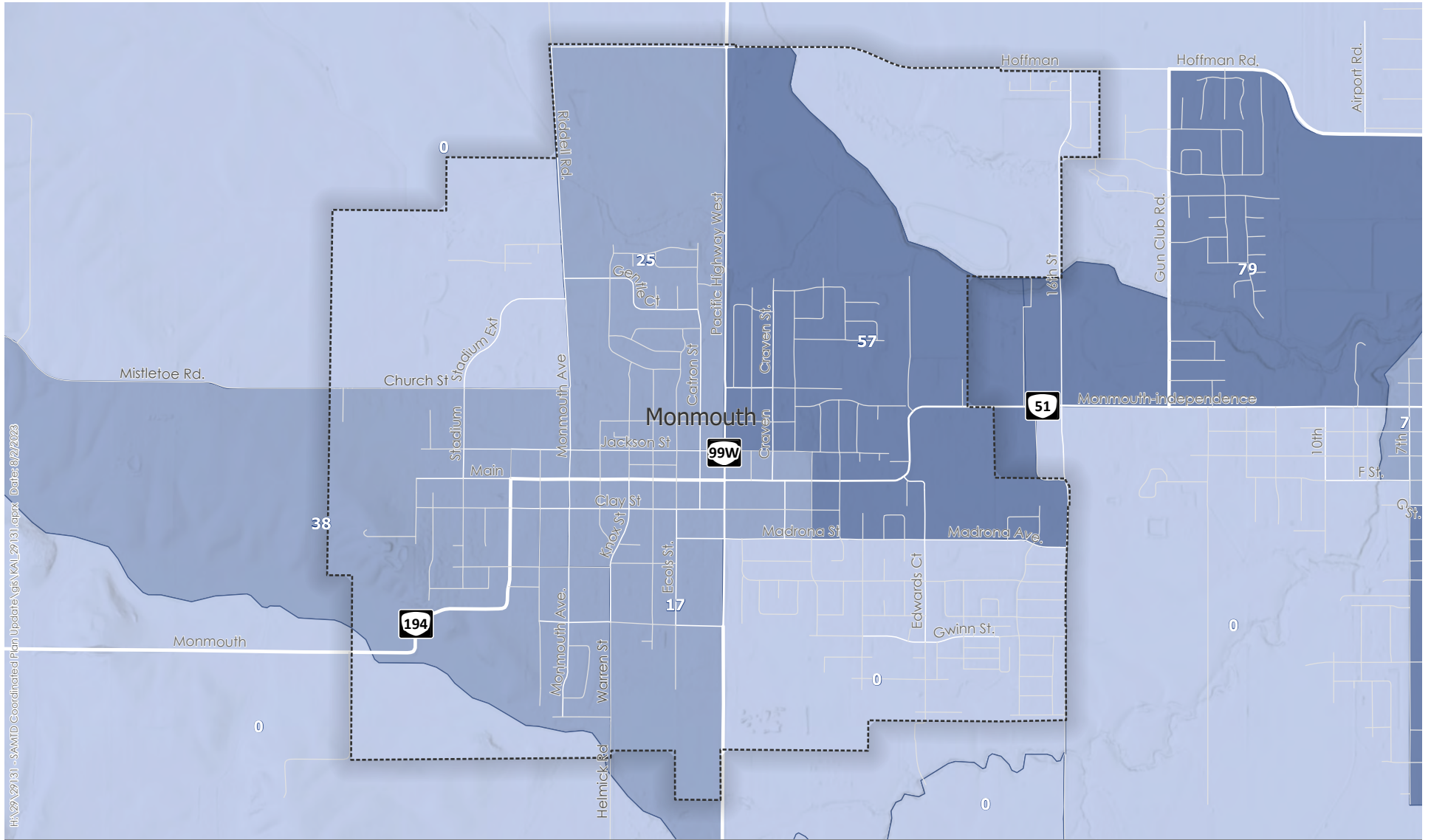
0 0.9 Miles



Figure 10

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

H:\23\29131 - SAMTD Coordinated Plan Update\GIS\Map\_29131.aprx Date: 8/2/2023



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

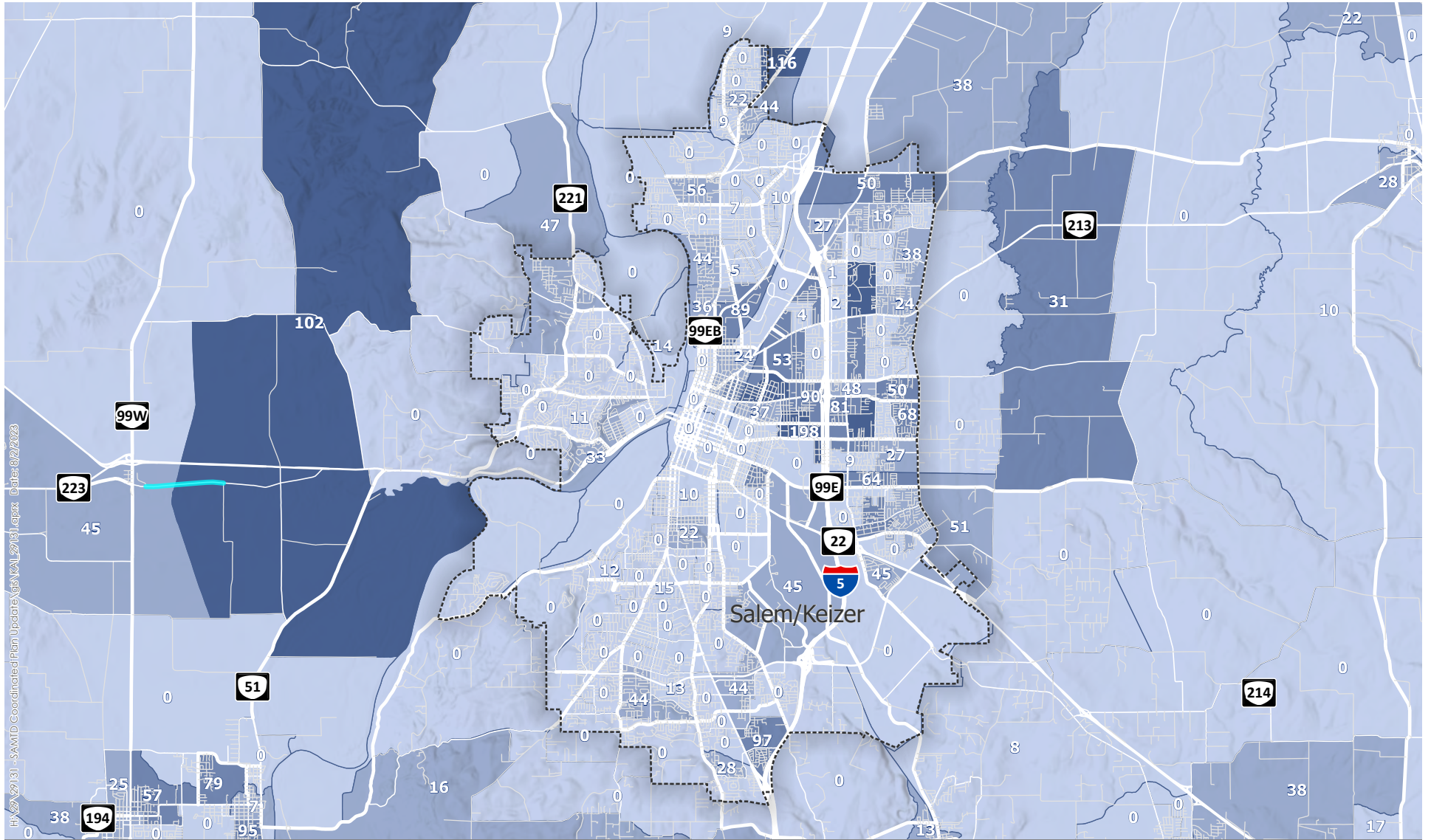
- 0% - 2%
- 3% - 7%
- 8% - 19%
- 20% - 54%

