



# COORDINATED PUBLIC TRANSIT HUMAN SERVICES TRANSPORTATION PLAN

SEPTEMBER 2019



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## **Introduction**

This document serves as the Coordinated Public Transit – Human Services Transportation Plan (“Coordinated Plan”) for Marion and Polk counties. Salem Area Mass Transit District (SAMTD), dba Cherriots, acts as the Special Transportation Fund (STF) Agency responsible for the administration and coordination of the STF program within Marion and Polk counties. The Coordinated Plan is a guiding document for making recommendations about grant distributions funded by the State of Oregon’s STF and federal Section 5310 (§5310) funds, which fund improvements in transportation programs and services for seniors and people with disabilities. This document builds on the 2007 Specialized Transportation Plan for Marion and Polk counties and the subsequent 2009 and 2016 Coordinated Plans. The 2007 Specialized Transportation Plan examined the ways special needs transportation services are delivered in the two counties, and recommended improvements to better coordinate services. The 2009 Coordinated Plan updated the Specialized Transportation Plan to meet federal and state planning guidelines.

Since the development of the 2016 Coordinated Plan, Cherriots has made advances in public transportation services and tested new programs such as the West Salem Connector. Although this flexible transit service did not prove to be the best solution for West Salem, this type of service may be considered in the future.

As the population of seniors and people with disabilities continues to grow, the region will continue to focus on developing an innovative continuum of transportation services, one that takes in to account people’s abilities throughout life. New sources of funding will be needed and coordination of services and service providers will be essential to providing the most access to transportation for seniors and people with disabilities.

### **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

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percent share of the population today to a 17.9 percent share. According to the 2010 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.

## **The Cherriots 2019 Coordinated Plan update**

The State of Oregon developed a State Special Transportation Fund (STF) in the mid-1980s to fund transportation projects serving seniors and people with disabilities. It designated transit districts, counties, Native American tribes, and transportation districts as “STF Agencies” to conduct a local public process which would solicit, review, and prioritize projects for funding, and to certify that projects were derived from a Coordinated Plan. Cherriots serves as the STF Agency for Marion and Polk counties.

Oregon Administrative Rule 732-005-0081 requires that STF Agencies prepare a plan to guide the investment of STF monies to maximize the benefit to seniors and people with disabilities within their jurisdictions. ODOT has delegated authority to Cherriots as the governing body to determine how STF and 5310 dollars are spent in the rural and urban areas of Marion and Polk counties. This Coordinated Plan is used to prioritize funding for the FTA-direct Section 5310 grant, the ODOT pass-through Section 5310 grant, and any STF grant funds; and to coordinate transportation services with human services organizations that receive funding from the Oregon Department of Human Services (DHS).

In addition to the Section 5310 funds received from ODOT, Cherriots is the designated, direct recipient of FTA Section 5310 funds. The Cherriots 5310 Program Management Plan (PMP) describes the policies and procedures for administering an Enhanced Mobility of Seniors and People with Disabilities program. The PMP articulates a vision for Cherriots future with programs that focus on the maintenance of critical services, while strategically developing opportunities for the growth of services and facilities for the years to come. In this regard, the PMP aligns with the Coordinated Plan by identifying the growing need for public transportation

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

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

The 2019 update to the Coordinated Plan builds on the foundation of the 2016 Coordinated Plan, which captured Cherriots ability to provide transportation services that consider people's functional abilities as they transition through various stages of age and ability. Strategies of particular interest for this update focused on maintaining existing services, expanding service, coordinating with social services providers to increase system efficiencies, and working to implement strategies that increase access to lifeline services. It is recommended to use Cherriots existing decision-making and planning functions to help implement the strategies laid out in the Coordinated Plan.

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

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



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## **Chapter 1: Background and methodology**

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

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

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

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group of services and geographies. *A summary of the stakeholder workshop is in **Appendix A**. A list of comments made by participants is in **Appendix B**.*

The purpose of the 2019 update is to bring the document up to current external branding standards and update the revision schedule to align with the Cheriots Section 5310 Program Management Plan's update schedule, which is every three to four years.