- County Boundary
- UGB







Figure 10

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



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

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



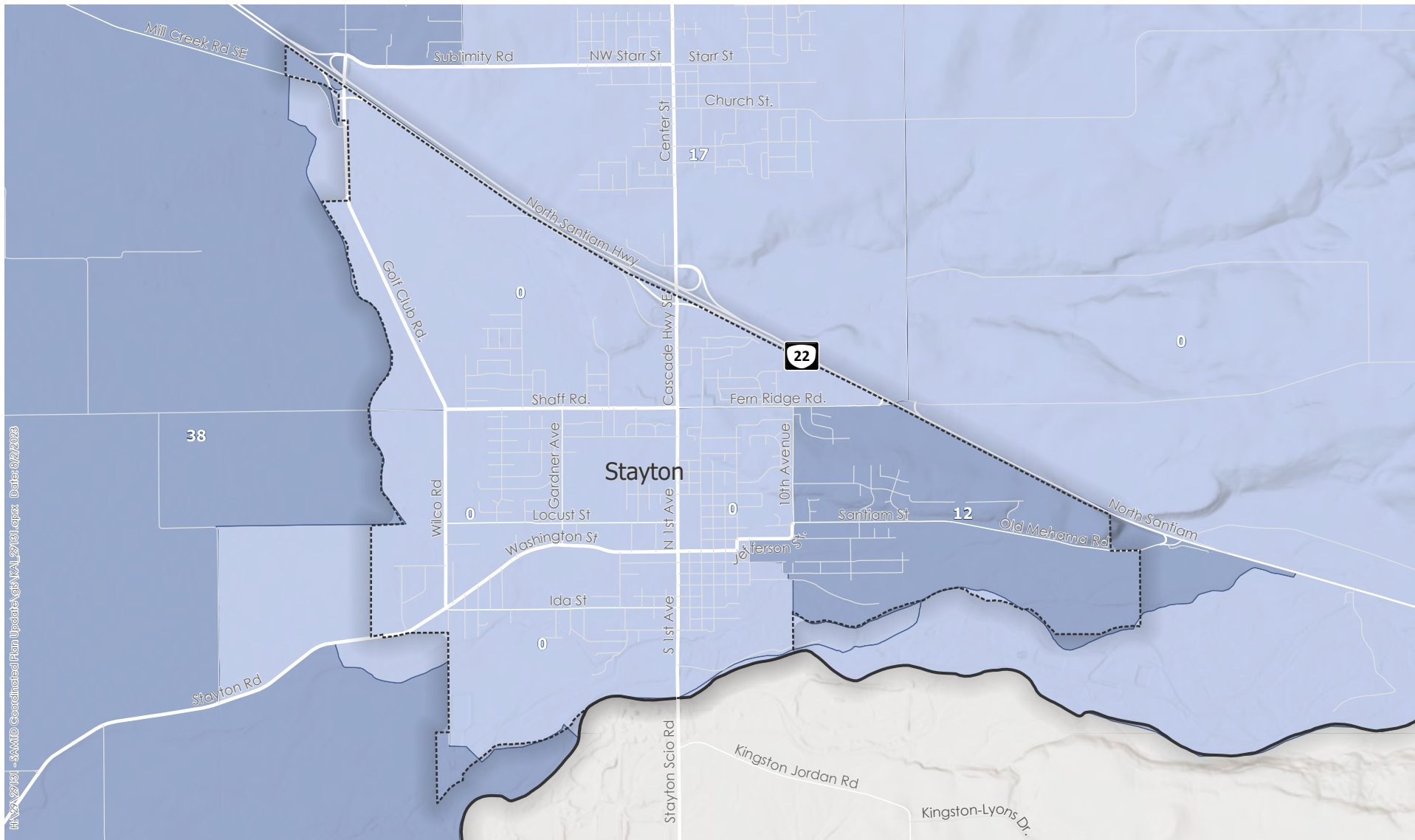
-  County Boundary
-  UGB



Figure 10

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



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

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

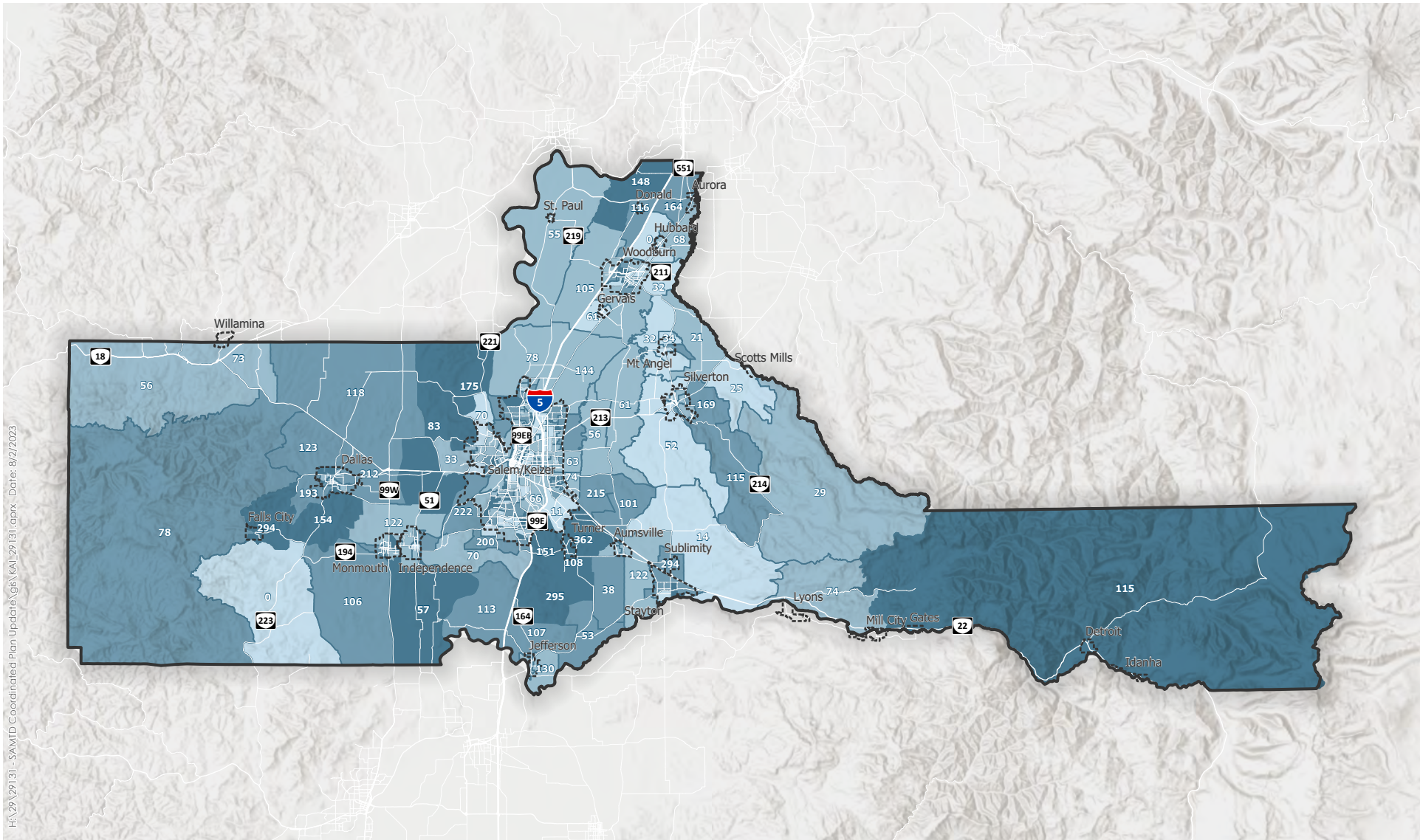
- County Boundary
- UGB



Figure 10

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





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

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

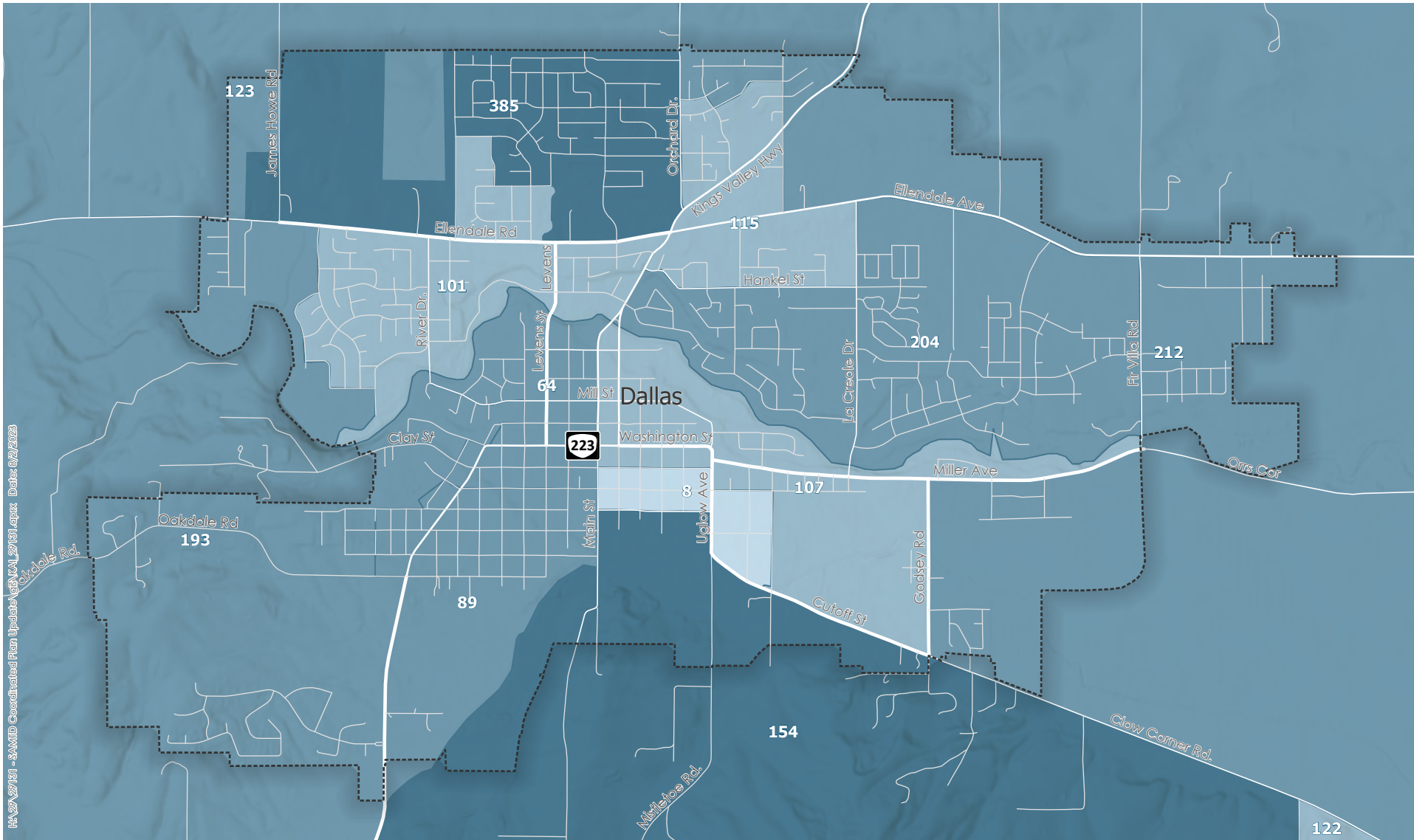
- County Boundary
- UGB



Figure 11

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





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

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

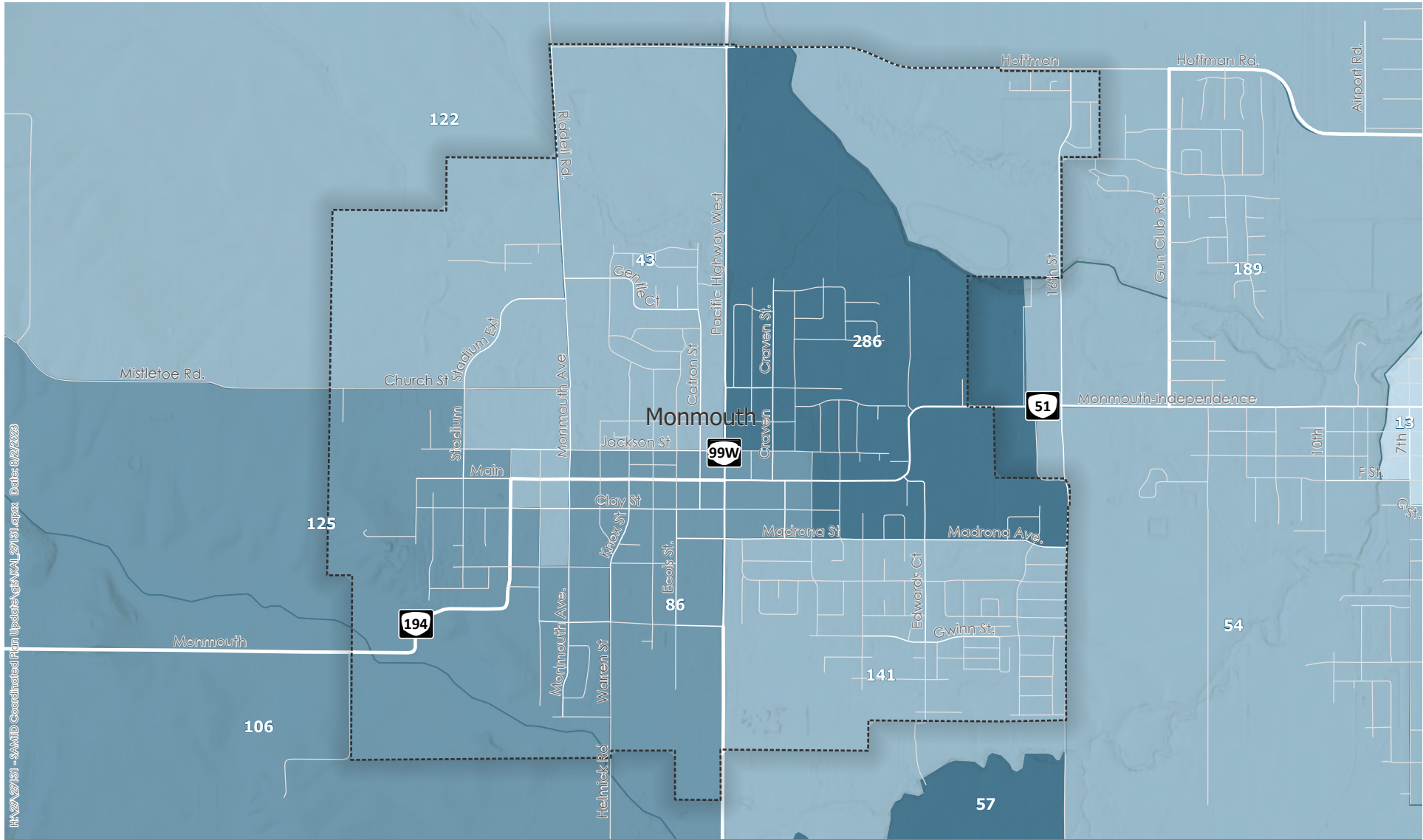
- County Boundary
- UGB

0 0.9 Miles



Figure 11

**Veteran Population  
Dallas, OR**



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

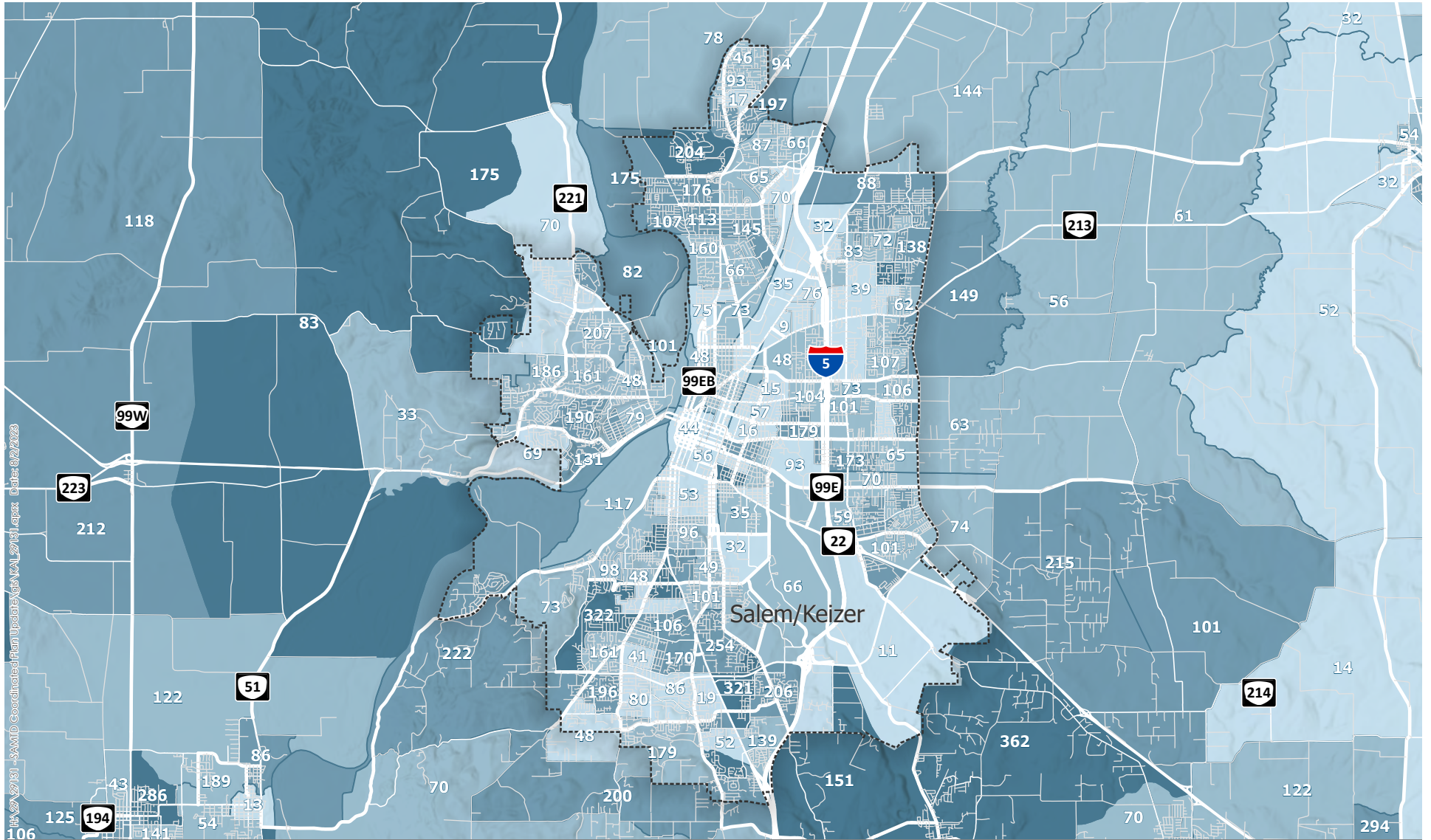
- 0% - 3%
- 4% - 6%
- 7% - 10%
- 11% - 16%

- County Boundary
- UGB







Figure 11

**Veteran Population  
Monmouth, OR**



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

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



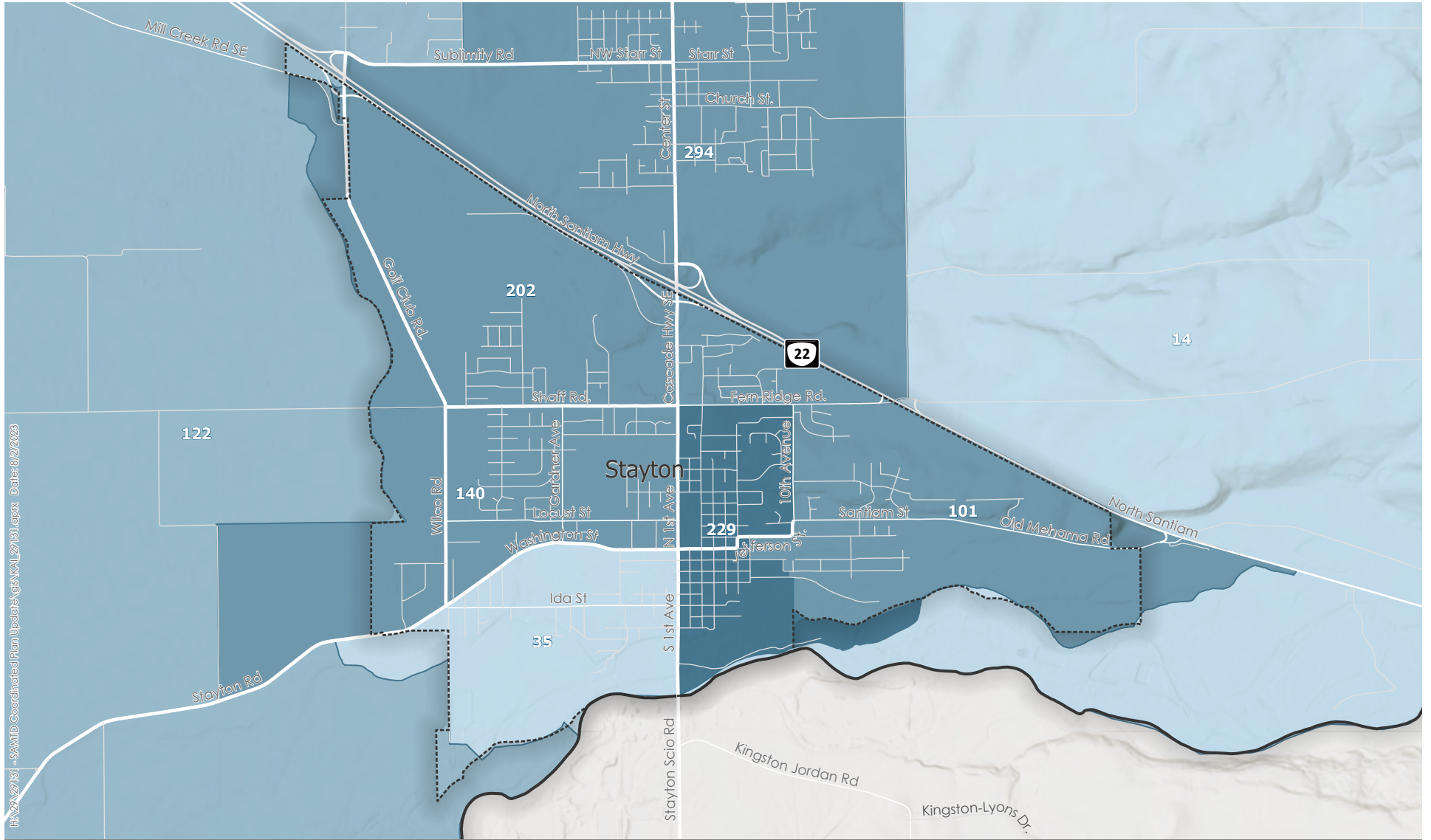
-  County Boundary
-  UGB



Figure 11

**Veteran Population  
Salem/Keizer, OR**



H:\24\2931 - SAMID Coordinated Plan Update\GIS\Map\_2931.aprx Date: 8/2/2023

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

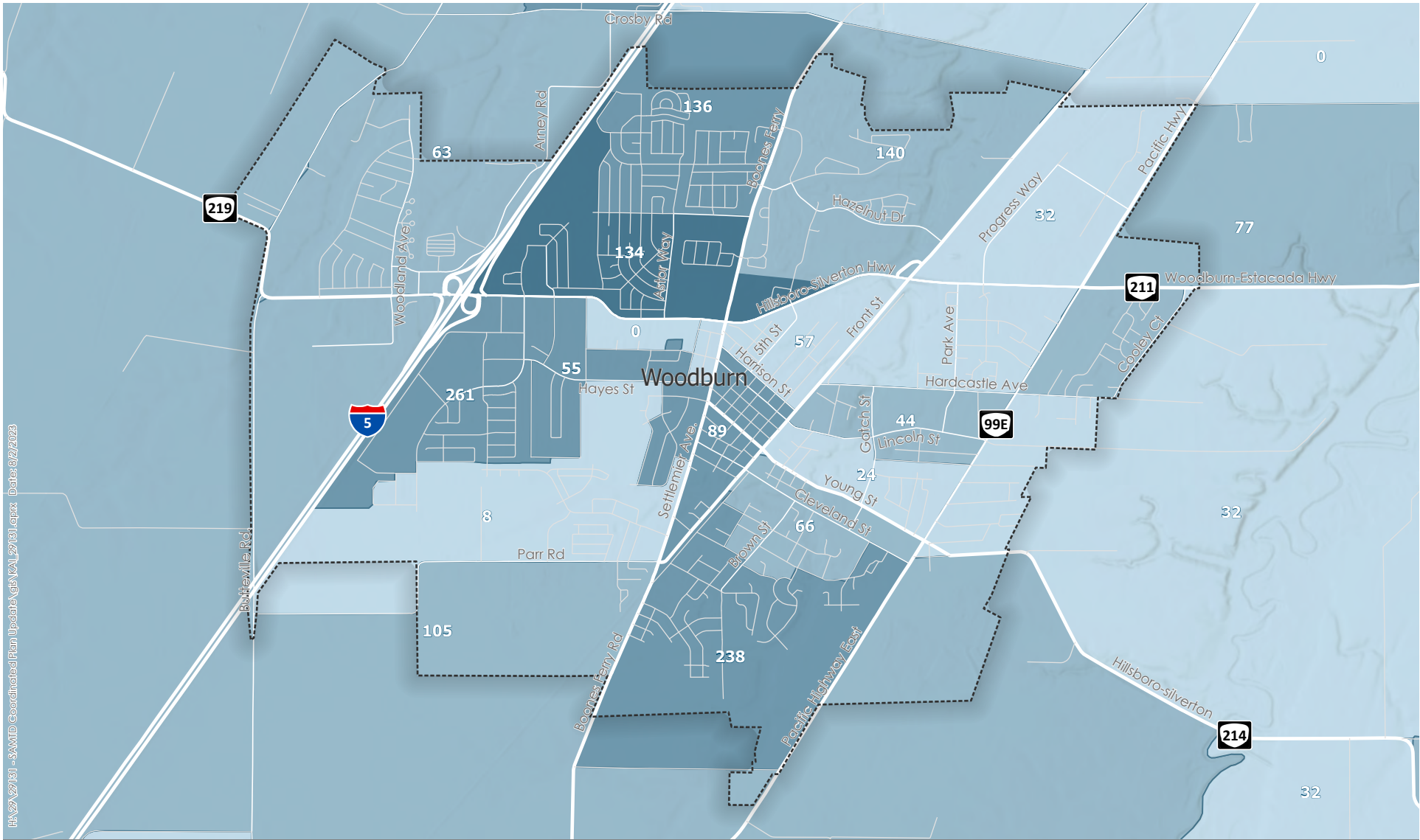
- 0% - 3%
- 4% - 6%
- 7% - 10%
- 11% - 16%