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

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

## **1.1 Overview of relevant grant programs**

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

## **1.2 Section 5310 federal funds**

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

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investment beyond the Americans with Disabilities Act (ADA) complementary paratransit services.

### ***Program History***

The Section 5310 program was established in 1975 as a discretionary capital assistance program, and the program awarded grants to private non-profit organizations to serve the needs of seniors and persons with disabilities. Many of the non-profit agencies used the vehicles primarily for transportation of their own clients. The Section 5310 program changed to a formula program under the Intermodal Surface Transportation Efficiency Act of 1991 (ISTEA). ISTEA encouraged the coordination of human service transportation, and FTA guidance required coordination of the program with other federal human services transportation programs.

The Transportation Equity Act for the 21st Century (TEA-21) enacted in 1998, reauthorized the Section 5310 program. TEA-21 increased the authorized funding levels, but made no significant program changes. In 2005, Congress enacted the Safe, Accountable, Flexible Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU), and authorized the New Freedom program to support new public transportation services and public transportation alternatives beyond those required by the ADA. SAFETEA-LU also introduced the requirement that Section 5310 and New Freedom projects must be derived from a locally developed, coordinated public transit human services transportation plan.

Congress enacted the MAP-21 Act on July 6, 2012. MAP-21 repealed the New Freedom program and merged the New Freedom program into the Section 5310 program. As a result of this merger, activities under the New Freedom program are now eligible under Section 5310, and consistent with the New Freedom program, funds are apportioned among the large urbanized areas, small urbanized areas, and rural areas, instead of only to states, as the law previously provided. MAP-21 required that a minimum of 55 percent of the Section 5310 funding be expended on Section 5310 Traditional projects.

On December 4, 2015, President Obama signed the Fixing America's Surface Transportation (FAST) Act, reauthorizing surface transportation programs, including the Section 5310 program, through Fiscal Year 2020, but made no significant program changes.

Traditional Section 5310 project examples include:

- Purchasing buses and vans for providing service to seniors and/or people with disabilities

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- Wheelchair lifts, ramps, and securement devices for such vehicles
  - Transit-related information technology systems, including scheduling/routing/one-call systems
  - Mobility management programs
  - Acquisition of transportation services for seniors and people with disabilities under a contract, lease, or other arrangement

Nontraditional Section 5310 project examples include:

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

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

### **1.3 State Special Transportation Funds (STF)**

The STF Program provides a flexible, coordinated, reliable, and continuing source of revenue in support of transportation services for seniors and people with disabilities of any age. The Oregon Legislature intended that STF funds be used to provide transportation services needed to access health, education, work, social, and recreational opportunities so that seniors and people with disabilities may live as independently and productively as possible. The funds may be used for any purpose directly related to transportation services, including transit operations, capital equipment, planning, travel training, and other transit-related purposes.

#### ***Program History***

The STF program was created in 1985 by the Oregon Legislature. Funding is allocated by the Oregon Legislature every two years to 42 jurisdictions throughout the state including Cherriots. The STF program is funded by cigarette tax revenue,

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excess revenue earned from sales of photo ID Cards, and other funds from the Oregon Department of Transportation.

## **1.4 Cherriots role as the Special Transportation Fund Agency**

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

Cherriots is the federally designated agency to disburse FTA’s 49 U.S.C. 5310 (§5310) Enhanced Mobility of Seniors and Individuals with Disabilities funds within the Salem-Keizer urban growth boundary. Cherriots administers the §5310 program and coordinates with other providers in the region to ensure coordinated, effective provision of service that meets federal and state requirements. Cherriots also receives funds through ODOT’s §5310 program for urban and rural projects in Marion and Polk counties. Cherriots has chosen many components of the STF grant selection and award process for the FTA-direct Section 5310 grant process.