- County Boundary
- UGB



Figure 11

**Veteran Population  
Stayton, OR**



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

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

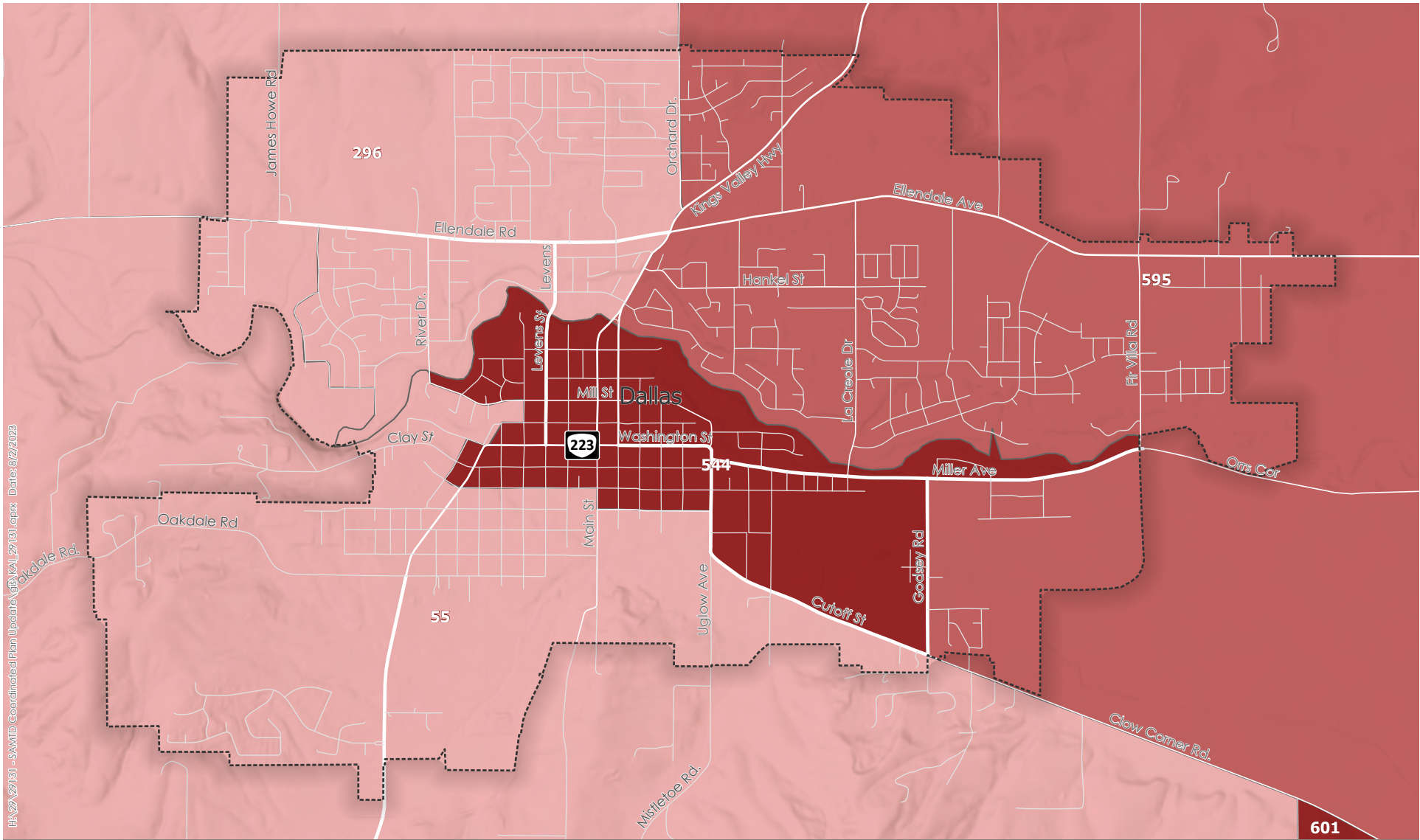
- County Boundary
- UGB



Figure 11

**Veteran Population  
Woodburn, OR**





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

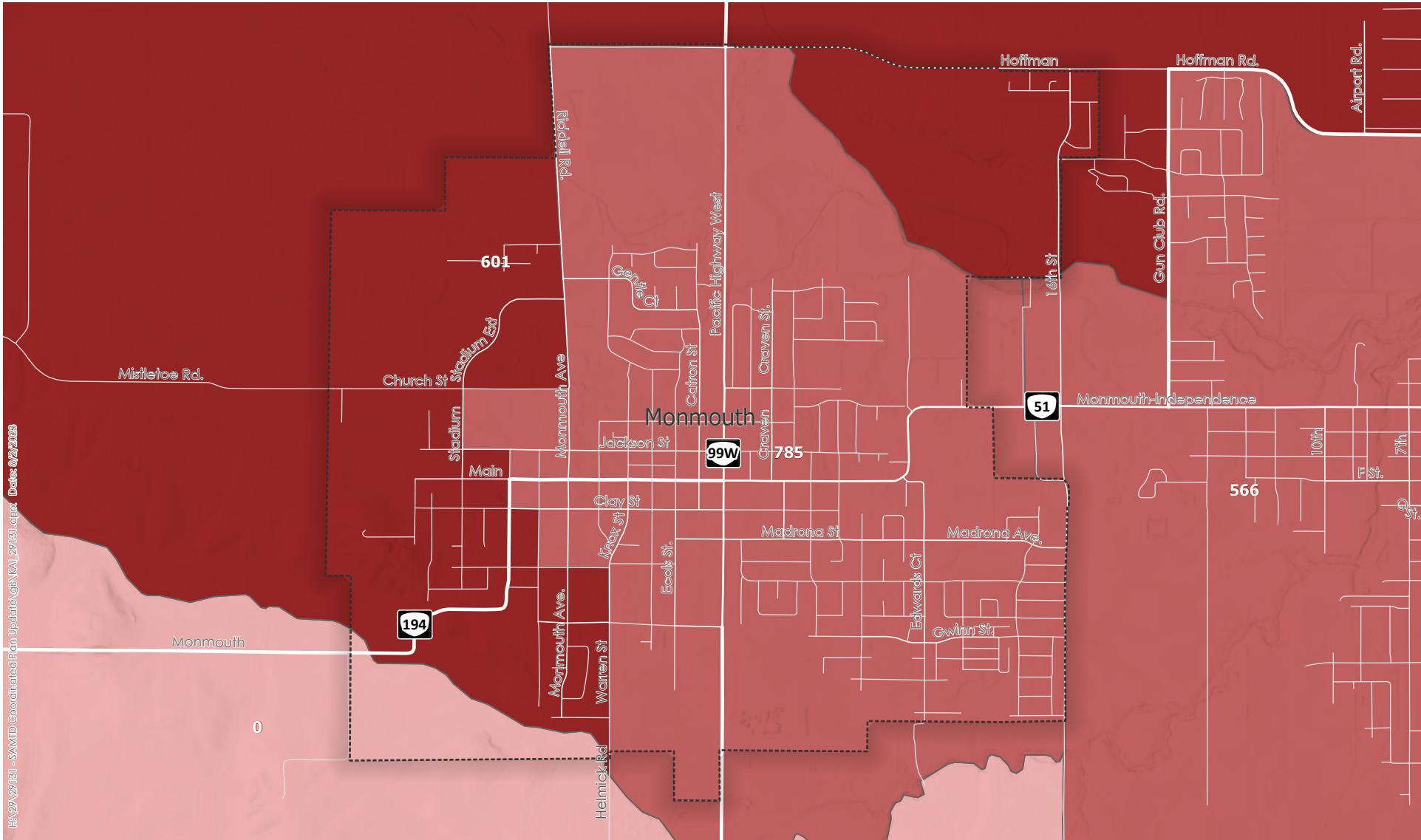
- 0% - 13%
- 14% - 31%
- 32% - 55%
- 56% - 84%

- County Boundary
- UGB



Figure 12

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



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

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

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

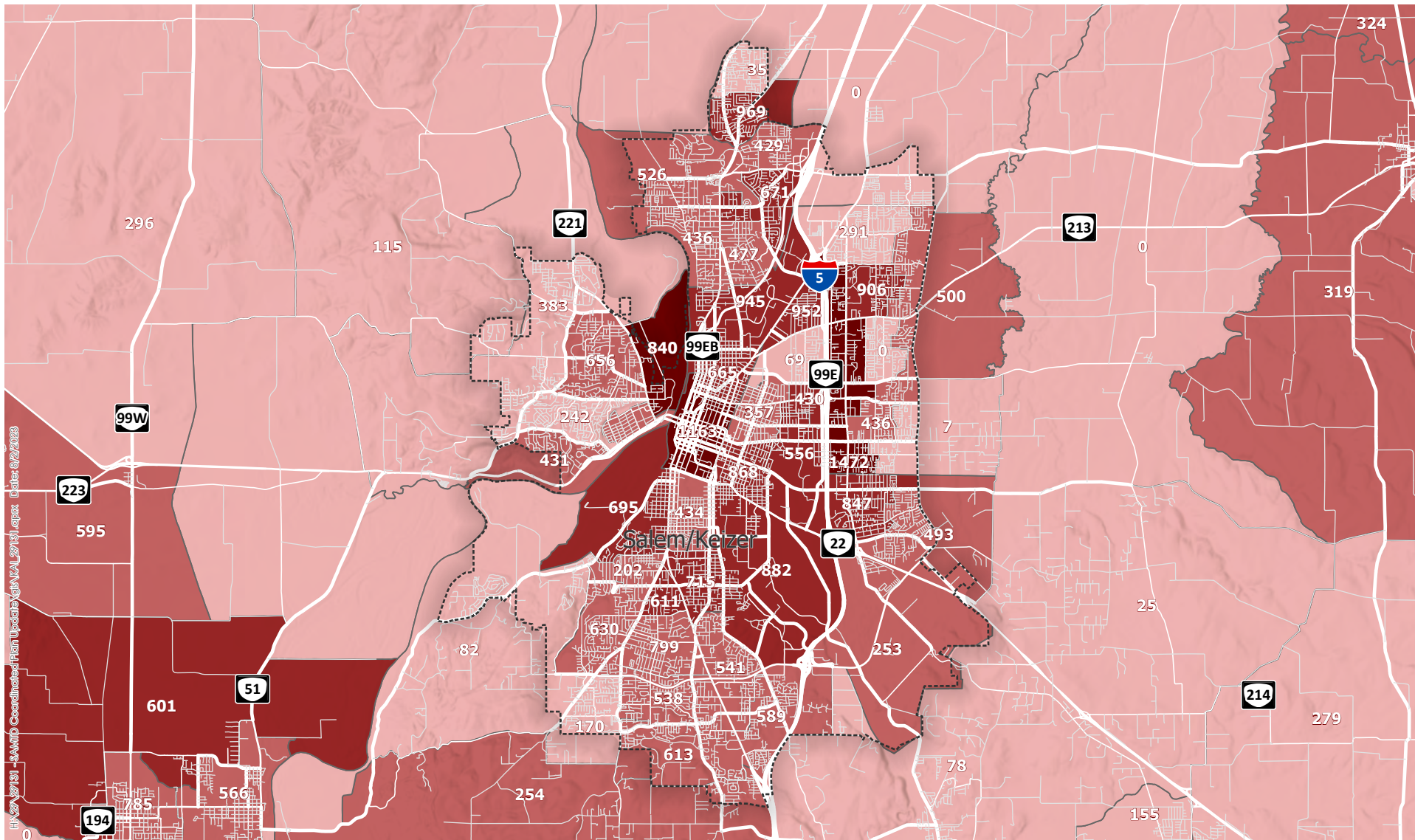
- County Boundary
- UGB



Figure 12

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





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

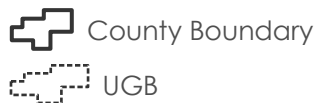
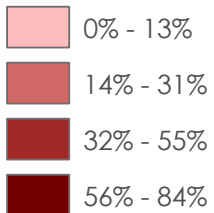
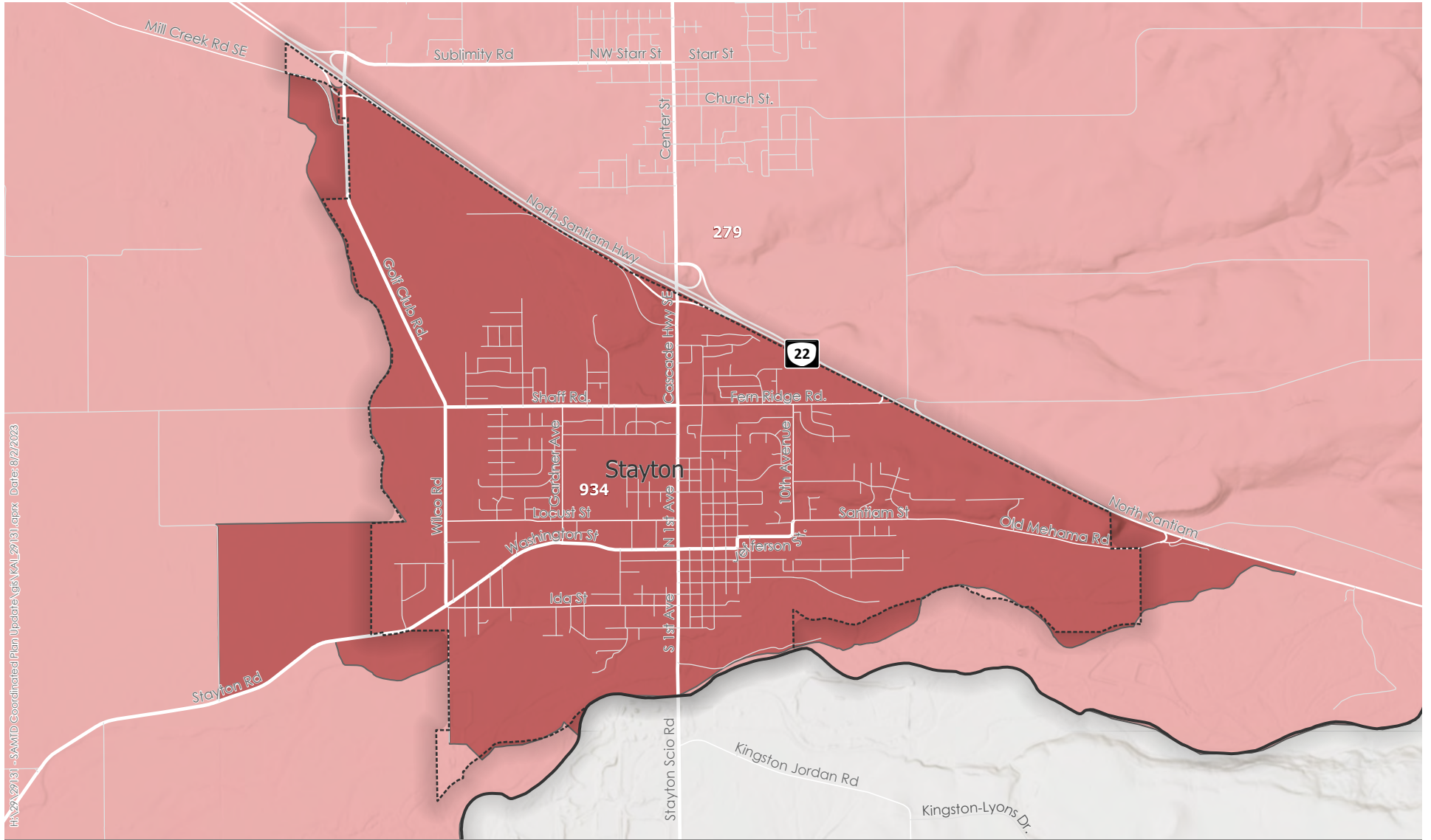


Figure 12

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



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

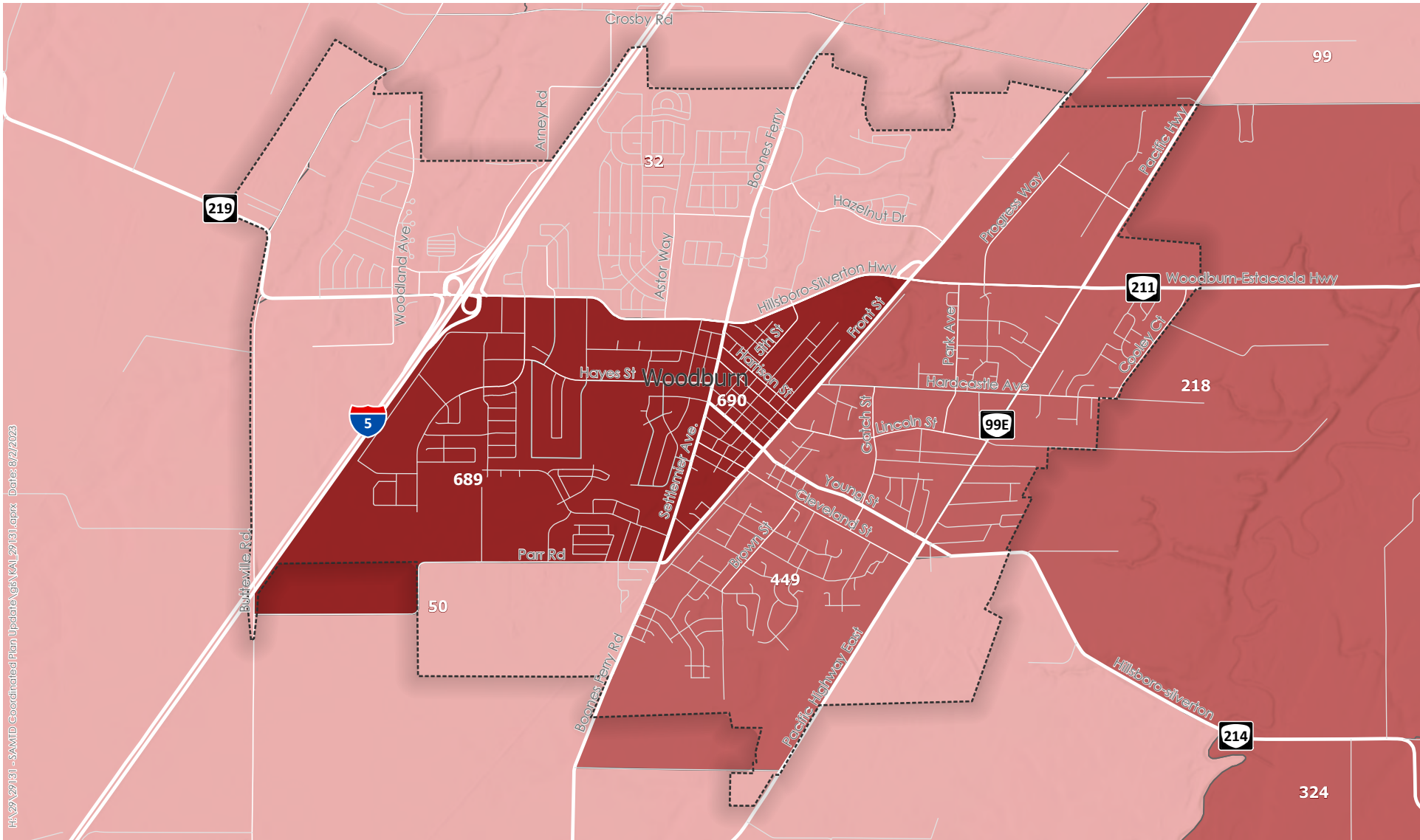
- 0% - 13%
- 14% - 31%
- 32% - 55%
- 56% - 84%

- County Boundary
- UGB



Figure 12

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



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

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

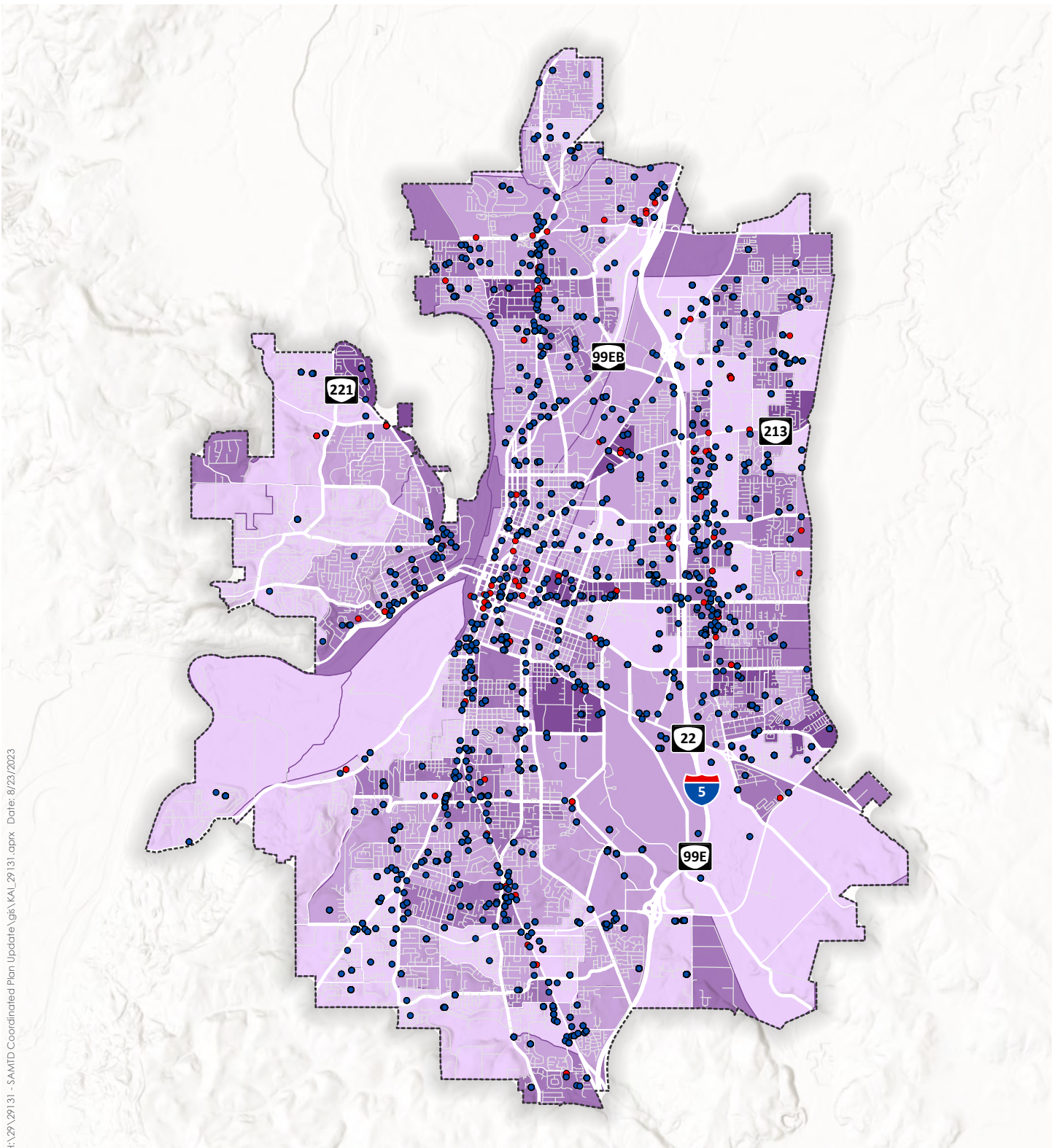
- County Boundary
- UGB







Figure 12

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

H:\29\29131 - SAMTD Coordinated Plan Update\gis\KAL\_29131.aprx Date: 8/23/2023



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

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




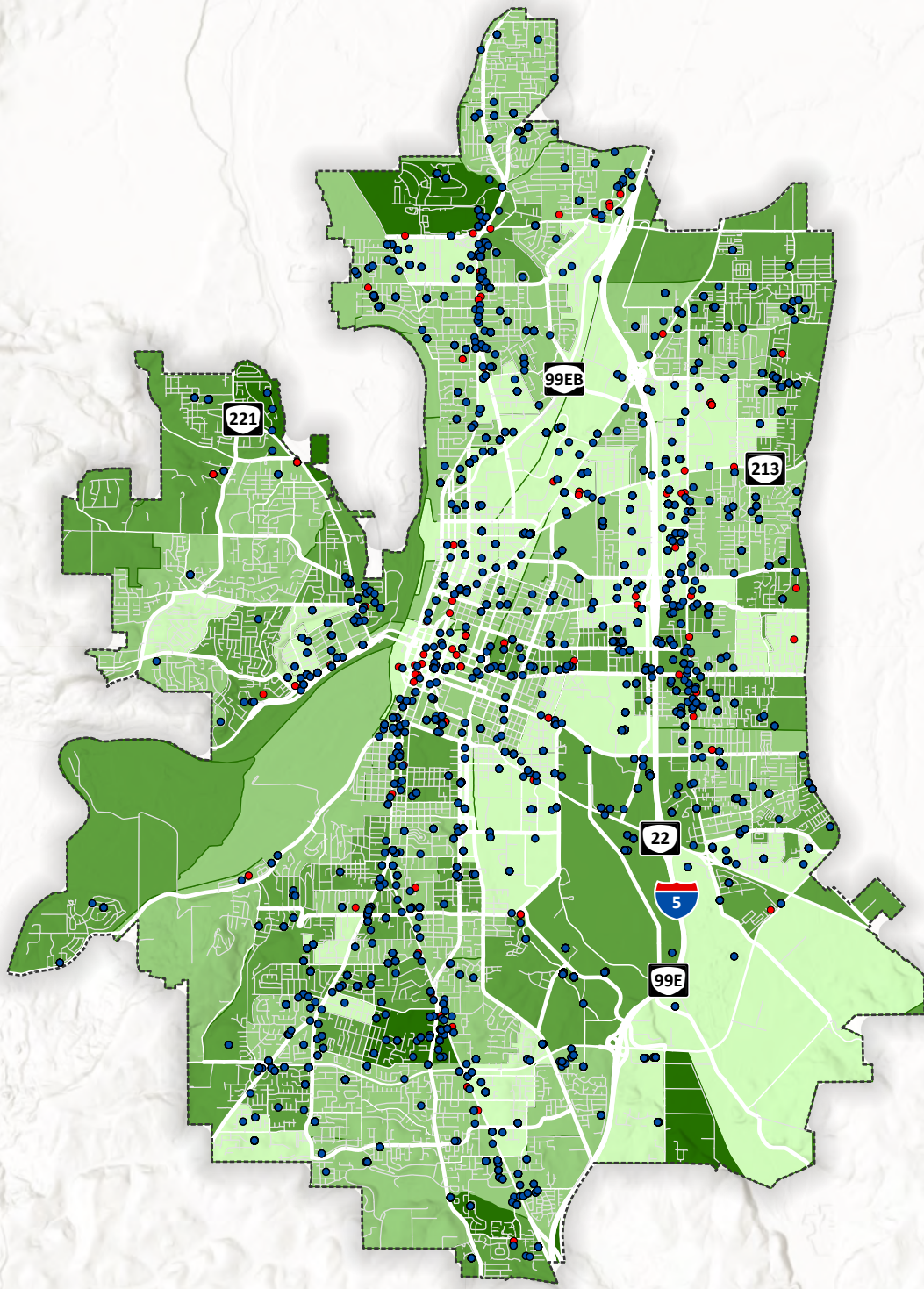
-  Origins
-  Destinations
-  Salem/ Keizer UGB



Figure 13

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

H:\29\29131 - SAMTD Coordinated Plan Update\gis\KAL\_29131.aprx Date: 8/23/2023



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

- 1% - 10%
- 11% - 19%
- 20% - 29%
- 30% - 76%

- Origins
- Destinations
- Salem/ Keizer UGB



**Figure 14**  
**Origins and Destinations for Cherriots LIFT Customers and Senior Population (Age 65 and Older) Salem/ Keizer, OR**

## APPENDIX D: MEMO #3 – TRANSIT PROVIDERS

# Technical Memorandum

September 19, 2023

Project# 29131

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

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

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

## TRANSIT AND HUMAN SERVICES PROVIDERS

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## Introduction

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

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

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

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



Table 1. Transit Providers in Marion and Polk Counties

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

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

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

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## STIF & Section 5310 Providers

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### Cherriots

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

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

### Cherriots Local

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

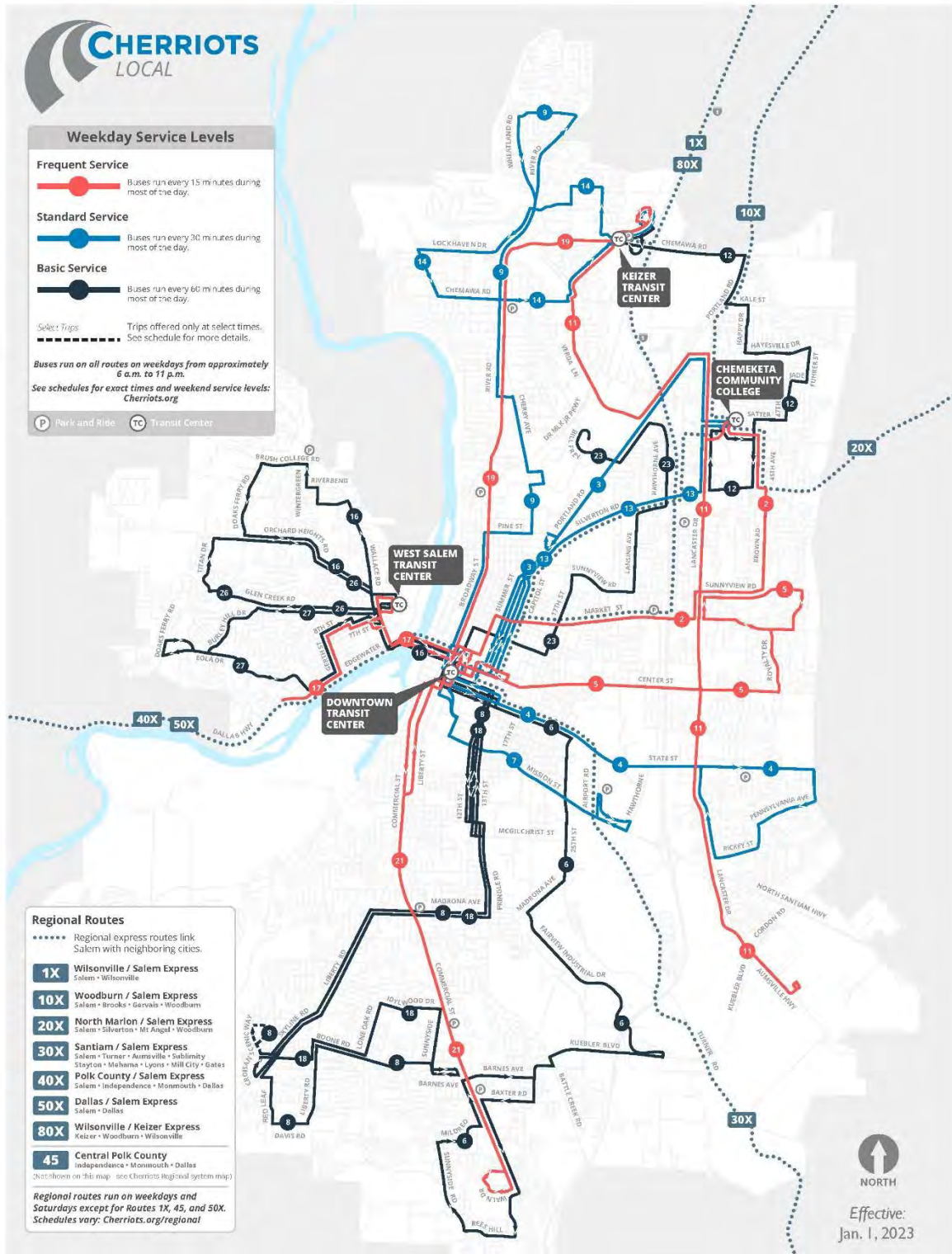
The current passes and fare options as of August 1, 2023, are summarized in Table 2.