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

## **1.5 Cherriots Board of Directors**

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

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## 1.6 Grant application solicitation, review, and approval process

This section outlines the process SAMTD employs to solicit, review, and approve the applications for STF and Section 5310(ODOT) grant funds. The process for Section 5310(FTA) funds is outlined in the SAMTD Section 5310 Program Management Plan (PMP).

Originating from the Oregon Department of Transportation (ODOT), these programs fund transportation services for seniors and individuals with disabilities with the geographic constraint that the projects must be within Marion and Polk counties.

ODOT solicits applications for STF and 5310(ODOT) grants once every two years. In general, applications are available in November or December of even numbered years (2018, 2020, etc.). Cherriots, as the STF Agency for Marion and Polk counties, applies to the ODOT Rail and Public Transit Division (RPTD) on behalf of the subrecipients for approval of these grant funds.

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

Once the funding recommendation is approved by the Cherriots Board of Directors, Cherriots staff submits the approved applications to ODOT RPTD for final approval. Once approved, staff will draft agreements with recipients and send a courtesy copy to ODOT RPTD.

## Chapter 2: Demographic profile

This chapter provides an overview of Marion and Polk counties based on data from the 2010 United States Census and the 2010-2014 American Community Survey five-year estimate dataset. This chapter of the Coordinated Plan contains maps, created using Geographic Information System (GIS) technology, that illustrate the location and density of people aged 60 years and older, people with disabilities, and



people with low income within Marion and Polk counties. These maps visually depict geographic areas with concentrations of the population groups that face particular mobility concerns, and who are the subject of this plan. Cherriots generally uses the 60 years and older data to determine eligibility for reduced fares and whether they can ride the Cherriots Shop and Ride, for example. Cherriots definition of a senior citizen for eligibility for reduced fares is 60 years and older, the federal definition is 65 years and over, specific to the 5310 grant program. Because the Coordinated Plan is used for both Oregon and federal grants, both age groups need to be documented. *Information on seniors 65 years and older is in Appendix C.*

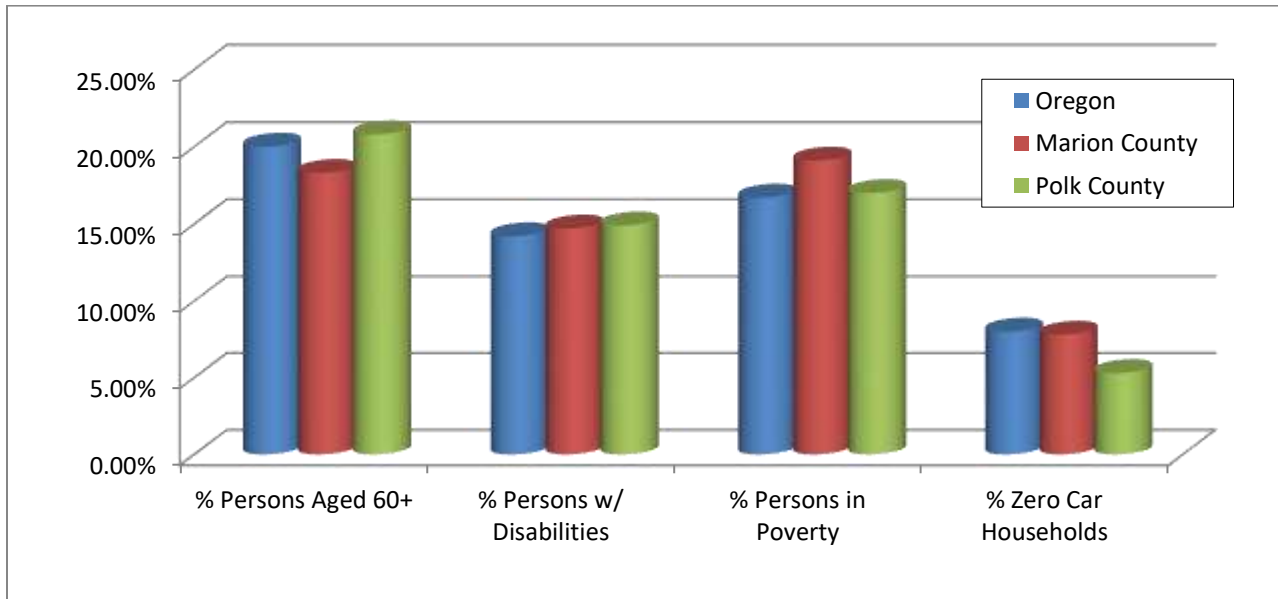
**Table 1** (and **Figure 1** on the following page) provides a “snapshot” of three population groups of concern for the Coordinated Plan: older adults, people with disabilities, and people with low income (as defined by the federal definition).

**Table 1.** Population characteristics

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

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

**Figure 1.** Population characteristics



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



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



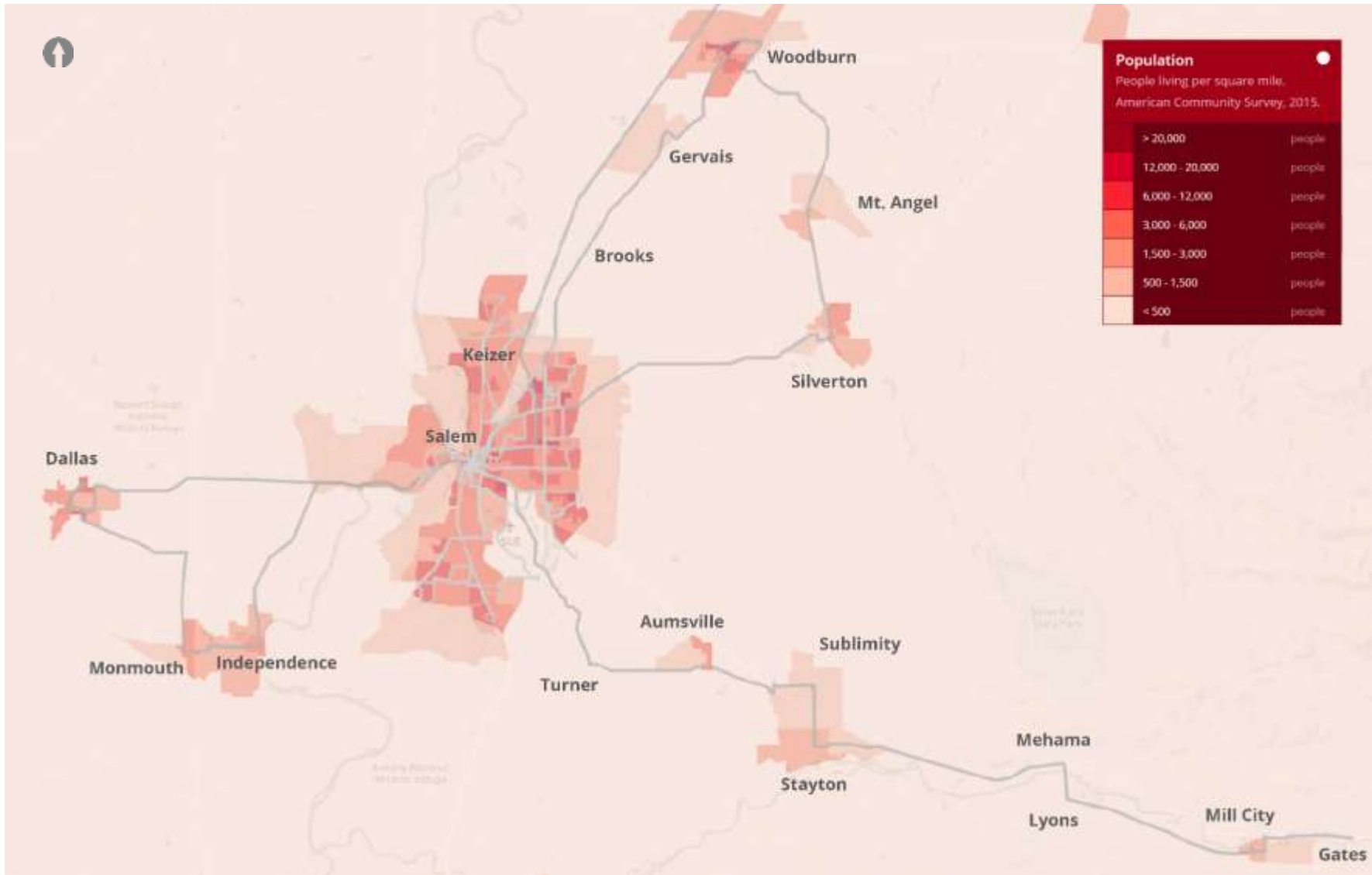
**Figure 2.**

**Table 2.** Population by city

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

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