Table 2. Cherriots Local and Cherriots Regional Fares

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

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

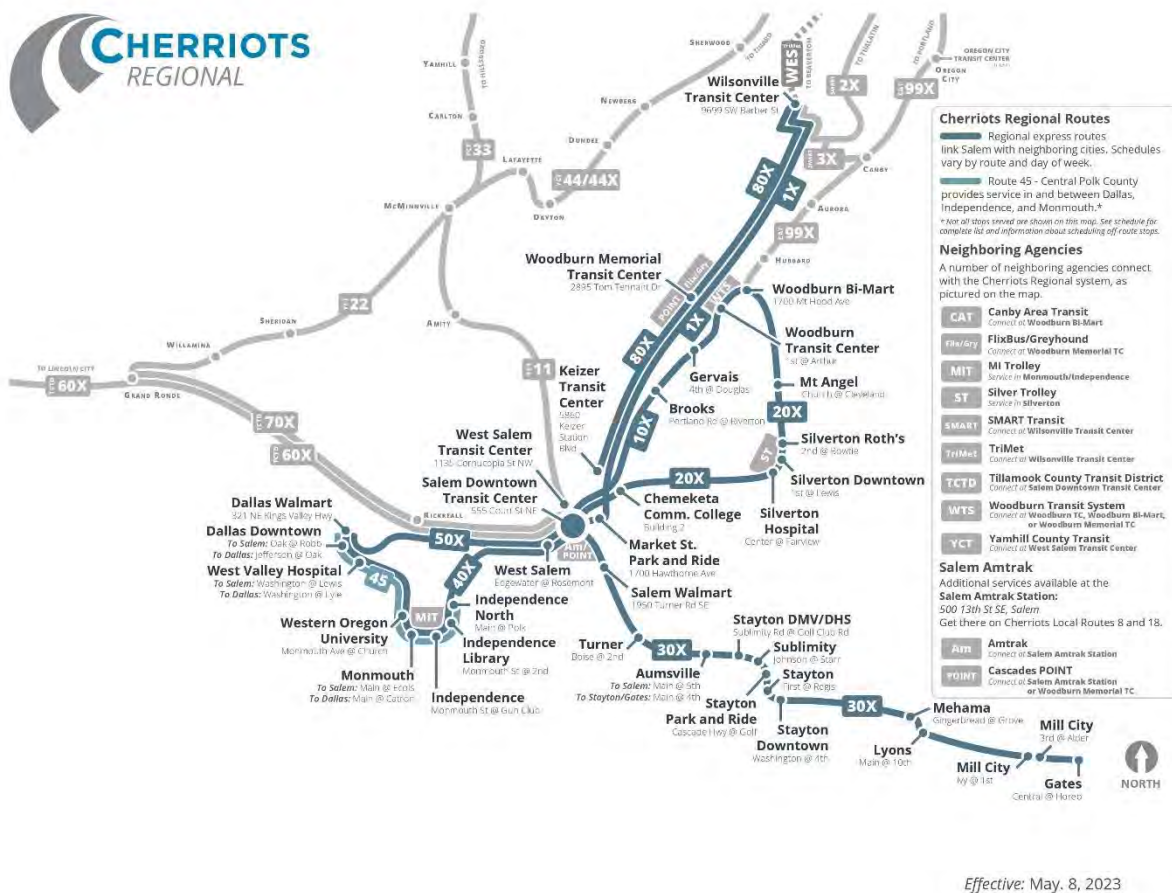
Figure 1. Cherrits Local Network



## Cherriots Regional

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

Figure 2. Cherriots Regional Network



## Cherriots LIFT

Cherriots LIFT is a shared-use paratransit service that offers origin-to-destination transportation to eligible individuals whose qualifying disabilities prevent them from using the Cherriots Local bus services. The service area for LIFT is all areas in the Salem/ Keizer UGB within 3/4 mile of Cherriots Local routes. Eligible participants can schedule a ride with LIFT Monday through Friday 5:30 a.m. to 9 p.m., Saturdays from 6 a.m. to 9 p.m., and Sundays from 8 a.m. to 8 p.m. The Cherriots Local fleet includes 43 buses. The cost is \$3.20 for a one-ride trip.

## Cherriots Dial-a-Ride and Shopper Shuttle

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

## City of Woodburn

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

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

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

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

Figure 3. WTS Fixed Route

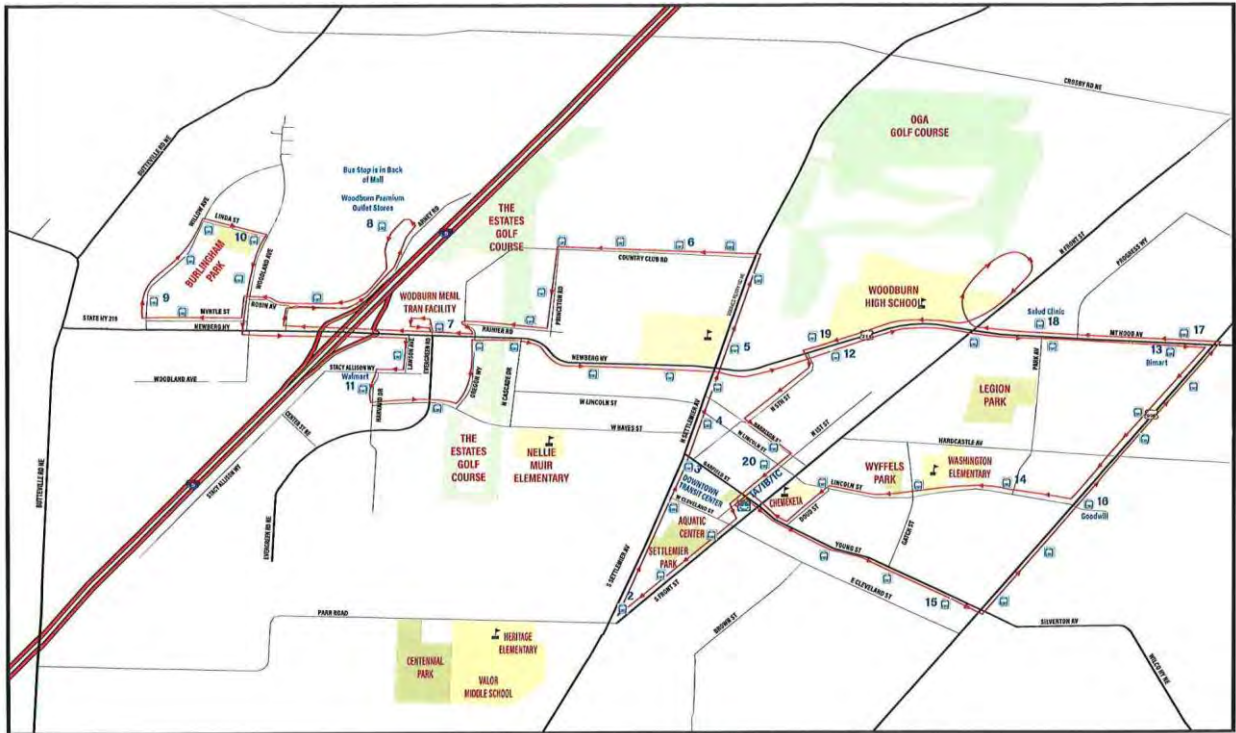


Figure 4. WTS Express Route





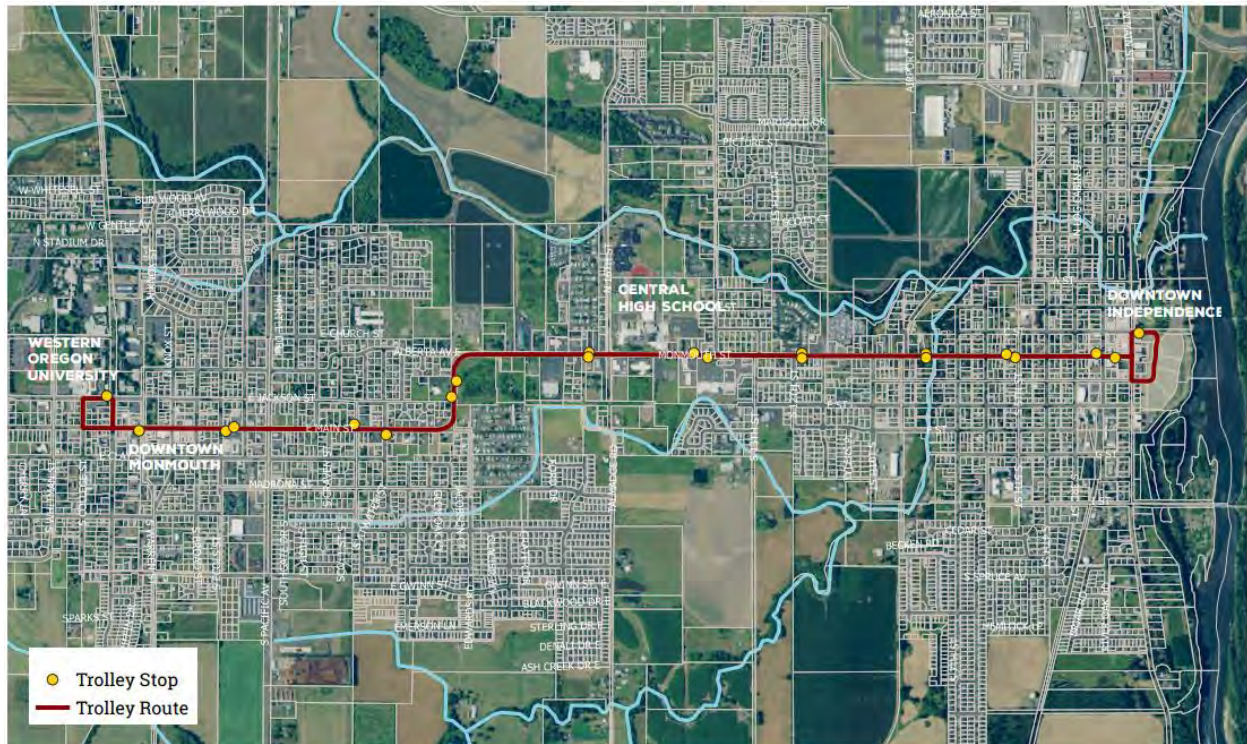
## City of Silverton

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

## Monmouth-Independence Trolley

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

Figure 5. MI Trolley Route



## Salem Health (West Valley Hospital)

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

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

## Garten

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

## Legacy Silverton Medical Center

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

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

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## Other Transportation Providers

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Other transportation services in Marion and Polk Counties include:

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

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

## Mobility Management

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

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

The goals and objectives of the Mobility Management Work Plan will be considered in the development of priorities and strategies for the Cherriots Coordinated Transit Plan Update for Marion and Polk Counties.

## Discontinued Services

Two services had been previously operated, but since discontinued, in Marion and Polk Counties, described as follows:

- Falls City Direct Connect (discontinued): The Falls City Direct Connect was a free shuttle that provided transportation to critical services in Dallas and Monmouth/ Independence. The service connected people to health, social, employment, and educational opportunities. The shuttle operated on Tuesdays and Thursdays to Dallas and once a month to Monmouth. Two of the stops connected to Cherriots Route 40X.
- Non-Emergent Medical Transportation (NEMT): Cherriots previously provided NEMT service in Marion and Polk Counties. NEMT service is now provided by LogistiCare.

## APPENDIX E: MEMO #4 – GOALS AND OBJECTIVES

# Technical Memorandum

January 30, 2024

Project# 29131

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

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

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

## GOALS AND OBJECTIVES

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## Introduction

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The purpose of the 2024 Cherriots Coordinated Plan Update is to serve as the guiding document that supports coordination amongst public transit and human service transportation providers to ensure that key populations in Marion and Polk Counties are served as efficiently as possible. The goals and objectives identified in the Coordinated Plan Update focus on the transportation needs, gaps, and challenges of seniors and people with disabilities in Marion and Polk Counties. The Plan Update supports the development of long-term funding strategies for the Salem Area Mass Transit District ("District"), or Cherriots, the qualified entity for determining how Statewide Transportation Improvement Fund (STIF) and Section 5310 (\$5310) dollars are spent in the rural and urban areas of Marion and Polk Counties. This memorandum documents the goals and objectives of the 2024 Cherriots Coordinated Plan Update.

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## Review of Relevant Plans

---

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

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

## Oregon Public Transportation Plan (OPTP) (2018)

The Oregon Public Transportation Plan (OPTP) outlines a long-term vision for public transportation in Oregon. The purpose of the OPTP is to provide guidance for transportation agencies to establish planning and investment strategies to advance public transportation in communities across the state. The OPTP alongside the Oregon Transportation Plan (OTP) fulfills state and federal planning requirements for comprehensive long-range multimodal transportation planning. In particular, the OPTP provides guided criteria for STIF funding and supports requirements and priorities for distribution of STIF funding. The OPTP establishes ten goals that support the long-range vision for public transportation in Oregon:

- Goal 1: Mobility – Public Transportation User Experience
- Goal 2: Accessibility and Connectivity – Getting from Here to There
- Goal 3: Community Livability and Economic Vitality
- Goal 4: Equity
- Goal 5: Health
- Goal 6: Safety and Security
- Goal 7: Environmental Sustainability
- Goal 8: Land Use
- Goal 9: Funding and Strategic Investment
- Goal 10: Communication, Collaboration, and Coordination

## Cherriots Coordinated Plan (2019)

The 2019 Cherriots Coordinated Plan Update establishes five priorities identified from findings of the needs assessment. These priorities are listed in descending order, with one being the highest priority:

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

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

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

- Enhance rider experience and sense of dignity by being sensitive and attentive to the varied needs of people and by emphasizing a customer service model.

These priorities are reflected in a list of strategies that were developed to target transportation needs of seniors and people with disabilities. Strategies were organized into five categories: Transportation Service; Infrastructure; Coordination and Organization; Marketing, Customer Service, and Outreach; Technology; and Capital and Funding strategies.

The 2024 Cherriots Coordinated Plan Update will differ from the previous plan by identifying Goals and Objectives as a distinct section of the plan. The Goals and Objectives are less specific than the priorities and strategies in the previous plan. Prioritization will occur at later stages of the Plan Update process.

The goals and objectives for the 2024 Cherriots Coordinated Plan Update consider these priorities and strategies from the 2019 Plan Update.

## Cherriots Long Range Transit Plan (LRTP) (2022)

The Cherriots Long Range Transit Plan (LRTP) is the first 20-year planning document for the District. The LRTP frames strategies and actions that can be implemented by the District to ensure an efficient and safe transit system for the next 20 years. The development of the LRTP included extensive in-person and virtual public engagement activities, including representatives from key populations such as seniors, low-income individuals, and people experiencing physical, intellectual, or developmental disabilities and visual impairments.

The LRTP defines six strategies that meet the long-range vision, mission, values, and priorities established by the District. These strategies include:

1. Meeting commitments on existing service goals
2. Adding service frequency and reliability to Cherriots Local and Regional routes
3. Building Cherriots into a Mobility Integrator
4. Enhancing bus stops and transit centers
5. Building partnerships with local jurisdictions for service expansion and land use integration
6. Becoming a leader in environmental sustainability through clean transportation choices

## Cherriots Strategic Plan (FY 2024)

The Salem Area Mass Transit District (SAMTD) Strategic Plan establishes four core areas of service/operation and a series of work plan tactics to improve performance. The core areas and their associated organizational work tactics are summarized below.

- 1: Community Value
  1. Initiate Development of a Climate Action Plan
  2. Integration of Battery Electric Buses / Zero-Emission Awareness
  3. Access
  4. Community Value Surveys
- 2: Customer Satisfaction
  1. Customer Satisfaction Survey
  2. E-fare Implementation
  3. Cherriots Intelligent Transportation System (CITS)
  4. Clean and Safe Passenger Amenities
- 3: Culture of Ownership
  1. Merit-Based Performance Management System

2. Management and Resource Tracking Instrument (MARTI)
  3. Diversity, Equity, and Inclusion (DEI)
  4. Employee Engagement Survey
- 4: Financial Sustainability
    1. Financial Story (Revenue sources)

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## Outreach Findings

---

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

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

Key findings from these activities are summarized below.

### Needs Identified through Public Involvement Events

- Maintain on-demand services and enhance on-demand options for medical services.
- Increased frequency of fixed-route services is desired, especially for connections to Salem and Portland.
- Increased transit service for local circulators in Silverton, Monmouth-Independence, and Dallas are needed, with opportunities for deviating from fixed routes to eliminate the challenge of getting to and from transit stops.
- Education and marketing about what services are available and how to use them. Outreach and marketing for the travel training services offered by Cherriots will promote awareness of the program.

### Needs Identified through the Online Survey

- Increased transit service frequency, including direct service to Santiam Hospital, more local service frequency in Salem-Keizer, service to Falls City, and more regional connections beyond County lines.
- Service locations/ transit stops closer to where they want to go, including closer to specific neighborhoods within Salem-Keizer, connections to rural and regional destinations, and grocery stores.
- More amenities at bus stops. Shelters, benches, trash receptacles, and lighting are needed.
- Respondents valued the friendly drivers and staff, availability of services, and affordability – especially for seniors.

### Needs Identified through Provider Input

- Increased transit service to rural communities in Marion and Polk Counties is desired, especially to provide transit options for residents to access essential medical or other life services.
- Support or enhancement of volunteer driver programs to ensure consistency and reliability of the service.



- Outreach, marketing, and education about transit and travel training programs are desired. Route finding using Cherriots web page is challenging with the existing platform.
- Additional coordination for first- and last-mile travel is needed. Traveling to and from transit stops on pedestrian facilities can be difficult or even completely inaccessible for people with physical disabilities, vision or hearing impairments, and those using a mobility device.
- Safer and more comfortable transit stops are desired. Shelters, benches, trash receptacles, and lighting are needed.
- Funding is an ongoing challenge.
- Additional coordination between transit programs, including medical service vans, would encourage more efficient sharing of information amongst providers.

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## Draft Goals and Objectives

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The review of relevant plans, feedback from public engagement, and discussions with the District formed the basis for the draft goals and objectives for the Coordinated Plan Update. The three draft goals and associated objectives for each goal are summarized below.