**Figure 2.** Population density in Marion and Polk counties



**Source:** American Community Survey 2015 via Remix

## 2.1 Older adults

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

**Table 3.** Adults aged 60+ by city

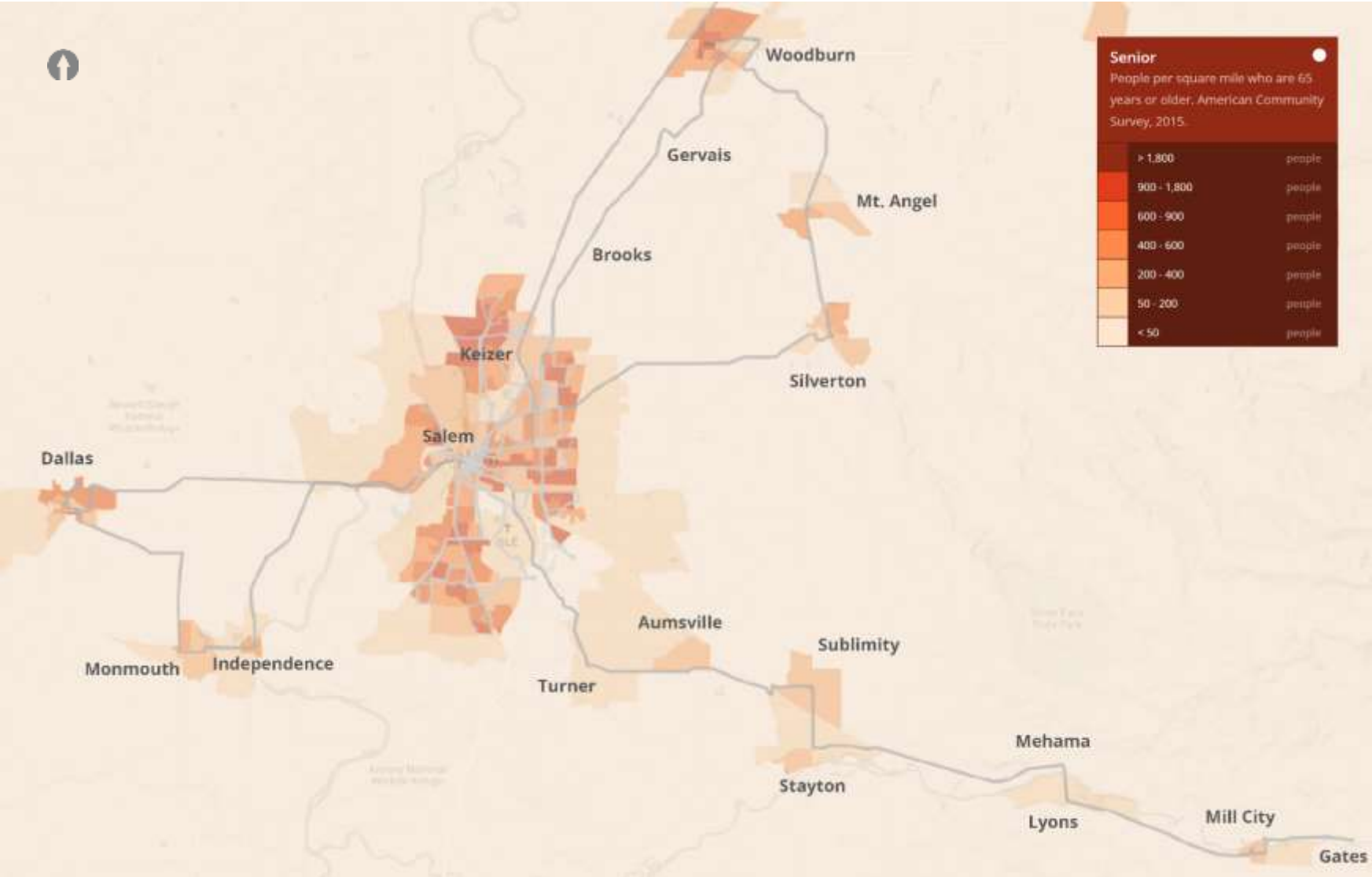
City	2010 Population Age 60+ <sup>1</sup>	% Age 60+
Salem	26,480	17.2%
Keizer	6,880	<b>18.9%</b>
Woodburn	4,730	<b>19.6%</b>
Dallas	3,650	<b>25.0%</b>
Hayesville <sup>2</sup>	3,090	15.5%
Four Corners <sup>2</sup>	2,560	16.1%
Silverton	1,830	<b>20.0%</b>
Stayton	1,400	18.3%
Monmouth	1,220	12.8%
Independence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