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

*SAMTD Strategic Plan Core Area(s): Community Value and Customer Satisfaction*

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

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

*SAMTD Strategic Plan Core Area(s): Community Value and Customer Satisfaction*

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

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

*SAMTD Strategic Plan Core Area(s): Funding Sustainability and Culture of Ownership*

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

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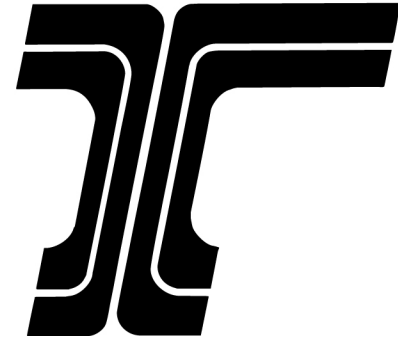
## Next Steps

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Cherriots reviewed the proposed draft goals and objectives and provided feedback to the project team. The goals and objectives will serve as the basis for developing and prioritizing strategies as part of the 2024 Cherriots Coordinated Plan Update.

# APPENDIX F: SAMPLE GRANT APPLICATIONS AND INSTRUCTIONS

# Oregon Department of Transportation



## PTSP Project Application

FY 2023-25

### 1. Public Transportation Service Provider

Service Provider Name

Service Provider Contact Name

Service Provider Contact Title

Service Provider Phone Number

Service Provider Email

Service Provider Type

Employer Identification Number (EIN)

Service Provider Website

### 2. Qualified Entity representing Public Transportation Service Provider

Qualified Entity Name

STIF Plan Contact Name

STIF Plan Contact Title

STIF Plan Contact Phone Number

STIF Plan Contact Email

*This email address will receive the completed PTSP Project Template.*

End Date of QE STIF Plan

### 3. Local Plan Compliance

#### 3.1 Existing Local Plans from which project(s) are derived.

##### Local Plan 1

Local Plan Name

Governing Body that adopted  
Local Plan

Plan Adoption Date

Local Plan web address

Upload copy of Local Plan if it's not available on a website.

Limit 100 MB

#### 2.2 Local Plan requirements

I agree that all Local Plans are consistent with the STIF requirements specified in OAR 732-040-0005(18)

Yes

No, one or more Local Plans are not yet consistent with STIF rule requirements.

### 3. Projects

#### 3.1 Project Detail Entry

##### Project 1

Public Transportation Service Provider or Qualified Entity Name

Project Name

Limit 50 characters

Project Description

**Limit 1000 Characters**

**Do you plan to expend funding in a future STIF Plan period?**

- Yes
- No

**Percent of project budget in district**

### **Project budget share to improve, expand or maintain public transportation service**

**Improve or Expand Service**

**Maintain Service**

**Local Plan this project is derived from:**

**Local Plan Page Number**

### **Multi-Phase Project**

**Is your project part of a larger multi-phase project?**

### **3.1.1 Project Scope**

#### **Task 1**

**Task Description**

**Examples:**

- Purchase and installation of up to 12 branded bus stop signs.
- This task provides resources for additional peak service to accommodate increased demand associated with implementation of the Youth Fare program.

**Limit 250 Characters**

**Category**

- Vehicle Purchase 111-00
- Equipment Purchase
- Facility Purchase
- Signs/Shelters Purchase
- Operations 30.09.01 (Operating Assistance)
- Planning 44.20.00
- Preventive Maintenance 11.7A.00
- Project Administration 11.79.00
- Mobility Management 11.7L.00
- Communications 44.26.14
- Program Reserve 11.73.00
- Capital 117-00 Other Capital Items (Bus)

**Planning Task Category**

Task Category Amount

**3.1.2 Expenditure Estimates**

**Expenditures by Fund Source and Fiscal Year**

*Enter estimates of all expenditures for activities in this task denoting both fund source and fiscal year of expenditure. Do not enter more than 8 fund sources.*

Fund Type	2024	2025	2026	2027	Total
STIF	<input type="text"/>	<input type="text"/>			<input type="text"/>
Federal	<input type="text"/>	<input type="text"/>			<input type="text"/>

Local				
Other State				
Other funds				
FY19-21 Unspent STIF Funds				
FY19-21 STIF Interest Accrued				
FY19-21 Program Reserve				

\$0.00      \$0.00      \$0.00      \$0.00      \$0.00

By checking this box, I confirm that this project task is only funded by STIF.

### 3.1.3 Outcome Measures

#### Optional Outcome Measures

**Outcome Measure 1**

**All Project Types**

Other Measure

Number of Units:

#### Task 2

Task Description



**Examples:**

- Purchase and installation of up to 12 branded bus stop signs.
- This task provides resources for additional peak service to accommodate increased demand associated with implementation of the Youth Fare program.

**Limit 250 Characters**

**Category**

- Vehicle Purchase 111-00
- Equipment Purchase
- Facility Purchase
- Signs/Shelters Purchase
- Operations 30.09.01 (Operating Assistance)
- Planning 44.20.00
- Preventive Maintenance 11.7A.00
- Project Administration 11.79.00
- Mobility Management 11.7L.00
- Communications 44.26.14
- Program Reserve 11.73.00
- Capital 117-00 Other Capital Items (Bus)

**Specify the mode that this task will support.**

- Fixed Route
- Demand Response

**Operations Task Category**

**Task Category Amount**

\$0.00

### 3.1.2 Expenditure Estimates

#### Expenditures by Fund Source and Fiscal Year

Enter estimates of all expenditures for activities in this task denoting both fund source and fiscal year of expenditure. Do not enter more than 8 fund sources.

Fund Type	2024	2025	2026	2027	Total
STIF	\$0.00	\$0.00			\$0.00
Federal	\$0.00	\$0.00			\$0.00
Other State	\$0.00	\$0.00			\$0.00
Local	\$0.00	\$0.00			\$0.00
Other Funds	\$0.00	\$0.00			\$0.00
FY19-21 Unspent STIF Funds	\$0.00	\$0.00			\$0.00
FY19-21 STIF Interest Accrued	\$0.00	\$0.00			\$0.00
FY19-21 Program Reserve	\$0.00	\$0.00			\$0.00
	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

By checking this box, I confirm that this project task is only funded by STIF.

### 3.1.3 Outcome Measures

#### Minimum required measures for operations tasks

Revenue Miles

Revenue Hours

Rides

Number of people with access to transit (within 1/2 mile of transit stop for fixed route)

**Number of Low-Income Households with access to transit (within ½ mile of transit stop for fixed route)**

**Number of new shared stops with other transit providers (reducing fragmentation in transit services)**

**Is this project supporting student transportation?**

## Choose at least one

### Operations

- Number of students in grades 9-12 with free or reduced fare transit pass
- Number of students in grades 9-12 attending a school served by transit
- Number of rides provided to students in grades 9-12
- Other

### Operations - Demand Response

- Number of students in grades 9-12 served by demand response

### Other Measure

### Number of Units

**Number of students in grades 9-12 served by demand response**

## Optional Outcome Measures

### Outcome Measure 1

#### All Project Types

#### Other Measure

**Number of Units:**

## Task 3

## Task Description

### Examples:

- Purchase and installation of up to 12 branded bus stop signs.
- This task provides resources for additional peak service to accommodate increased demand associated with implementation of the Youth Fare program.

### Limit 250 Characters

#### Category

- Vehicle Purchase 111-00
- Equipment Purchase
- Facility Purchase
- Signs/Shelters Purchase
- Operations 30.09.01 (Operating Assistance)
- Planning 44.20.00
- Preventive Maintenance 11.7A.00
- Project Administration 11.79.00
- Mobility Management 11.7L.00
- Communications 44.26.14
- Program Reserve 11.73.00
- Capital 117-00 Other Capital Items (Bus)

## Program Reserve Task

### Category

Task Category Amount

## 3.1.2 Expenditure Estimates

## Expenditures by Fund Source and Fiscal Year

Enter estimates of all expenditures for activities in this task denoting both fund source and fiscal year of expenditure. Do not enter more than 8 fund sources.

Fund Type	2024	2025	2026	2027	Total
STIF	\$0.00	\$0.00			\$0.00
Federal	\$0.00	\$0.00			\$0.00
Other State	\$0.00	\$0.00			\$0.00
Local	\$0.00	\$0.00			\$0.00
Other Funds	\$0.00	\$0.00			\$0.00
FY19-21 Unspent STIF Funds	\$0.00	\$0.00			\$0.00
FY19-21 STIF Interest Accrued	\$0.00	\$0.00			\$0.00
FY19-21 Program Reserve	\$0.00	\$0.00			\$0.00
	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

By checking this box, I confirm that this project task is only funded by STIF.

### 3.1.3 Outcome Measures

#### Optional Outcome Measures

##### Outcome Measure 1

##### All Project Types

##### Other Measure

##### Number of Units:

### 3.2 Allocation of STIF funds by project

#### STIF Criteria

1. Increased frequency of bus service to areas with a high percentage of Low-Income Households.
2. Expansion of bus routes and bus services to serve areas with a high percentage of Low-Income Households.
3. Fund the implementation of programs to reduce fares for public transportation in communities with a high percentage of Low-Income Households.
4. Procurement of low or no emission buses for use in areas with 200,000 or more.
5. The improvement in the frequency and reliability of service between communities inside and outside of the Qualified Entity's service area.
6. Coordination between public transportation service providers to reduce fragmentation in the provision of transportation services.
7. Implementation of programs to provide student transit service for students in grades 9-12.

**FY 2024 STIF**  
Total\$0.00

**FY 2025 STIF**  
Total\$0.00

#### **Fund Allocation (Must not exceed 100% per criterion per fiscal year)**

*If some criteria don't apply, fill in with zeros. Do not remove or add additional criterion.*

Criterion	FY 2024	FY 2025	FY 2026	FY 2027
Criterion 1				
Criterion 2				
Criterion 3				
Criterion 4				
Criterion 5				
Criterion 6				
Criterion 7				
	<b>100.00%</b>	<b>100.00%</b>	<b>0.00%</b>	<b>0.00%</b>

### 3.3 Oregon Public Transportation Plan Goals

Select at least one goal.

For more information about these goals, please refer to page eight of the [Oregon Public Transportation Plan](#).

Select the OPTP goals that apply to your STIF Plan Projects.

- Goal 1 Mobility: Public Transportation User Experience
- Goal 2: Accessibility and Connectivity
- Goal 3: Community Livability and Economic Vitality
- Goal 4: Equity
- Goal 5: Health
- Goal 6: Safety and Security
- Goal 7: Environmental Sustainability
- Goal 8: Land Use
- Goal 9: Funding and Strategic Investment
- Goal 10: Communication, Collaboration, and Coordination

### 3.4 Project Summary

**Project Name**

Service Expansion Study and Transit Coordinator

**STIF Project Grand Total**

\$0.00

**FY 2024 STIF Project Total**

\$0.00

**FY 2025 STIF Project Total**

\$0.00

**FY 2024 percent of STIF Funds supporting student transportation**  
\_%

**FY 2025 percent of STIF Funds supporting student transportation**  
\_%

### 4. All Projects Totals

**PTSP Projects Total**  
\$0.00

**Amount Carried Forward**  
\$0.00

**Amount in District**  
\$0.00

**Amount out of District** \$0.00

**FY 2024 Total STIF Funds**  
\$0.00

**FY 2025 Total STIF Funds**  
\$0.00

**FY 2024 Student STIF Funds**  
\$0.00

**FY 2025 Student STIF Funds**  
\$0.00

**FY 2024 Percent of STIF  
Funds supporting  
student transportation**  
\_\_\_%

**FY 2025 Percent of  
STIF Funds supporting  
student transportation**  
\_\_\_%





August 2022



## 2023-25 Statewide Transportation Improvement Fund Program Application Instructions

In coordination with the Statewide Transportation Improvement Fund (STIF) Program Guidebook, this step-by-step guide walks users through the web-based STIF Plan.

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## STIF Plan Format and Use

The Statewide Transportation Improvement Fund (STIF) Plan is a fillable, web-based form that serves as the mechanism for accessing STIF Formula funds. ODOT creates and publishes this form each solicitation cycle and accessing it requires an internet connection.

This resource is a step-by-step guide for completing and submitting the STIF Plan. For more information about the STIF Formula program and a summary of requirements, please see the [STIF Program Guidebook](#).

The [STIF Plan](#) can be found online. The form can also be accessed through the STIF Formula section of the [Public Transportation Funding Opportunities Page](#). Chrome, Firefox, and Edge are the recommended web browsers. The form will not function in Internet Explorer since Microsoft has ended support for this browser.

The STIF Plan uses a combination of check boxes, yes or no questions, text boxes, and buttons for uploading documents and adding information. All questions on the form must be answered unless specified as optional. Failure to respond could result in Oregon Department of Transportation's (ODOT) determination that the STIF Plan is incomplete and re-submittal is required. Some yes or no questions, when checked, generate additional questions from a drop-down menu based on the response. It is very important to answer all questions as they generate additional choices.

When you first access the STIF Plan, select the "Save" button, located in the lower right-hand corner of the form. After pressing "Save," a window will appear showing a personalized link for your STIF Plan (Figure 1).

**Figure 1: Saving the STIF Plan**

The screenshot shows a confirmation window with the following content:

- Title:** Your progress has been saved.
- Text:** Copy or email the link below and return to your form to complete your submission.
- Text:** Copy your form link:
- Text:** <https://www.cognitofrms.com/ODOT2/STIFPlanJuly2022PagesVersio>
- Text:** Email me my link:
- Form:** An empty text input field for an email address.
- Button:** A blue button labeled "Send".

This link can be copied, saved, and then pasted into the search bar of your internet browser to return to the last saved version of the form. You may also enter your email address here and press "Send" to have a link to the form emailed to you.

**Always use the "Save" button before closing the form to save data entered during that session.** When you have finished entering all STIF Plan information, you will submit the form to ODOT using the "Submit STIF Plan" button. Upon submittal, a copy of the completed form will be emailed to you for your records and to ODOT for processing.

Please do not print and scan your application to us. Printed and scanned forms will only be accepted in extraordinary circumstances. If you would like to print your STIF Plan for use locally, be mindful that you may need to print each section separately as the STIF Plan has been divided into six sections (with tabs at the top for each section).

ODOT has also created an optional form for use by sub-recipients to provide their Qualified Entity (QE) with all of the information required for each project. The [Sub-Recipient Project Application form](#) can be found online. When a sub-recipient submits the form, the information is sent to their Qualified Entity who can use it as a reference when submitting the STIF Plan.

Beginning in the 2023-25 cycle, Qualified Entities may choose to upload approved Sub-Recipient Project Applications instead of manually entering the same information on the STIF Plan form. More information about this optional step can be found in Section 6. Use of the Sub-Recipient Project Application form is not a required step in the application process, but is a helpful tool used successfully by most entities in previous STIF Plan cycles.

If you have technical problems using either form, please contact Brian Roth, Web and Forms Developer for ODOT's Public Transportation Division, at 541-508-9862 or by email at [Brian.Roth@odot.oregon.gov](mailto:Brian.Roth@odot.oregon.gov). For answers to programmatic or process-specific questions, contact your [regional transit coordinator](#).

## STIF Plan Organization

The STIF Plan has the following seven sections:

- Qualified Entity
- Advisory Committees
- Local Plan Compliance
- Accountability
- STIF Plan Period and Adoption
- Projects
- STIF Plan Summary

There are tabs at the top of the STIF Plan pertaining to each of those sections except STIF Plan Summary. Once you're finished entering information on a given page and have moved onto the

next one, you will be able to return to the previous page by clicking the section name at the top. You will be able to toggle between completed pages until you submit the STIF Plan.

## STIF Plan Form

### 1. Qualified Entity Information

Select the Qualified Entity name from the drop-down menu. Complete each field in this section with the appropriate contact information (Figure 2).

**Figure 2: Qualified Entity Information**

#### 1. Qualified Entity

Qualified Entity Name \*

Qualified Entity Address \*

Address Line 1

City  Oregon  Zip Code

STIF Plan Contact Name \*

STIF Plan Contact Title \*

STIF Plan Contact Email \*

STIF Plan Contact Phone Number \*

Employer Identification Number (EIN) \*

Will any of the projects in this STIF Plan use funds jointly managed with one or more other Qualified Entities? \*

For the last question, select "Yes" from the drop-down menu if any STIF Plan projects use funds that will be jointly managed by more than one Qualified Entity. Select the "Upload" button to attach documentation of the joint management agreement. Some examples of a joint management agreement include a memorandum of understanding, an intergovernmental agreement, or a Governing Body resolution.

If no STIF Plan projects use funds that will be jointly managed by more than one Qualified Entity, select "No" from the drop-down menu.

### 1.1 Sub-Recipients in STIF Plan

If there are no sub-recipients in this STIF Plan, keep the default response in the first question set to "No" to verify that the Qualified Entity is the only service provider in the STIF Plan.

If there are any sub-recipients in this STIF Plan, select "Yes" in the first question, and complete all fields with the correct information (Figure 3). This setting allows all fields to populate each time the "+Add Provider" button is selected. Continue to add providers to the STIF Plan until all entities have been entered.

**Figure 3: Expanded Form when Sub-Recipients Are in the STIF Plan**

**1.2 Sub-Recipients in STIF Plan**

⊗ **Provider 1**

Are any Sub-Recipients included in this STIF Plan? \*

Yes

Provider Name \*

Sub-Recipient Contact Name \*      Sub-Recipient Contact Title \*

Sub-Recipient Phone Number \*      Sub-Recipient Email \*

Sub-Recipient Type \*      Sub-Recipient Employer Identification Number (EIN) \*

Sub-Recipient Website \*

+ Add Provider

## 2. Advisory Committees

### 2.1 Advisory Committee Website

Review all of the Advisory Committee requirements specified in the Advisory Committee section and Oregon Administrative Rules (OARs) [732-040-0030](#), [732-040-0035](#), and [732-042-0020](#) (Figure 4). Check the box to agree that all Advisory Committee requirements have been met before proceeding.

**Figure 4: Advisory Committee Information**

### 2. Advisory Committees

#### 2.1 Advisory Committee Website

By checking this box, I agree that all Advisory Committee requirements of OARs 732-040-0030, 732-040-0035 and 732-042-0020 have been met, including, but not limited to: required constituencies, written bylaws, public meetings, and STIF Plan project review and prioritization.

Advisory Committee Web Address

If this information is not available on a website, you must upload other documentation that demonstrates how Advisory Committee information was published.

or drag files here.

Limit 100 MB

Did the QE's Advisory Committee or Governing Body convene an optional work group as outlined in OAR 732-040-0030? \*

Yes

No

Please upload meeting minutes demonstrating that input from the optional work group was considered as part of the Advisory Committee process. \*

or drag files here.

Enter the Advisory Committee website address in the appropriate field.

Copies of the Advisory Committee bylaws, meeting minutes, and meeting notices must be published by the Qualified Entity and made available for public review in a reasonable and timely manner. If this information is not available on a website, you may upload other documentation that demonstrates how the Advisory Committee requirements have been met and that the information was made publicly available by selecting the "Upload" button.



If the Qualified Entity's Advisory Committee or Governing Body convened an optional work group as outlined in OAR 732-040-0030, select "Yes." You may upload the meeting minutes demonstrating that input from the work group was considered as part of the Advisory Committee process by selecting the "Upload" button. If the Qualified Entity's Advisory Committee or Governing Body did *not* convene an optional work group as outlined in OAR 732-040-0030, select "No."

### 3. Local Plan Compliance

#### 3.1 Existing Local Plans from Which Project(s) Are Derived

Enter the local plan name from which the projects in the STIF Plan were derived (Figure 5). Reference [OAR 732-040-0005\(18\)](#) for the Local Plan definition. Examples of local plans that may meet these requirements include coordinated public human services transportation plans, transportation system plans, transit development plans, and transit master plans. ODOT's regional transit coordinators can help you identify and evaluate your local plans for compliance with STIF rules.

**Figure 5: Existing Local Plans from Which Project(s) Are Derived**

### 3. Local Plan Compliance

#### 3.1 Existing Local Plans from which project(s) are derived.

⊗ **Local Plan 1**

Local Plan Name *	Governing Body that adopted Local Plan *	Plan Adoption Date *
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>

Local Plan Web Address \*

Upload copy of Local Plan if it is not available on a website. \*

or drag files here.

Limit 100 MB

Enter the name of the board, council, commission, or other Governing Body that approved the local plan; the adoption date; and the web address where the local plan may be referenced. If

this information is not available on a website, you may upload a copy of the relevant plan or policy. Select "+Add Local Plan" to list additional local plans.

### 3.2 Local Plan Requirements

Select "Yes" if all local plans are consistent with STIF Rule requirements (Figure 6).

#### Figure 6: Local Plan Consistency with STIF Rule Requirements

**3.2 Local Plan requirements**

I agree that all Local Plans are consistent with the STIF requirements specified in OAR 732-040-0005(18) \*

Yes

No, one or more Local Plans are not yet consistent with STIF rule requirements.

Select "No" if one or more local plans are not yet consistent with STIF Rule requirements. Describe why a local plan is not compliant with STIF requirements (Figure 7).

#### Figure 7: Non-Compliant Local Plans

If one or more Local Plans are non-compliant, identify which Local Plan is non-compliant, describe how it is non-compliant, and the schedule to bring it into compliance. \*

Limit 500 Characters

## 4. Accountability

### 4.1 Accountability Methods

Select both boxes to affirm that all of the required policies and procedures are in place (Figure 8). Review [OAR 732-040](#) and [OAR 732-042](#) (paying particular attention to Audit and Compliance Review Requirements) if necessary before agreeing to these statements.

## Figure 8: Accountability Methods Acknowledgement

### 4. Accountability

*You may insert a web address in place of a description or document upload, as long as the information is sufficient enough to warrant approval of the STIF Plan and comply with STIF Rule.*

#### 4.1 Accountability methods

By checking this box, I affirm that all of the necessary policies and procedures are in place to provide reasonable assurance that compliance with OAR 732, Divisions 40 and 42 is met, and to achieve the goals and outcomes specified in this STIF Plan, including, but not limited to: program and financial management, operations management, procurement, use and maintenance of equipment, records retention, compliance with state and federal laws, civil rights, and compliance with ADA.

By checking this box, I affirm that all of the necessary policies and procedures are in place to provide reasonable assurance that compliance of all Sub-Recipients with OAR 732, Divisions 40 and 42 is met to achieve the goals and outcomes specified in this STIF Plan, address deficiencies in Sub-Recipient performance, and to provide reasonable assurance that the Qualified Entity can accomplish the applicable requirements of these rules, including but not limited to: audit and compliance requirements, accounting requirements, capital asset requirements, and reporting requirements.

## 4.2 Sub-Allocation Method

Select the box to affirm that all data used to develop the sub-allocation method have been shared with the appropriate parties. Enter a description of your sub-allocation method in the field provided or upload your response (Figure 9). For Qualified Entities that are the only Public Transportation Service Provider within their area of responsibility and where no other potential Public Transportation Service Provider has expressed interest in applying for STIF Formula funding, you may describe these conditions and specify that sub-allocation isn't possible.

## Figure 9: Sub-Allocation Description

### 4.2 Sub-Allocation method

By checking this box, I affirm that all data used to develop the sub-allocation method was shared with each Public Transportation Service Provider and other potential sub-recipients, as relevant.

Describe the Qualified Entity's method for sub-allocating STIF Formula Fund moneys and the collaborative process used to work with Public Transportation Service Providers and other potential Sub-Recipients, as relevant, to develop the sub-allocation method. \*

*Limit 1000 Characters*

Upload Response \*

or drag files here.

*Limit 100 MB*

### 4.3 High Percentage of Low-Income Households

Enter your explanation in the field provided or upload your response (Figure 10).

**Figure 10: High Percentage of Low-Income Households Explanation**

**4.3 High Percentage of Low-Income Households**

Explain how the STIF Plan defines and identifies communities with a high percentage of Low-Income Households. \*

Limit 1000 Characters

Upload Response \*

Upload or drag files here.

Limit 100 MB

## 5. STIF Plan Period and Adoption

### 5.1 Period Covered by STIF Plan

Enter the start and end dates for all projects in this STIF Plan (Figure 11). The earliest possible start date for this solicitation cycle is July 1, 2023. A STIF Plan can be for one or two biennia, so the end date for this funding cycle would either be June 30, 2025, or June 30, 2027.

**Figure 11: Start and End Dates for All Projects in the STIF Plan**

**5. STIF Plan Period and Adoption**

**5.1 Period Covered By STIF Plan**

Provide start and end dates for projects proposed for funding in this STIF Plan. The earliest possible start date is July 1, 2023.

Start Date: \* End Date \*

7/1/2023
📅

▼

### 5.2 STIF Plan Adoption

Enter the appropriate dates in the fields provided (Figure 12). Enter the website where the Governing Body adoption document is located or press "Upload" to attach a file if the website is unavailable.

**Figure 12: STIF Plan Adoption and Governing Body Information**

**5.2 STIF Plan Adoption**

STIF Plan Advisory Committee recommendation date \* STIF Plan Governing Body adoption date \*

Website where Governing Body adoption document is located \*

Upload Governing Body adoption document if website is unavailable. \*

or drag files here.

Limit 100 MB

Did the Governing Body modify the Advisory Committee's recommended STIF Plan? \*

Yes
▼

If yes, explain why the Governing Body modified the Advisory Committee's recommended STIF Plan. \*

✍

Limit 1000 Characters

If the Governing Body modified the Advisory Committee's recommended STIF Plan, select "Yes" from the drop-down menu. Explain why the Governing Body modified the Advisory Committee's recommended STIF Plan in the text box that appears.

If the Governing Body did not modify the Advisory Committee's recommended STIF Plan, select "No" from the drop-down menu.

## 6. Projects

### 6.1 Project Detail Entry

Beginning this cycle, you may now upload Sub-Recipient Project Applications instead of manually entering the information for each sub-recipient (Figure 13). All uploaded Sub-Recipient Project Applications must be approved by the Qualified Entity's Governing Body and will be recognized as part of the Qualified Entity's STIF Plan.

In addition to this, any Qualified Entities with their own STIF Plan projects may enter that information directly into the STIF Plan form, or may choose to upload their own Sub-Recipient Project Application. In all cases, you cannot split information for a single entity between the STIF Plan and an uploaded Sub-Recipient Project Application. All project information for a given

entity must be contained either solely within the Sub-Recipient Project Application or STIF Plan itself.

If you'd like to use this optional upload feature, enter the total amount from each Sub-Recipient Project Application in the conditional boxes that appear in Figure 14 (this information can be found in the last section of the Sub-Recipient Project Application). This will ensure that the sum of all Qualified Entity and sub-recipient projects are included in STIF Plan Section 7 STIF Plan Summary.

### Figure 13: Optional Upload of Approved Sub-Recipient Project Applications

#### 6. Projects

Beginning this cycle, you may now upload Sub-Recipient Project Applications instead of manually entering the information for each sub-recipient. All uploaded Sub-Recipient Project Applications must be approved by the Qualified Entity's Governing Body, and will be recognized as part of the Qualified Entity's STIF Plan.

In addition to this, any Qualified Entities with their own STIF Plan projects may enter that information directly into the STIF Plan, or may choose to upload their own Sub-Recipient Project Application. In all cases, you cannot split information for a single entity between the STIF Plan and an uploaded Sub-Recipient Project Application. All project information for a given entity must be contained either solely within the Sub-Recipient Project Application or STIF Plan itself.

**Important note:** If you'd like to use this optional upload feature, please enter the total amount from each Sub-Recipient Project Application in the conditional boxes that will appear below (this information can be found in the last section of the Sub-Recipient Project Application). This will ensure that the sum of all Qualified Entity and sub-recipient projects are included in STIF Plan section 7. STIF Plan Summary.

Would you like to upload any approved Sub-Recipient Project Applications for this STIF Plan? \*

Yes

No

**Figure 14: Optional Project Detail Entry for Sub-Recipient Project Applications**

### 6.1 Project Detail Entry

⊗ **Sub-Recipient 1**

Upload Project Application Here \*

Upload

or drag files here.

Sub-Recipient Name \*

Sub-Recipient Project Application Total *	Amount Carried Forward *

FY 2024 Total STIF Funds *	FY 2025 Total STIF Funds *
FY 2024 Student STIF Funds *	FY 2025 Student STIF Funds *
FY 2024 Percent of STIF Funds supporting student transportation *	FY 2025 Percent of STIF Funds supporting student transportation *
FY 2024 Older and Disabled Persons STIF Funds	FY 2025 Older and Disabled Persons STIF Funds
FY 2024 Total STIF Funds From Previous Cycle *	FY 2025 Total STIF Funds From Previous Cycle *

*Includes FY 21-23 Unspent Funds, Interest Accrued, Program Reserve*

*Includes FY 21-23 Unspent Funds, Interest Accrued, Program Reserve*

+ Add Sub-Recipient

If you choose not to use this optional upload feature, provide the following for Project 1 (Figure 15):

**Figure 15: Project Detail Entry for Project 1**

**6.1 Project Detail Entry**

⊗ **Project 1**

Qualified Entity or Sub-Recipient Name \*

Project Name \*

**Limit 50 characters**

Project Description \*

**Limit 1000 Characters**

Do you plan to expend funding in a future STIF Plan period? \*

Yes

No

- Enter the appropriate Qualified Entity or sub-recipient name.
- Enter a project name in the field provided. ODOT recommends that a project name is concise, similar to names used in Local Plans, and applicable to all project elements. Multi-phase projects will need to use the same name in future STIF Plans. The name is restricted to 50 characters to facilitate data collection and analysis.
- Enter a project description in the field provided. The project description is an opportunity to provide concise information about the project purpose and service elements. Suggested elements include the project location or extent, service span, frequency, stops, intended customers, vehicles, equipment, and marketing or other activities needed to implement service.
- Determine if you plan to expend funding in a future STIF Plan period for this project.
  - If “Yes,” enter information about this project in the fields that appear (Figure 16).
    - This is the last step for a project where funds will be expended in a future STIF Plan period.



- If there are other projects on this STIF Plan, select "+Add Project." Follow the instructions provided for Project 1 for all subsequent projects.
  - If there are no other projects on this STIF Plan, continue on to Section 7 STIF Plan Summary.
- If "No," enter information about this project in the fields that appear (Figure 17).
- If your answer to the question, "Is your project part of a larger, multi-phase project," is "Yes," you must complete the fields (Figure 18)<sup>1</sup>. For more information on this requirement, reference [OAR 732-042-0015\(3\)](#).
  - More information is required for projects without funds to be expended in a future STIF Plan period. Continue on to Section 6.1.1 Project Scope.

**Figure 16: Funds will be Expended in a Future STIF Plan Period**

Do you plan to expend funding in a future STIF Plan period? \*

Yes

No

If yes, what is the expenditure amount? \*

*This will be added to the total amount of STIF funds requested.*

What is the project type that you are carrying forward funds for? \*

Vehicle Purchase 111-00

Equipment Purchase

Facility Purchase

Signs/Shelters Purchase

Operations 30.09.01 (Operating Assistance)

Planning 44.20.00

Preventive Maintenance 11.7A.00

Project Administration 11.79.00

Mobility Management 11.7L.00

Communications 44.26.14

Program Reserve 11.73.00

Capital 117-00 Other Capital Items (Bus)

<sup>1</sup> Some major capital public transportation Projects and other types of Projects may be unable to reach completion within a single STIF Plan period. Applicants may have Projects that extend over multiple STIF Plan periods. If your Project is part of a larger multi-phased Project, select "Yes" from the drop-down box.

**Figure 17: Funds will Not be Expended in a Future STIF Plan Period**

Do you plan to expend funding in a future STIF Plan period? \*

Yes  
 No

**Project budget share to improve, expand or maintain public transportation service**

Improve or Expand Service \*    
 Maintain Service

Local Plan from which this project is derived: \*  Local Plan page number \*

**Multi-Phase Project**

Is your project part of a larger, multi-phase project? \*

**Figure 18: Project Is Part of a Multi-Phase Project**

**Multi-Phase Project**

Is your project part of a larger, multi-phase project? \*  Project Timeline \*

Total Project Budget (All Phases) \*  Other Planned Funding Sources \*  
 STIF  Federal  Other State  Local

Phase represented in current STIF Plan \*

Limit 200 Characters

### 6.1.1 Project Scope

Enter a description for this task in the field provided (Figure 19). Use the examples provided when considering the amount of detail to include in this description.

**Figure 19: Project Scope Task Description**

**6.1.1 Project Scope**

⊗ **Task 1**

Task Description \*

**Examples:**

- Purchase and installation of up to 12 branded bus stop signs.
- This task provides resources for additional peak service to accommodate increased demand associated with implementation of the Youth Fare program.

Limit 250 Characters

Choose the category that best describes this task item (Figure 20). Depending on which option you select, new field(s) will appear for you to enter more specific information about the item. Here's an overview of the extra information asked for each task category:

1. **Equipment, facility, and signs/shelters purchase:** Enter a brief description of the item followed by the quantity and unit cost.
2. **Operations:** Is this for fixed route or demand response service and what is the total cost (Task Category Amount)?
3. **Planning, Preventive Maintenance, Project Administration, Mobility Management, Communications, and Program Reserve:** What is the total cost?
4. **Vehicle purchase:** Is this a replacement, expansion, or other type of capital vehicle purchase?
5. **Capital (Other Capital items):** What is the total cost and activity type?

**Figure 20: Category that Best Describes the Task Item**

Category \*

- Communications 44.26.14
- Equipment Purchase
- Facility Purchase
- Mobility Management 11.7L.00
- Operations 30.09.01 (Operating Assistance)
- Planning 44.20.00
- Preventive Maintenance 11.7A.00
- Program Reserve 11.73.00
- Project Administration 11.79.00
- Signs/Shelters Purchase
- Vehicle Purchase 111-00
- Capital 117-00 Other Capital Items (Bus)

### 6.1.2 Expenditure Estimates

If this project is funded solely by STIF, enter the expenditure amounts in the STIF row and select the check box confirming that this is the only funding source (Figure 21). The first column in this section represents the first year of the STIF Plan period (FY 2024), and the second column represents the second year of the STIF Plan period (FY 2025).

**Figure 21: Expenditures by Fund Source and Fiscal Year**

### 6.1.2 Expenditure Estimates

#### Expenditures by Fund Source and Fiscal Year

Enter estimates of all expenditures for activities in this task denoting both fund source and fiscal year of expenditure. Do not select more than eight fund sources.