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

(1) U.S. Census, 2010, Table DP-1. (2) This unincorporated area of Marion County lies within the Salem-Keizer Urban Growth Boundary. (3) This city is not entirely within Marion and Polk counties. Cities where the share of people aged 60 or older is greater than the counties as a whole are shown in bold.



**Figure 3.** Population density of people aged 60 years and older



**Source:** American Community Survey 2015 via Remix

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## 2.2 People with disabilities

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

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

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

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

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

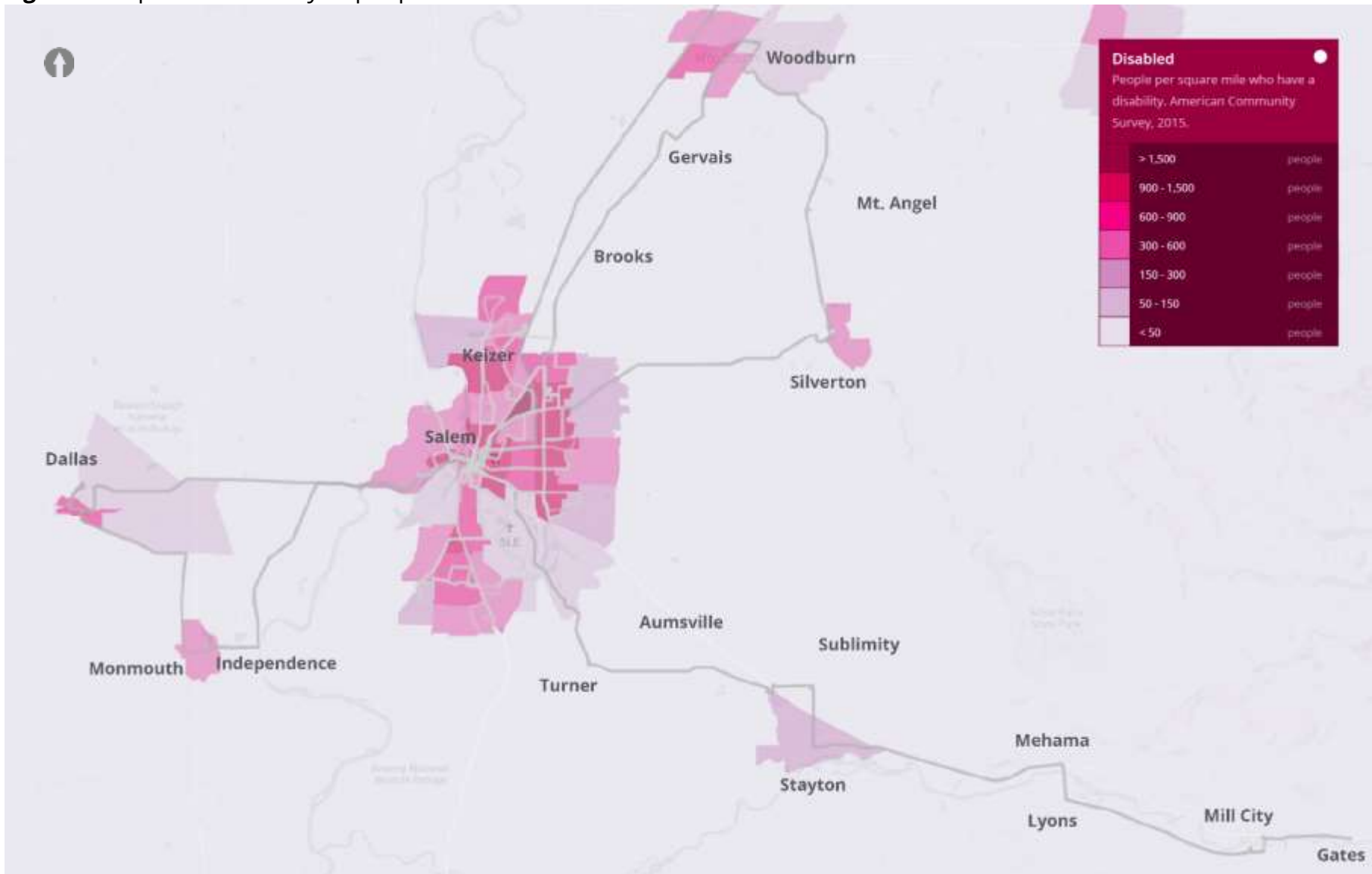