Fund Type *	FY 2024 †	FY 2025 ‡		Total
<input checked="" type="checkbox"/> STIF				\$0.00
<input checked="" type="checkbox"/> Federal				\$0.00
<input checked="" type="checkbox"/> Other State				\$0.00
<input checked="" type="checkbox"/> Local				\$0.00
<input checked="" type="checkbox"/> Other Funds				\$0.00
<input checked="" type="checkbox"/> Prior Biennia STIF Funds				\$0.00
<input checked="" type="checkbox"/> Prior Biennia Interest Accrued				\$0.00
<input checked="" type="checkbox"/> Prior Biennia Program Reserve				\$0.00
	\$0.00	\$0.00		\$0.00

By checking this box, I confirm that this project task is only funded by STIF.

If this project will be supported with funds outside of what is requested in this STIF Plan, enter the information about those funds in the boxes provided.

**Note:** If your STIF Plan covers two biennia as detailed in Section 5.1 Period Covered by STIF Plan, two additional columns will appear so that you can estimate expenditures for FY 2026 and FY 2027.

Here is a brief overview of the various funds mentioned in the budget table shown in Figure 21:

1. **STIF:** This value will include the funds requested from the STIF program to support the transportation project activity in this STIF Plan timeframe. You must ensure the total amount of funds entered in this category does not exceed your total allocation. The STIF Plan funding balance will be indicated in the STIF Plan Summary table.
2. **Federal:** This value will include the funds expected from any federal sources to fund the transportation project activity, such as Federal Transit Administration (FTA) Sections [5310](#), [5311](#), and [5307](#). You do not need to input the specific funding program, only the total amount of federal funding expected.

3. **Other State:** This value will include any other state funds expected to fund the transportation project activity.
4. **Local:** This value will include any funds generated or collected by the district, county, city, or other local/special district, to be applied to the transportation project activity. Examples include local tax revenues, service agreements with local agencies, and general funds. It could also include contributions by private organizations to support the project activity, either directly or through the sub-recipient. ODOT suggests you enter only funds you can reasonably assume will be available within the STIF Plan timeframe based on historical trends or commitments based on local budgeting and agreement processes.
5. **Other Funds:** This value will include all other fund sources that are budgeted to fund this project, such as private contributions.
6. **Prior Biennia STIF Funds:** This value will include unspent STIF Formula funds carried over from a previous STIF cycle. All unspent funds should be programmed into the 2023-25 STIF Plan<sup>2</sup>.
7. **Prior Biennia Interest Accrued:** This value will include interest accrued on unspent STIF Formula funds from a previous STIF cycle.
8. **Prior Biennia Program Reserve:** This value will include program reserve funds from a previous STIF cycle.

**Note:** The "+Add Fund Source" button is a technical error on the form and is not to be selected.

### 6.1.3 Outcome Measures

Qualified Entities are required to include anticipated outcomes for each STIF Plan project (Figure 22). Outcome measures are quantifiable, discrete ways to describe the benefits the provider expects to achieve after implementing each project over the STIF Plan period.

ODOT has identified a number of required outcome measures for certain capital, operations, and communications task categories. For other task categories, you must specify at least one outcome measure that best reflects the benefits of each task. Completing the minimum required outcomes will enable ODOT to compile and report STIF outcomes on a consistent, statewide basis. Qualified Entities should apply the FTA's National Transit Database (NTD) reporting definitions to the STIF Plan outcomes. The outcomes should fit into standard reporting procedures and methods that will be consistent with future reporting.

The outcome measures listed in this section are tied directly to the task categories chosen in Section 6.1.1 Project Scope. For example, the outcome measures associated with an operations project are shown in Figure 22.

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<sup>2</sup>For help estimating this amount, please contact Andrew O'Keefe, PTD Financial Manager, at [Andrew.S.Keefe@odot.oregon.gov](mailto:Andrew.S.Keefe@odot.oregon.gov).

**Figure 22: Outcome Measures Associated with an Operations Project**

**6.1.3 Outcome Measures**

**Minimum required measures for operations tasks**

Revenue Miles *	Revenue Hours *	Rides *
<input type="text"/>	<input type="text"/>	<input type="text"/>

Number of people with access to transit (within ½ mile of transit stop for fixed route) \*

Number of Low-Income Households with access to transit (within ½ mile of transit stop for fixed route) \*

Number of new shared stops with other transit providers (reducing fragmentation in transit services) \*

Is this project supporting student transportation? \*

Is this project supporting services for older adults and people with disabilities? \*

*Please select at least one outcome measure that best reflects the benefit of this task.*

The questions presented in Figure 22 are crucial for reporting purposes but would not necessarily apply to all task categories. Figure 23 provides another example, this time of the outcome measures required for a mobility management project.

**Figure 23: Outcome Measures Required for a Mobility Management Project**

**6.1.3 Outcome Measures**

*Please select at least one outcome measure that best reflects the benefit of this task.*

⊗ **Outcome Measure 1**

**Mobility Management**

Number of individuals that received transit training

Number of individuals that are served by a coordinated demand response call center

**All Project Types**

Other Measure

Marketing Materials Created ▼

Number of Units:

[+ Add Outcome Measure](#)

Some task categories don't require specific outcome measures as demonstrated in Figure 23. In those instances, please select at least one Outcome Measure from the drop-down list provided (Figure 24) and include the number of units, such as vehicles or signs to be purchased.



## Figure 24: Quantifiable Outcome Measures

### 6.1.3 Outcome Measures

*Please select at least one outcome measure that best reflects the benefit of this task.*

⊗ **Outcome Measure 1**

**All Project Types**

Other Measure

Number of Units:

+ Add Outcome Measure

When this step has been completed, determine if there are other tasks to add for this specific project. If there are other tasks for this specific project, press "+Add Task" and follow these same steps starting at Section 6.1.1 Project Scope.

If there are no other tasks for this specific project, continue on to Section 6.2 Allocation of STIF Funds by Project.

## 6.2 Allocation of STIF Funds by Project

You must specify the amount of Formula funds allocated to the eight STIF criteria listed in Figure 25, as outlined in OAR 732-042-0015. Identify what percentage of a STIF project budget is allocated to each of the criteria listed (e.g., providing transit to students in grades 9 through 12) by fiscal year.

**Figure 25: Percentage of STIF Budget Allocated to Each of the Criteria by Fiscal Year**

### 6.2 Allocation of STIF funds by project

Please identify what percentage of this STIF project budget is allocated to each of the criteria listed below by fiscal year.

Note: More information about requirements for criterion #7 can be found in [OAR 732-042-0015\(3\)\(j\)](#). More information about requirements for criterion #8 can be found in [OAR 732-042-0010\(1\)\(a\)](#).

#### STIF Criteria

1. Increased frequency of bus service to areas with a high percentage of Low-Income Households.
2. Expansion of bus routes and bus services to serve areas with a high percentage of Low-Income Households.
3. Fund the implementation of programs to reduce fares for public transportation in communities with a high percentage of Low-Income Households.
4. Procurement of low or no emission buses for use in areas with 200,000 or more.
5. The improvement in the frequency and reliability of service between communities inside and outside of the Qualified Entity's service area.
6. Coordination between Public Transportation Service Providers to reduce fragmentation in the provision of transportation services.
7. Implementation of programs to provide student transit service for students in grades 9-12.
8. Services for older adults and people with disabilities.

FY 2024 STIF Total	FY 2025 STIF Total
\$0.00	\$0.00

**Fund Allocation (Must not exceed 100% per criterion per fiscal year)**  
*If some criteria don't apply, fill in with zeros. Do not add or remove additional criterion.*

Criterion	FY 2024 *	FY 2025 *
⊗ Criterion 1	0.0%	0.0%
⊗ Criterion 2	0.0%	0.0%
⊗ Criterion 3	0.0%	0.0%
⊗ Criterion 4	0.0%	0.0%
⊗ Criterion 5	0.0%	0.0%
⊗ Criterion 6	0.0%	0.0%
⊗ Criterion 7	0.0%	0.0%
⊗ Criterion 8	0.0%	0.0%
	0.00%	0.00%

+ Add #

The total for each criterion in each fiscal year may not exceed 100 percent, but may be a percentage that ranges from 0 to 100 percent. A single project may have benefits that meet more than one criterion. In these instances, use your best professional judgment to specify which percentage of the funding meets each of the applicable criteria. The STIF Plan will auto-calculate the amount of funding allocated to each of the eight criteria based on the percentages you specify. This will enable ODOT to report the amount of funds allocated to each of the eight areas recognizing that many projects will meet multiple criteria.

The percentage entered for criterion seven, which pertains to funding for student transit services for students in grades 9 through 12, is used to calculate whether the Qualified Entity will meet the statutory requirement of spending at least one percent of Formula Fund funds received each year on transportation services for students in grades 9 through 12, if practicable (see definition of Student Transit Services in [OAR 732-040-005](#)).

The percentage entered for criterion eight, which pertains to funding for older adults and people with disabilities, is used to calculate whether the Qualified Entity will meet the statutory requirement of allocating funds received via the population-based formula to transit service for older adults and people with disabilities.

### **6.3 Oregon Public Transportation Plan Goals**

Qualified Entities are required to identify how each project is consistent with [Oregon Public Transportation Plan](#) (OPTP) goals and policies (Figure 26). The OPTP is an essential plan for supporting the development of the statewide public transportation system. The title for each OPTP goal is listed in this section next to a checkbox, and you must select at least one goal that applies to each specific STIF Plan project. To learn more about the intricacies and policies associated with each goal, consult page eight of the OPTP.

**Figure 26: Identify How Projects Are Consistent with OTP Goals and Policies****6.3 Oregon Public Transportation Plan Goals**

*Select at least one goal.*

For more information about these goals, please refer to page eight of the [Oregon Public Transportation Plan](#).

Select the OTP goals that apply to your STIF Plan Projects. \*

- Goal 1 Mobility: Public Transportation User Experience
- Goal 2: Accessibility and Connectivity
- Goal 3: Community Livability and Economic Vitality
- Goal 4: Equity
- Goal 5: Health
- Goal 6: Safety and Security
- Goal 7: Environmental Sustainability
- Goal 8: Land Use
- Goal 9: Funding and Strategic Investment
- Goal 10: Communication, Collaboration, and Coordination

**6.4 Project Summary**

The data in this section are auto-calculated based on responses entered about a specific project in previous sections (Figure 27).

**Figure 27: Auto-Calculated Project Summary**

<b>6.4 Project Summary</b>	
Project Name	
STIF Project Grand Total	
\$0.00	
<i>Includes FY 21-23 Unspent Funds, Interest Accrued, Program Reserve</i>	
FY 2024 STIF Project Total	FY 2025 STIF Project Total
\$0.00	\$0.00
<i>Includes FY 21-23 Unspent Funds, Interest Accrued, Program Reserve</i>	<i>Includes FY 21-23 Unspent Funds, Interest Accrued, Program Reserve</i>
<b><u>Funds Supporting Student Transportation</u></b>	
FY 2024 percent of STIF Funds supporting student transportation	FY 2025 percent of STIF Funds supporting student transportation
<b><u>Funds Supporting Older and Disabled Persons Transportation</u></b>	
FY 2024 percent of STIF Funds supporting older and disabled persons transportation	FY 2025 percent of STIF Funds supporting student transportation
<b><u>Funds from Previous Biennia</u></b>	
FY 2024 STIF Funds From Previous Cycle	FY 2025 STIF Funds From Previous Cycle
\$0.00	\$0.00
<i>Includes FY 21-23 Unspent Funds, Interest Accrued, Program Reserve</i>	<i>Includes FY 21-23 Unspent Funds, Interest Accrued, Program Reserve</i>

In the example provided in Figure 27:

- Project Name is pulled from Section 6.1 Project Detail Entry.
- STIF Project Grand Total is based on Section 6.1.2 Expenditure Estimates.
- FY 2024 STIF Project Total is based on Section 6.1.2 Expenditure Estimates.
- FY 2025 STIF Project Total is based on Section 6.1.2 Expenditure Estimates.
- FY 2024 percent of STIF Funds supporting student transportation is based on Section 6.2 Allocation of STIF Funds by Project.
- FY 2025 percent of STIF Funds supporting student transportation is based on Section 6.2 Allocation of STIF Funds by Project.

**Note:** All of the steps from Section 6.1 Project Detail Entry to Section 6.4 Project Summary are for one project only. If there is only one project total on the STIF Plan, continue to Section 7 STIF Plan Summary. If there are additional projects to be added, select the "+Add Project" button and repeat these instructions starting at Section 6.1 Project Detail Entry.

## 7. STIF Plan Summary

The data in this section will auto-calculate based on the data that have been entered for each project (Figure 28).

**Figure 28: Auto-Calculated STIF Plan Summary**

<b>7. STIF Plan Summary</b>	
STIF Plan Total \$0.00	Amount Carried Forward \$0.00
FY 2024 Total STIF Funds \$0.00	FY 2025 Total STIF Funds \$0.00
FY 2024 Student STIF Funds \$0.00	FY 2025 Student STIF Funds \$0.00
FY 2024 Percent of STIF Funds supporting student transportation	FY 2025 Percent of STIF Funds supporting student transportation
FY 2024 Older and Disabled Persons STIF Funds \$0.00	FY 2025 Older and Disabled Persons STIF Funds \$0.00
FY 2024 Total STIF Funds From Previous Cycle \$0.00 <i>Includes FY 21-23 Unspent Funds, Interest Accrued, Program Reserve</i>	FY 2025 Total STIF From Previous Cycle \$0.00 <i>Includes FY 21-23 Unspent Funds, Interest Accrued, Program Reserve</i>
Please explain why your allocation of STIF Funds to support student transportation is less than 1%. *	
<input type="text"/>	
Limit 500 Characters	

This section also summarizes the percentage of STIF Formula funds that will be dedicated to transportation services for students in grades 9 through 12 each year of the STIF Plan. If less than one percent of STIF Plan Formula funds are proposed in any single fiscal year, a text box will appear requiring you to explain why it isn't practicable to dedicate at least one percent of Formula Fund money for this purpose each fiscal year. Consider the definition of Student Transit Services in OAR 732-040-005 when writing an explanation.

This STIF Plan serves as a legally binding agreement between the Qualified Entity and the State of Oregon, acting by and through its Department of Transportation (Figure 29).

## Figure 29: STIF Plan Serves as a Legally Binding Agreement

**Effective Date**

This STIF Plan shall become effective as of the date it is approved by the Oregon Transportation Commission and it shall terminate as of the end date specified in Section 5 of the approved STIF Plan.

**Signature**

This STIF Plan serves as a legally binding agreement between the Qualified Entity and the State of Oregon, acting by and through its Department of Transportation.

Download the signature page here: [STIF Plan Signature Page](#)

Upload signature page here. \*

or drag files here.

Limit 100 MB

The person who signs the STIF Plan is certifying that they are authorized to execute this STIF Plan on behalf of their Qualified Entity and at the direction of their Governing Body. They also are legally binding their Qualified Entity and acknowledging and representing on behalf of their Qualified Entity each of the following:

- The Qualified Entity, through its agents, officers, or employees responsible to administer the STIF Plan and oversee completion of the projects included in the STIF Plan, has read and understands [ORS 184.751 through ORS 184.766](#) and OAR chapter 732, divisions 40 and 42.
- The Qualified Entity agrees to be bound by ORS 184.751 through ORS 184.766 and OAR chapter 732, divisions 40 and 42 and any other laws applicable to STIF Formula Fund program administration and to the completion of the projects described in this STIF Plan.
- The STIF Plan is complete and includes all of the required documentation and information.
- The STIF Plan does not contain and is not based on any false or fraudulent information.
- The STIF Plan does not contain any statement or representation that is untrue in whole or part.
- The STIF Plan does not omit information that could have a material effect on the value, validity, or authenticity of the STIF Formula Fund distributions made to the Qualified Entity.
- The Qualified Entity agrees to deliver the projects described in this STIF Plan within the identified timelines.
- The Qualified Entity understands that it may request STIF Formula Fund distributions from ODOT after the Oregon Transportation Commission (OTC) has approved the STIF Plan but may not make a request prior to July 1, 2023.
- Payments to the Qualified Entity are conditioned on the Qualified Entity satisfying all terms and conditions of this agreement.



- The Qualified Entity is required to repay, in full, any distributions paid to the Qualified Entity if the Oregon Transportation Commission determines that the recipient has failed to meet any terms or conditions of this agreement.

Select the link next to “Download the signature page here” and have an authorized person complete and sign the form (Figure 30). Upload the signed signature page using the “Upload” button.

### Figure 30: Download and Upload the Signature Page

**Signature**

This STIF Plan serves as a legally binding agreement between the Qualified Entity and the State of Oregon, acting by and through its Department of Transportation.

Download the signature page here:

[STIF Plan Signature Page](#)

Upload signature page here. \*

or drag files here.

Limit 100 MB

When the STIF Plan has been completed, press the “Save” button one last time before selecting the “Submit STIF Plan” button at the bottom of the form (Figure 31).

### Figure 31: Saving and Submitting the STIF Plan

Submit STIF Plan

Save