**Figure 4** on the following page shows a map of population density of people with disabilities in Marion and Polk counties. **Table 4** lists the percentages of the population with a disability for communities in each county.

**Table 4.** People with disabilities by city

City	Population with Disabilities <sup>1</sup>	% People w/ Disabilities	City	Population with Disabilities <sup>1</sup>	% People w/ Disabilities
Salem	22,300	14.6%	Willamina <sup>3</sup>	430	24.5%
Keizer	5,650	15.4%	Turner	390	17.3%
Woodburn	3,070	12.8%	Hubbard	360	11.3%
Hayesville <sup>2</sup>	2,840	15.3%	Mill City <sup>3</sup>	340	20.4%
Dallas	2,720	18.6%	Gervais	290	11.6%
Four Corners <sup>2</sup>	2,590	15.1%	Falls City	290	32.2%
Silverton	1,320	14.2%	Gates	150	25.2%
Stayton	1,200	15.6%	Donald	80	7.8%
Monmouth	1,100	11.3%	Aurora	70	7.1%
Independence	1,010	11.7%	Idanha	50	32.4%
Aumsville	730	19.7%	Scotts Mills	40	8.3%
Mount Angel	660	20.0%	Detroit	40	27.2%
Sublimity	540	20.6%	St. Paul	30	9.1%
Jefferson	540	17.0%			

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

**Figure 4.** Population density of people with disabilities



**Source:** American Community Survey 2015 via Remix

## 2.3 Income status

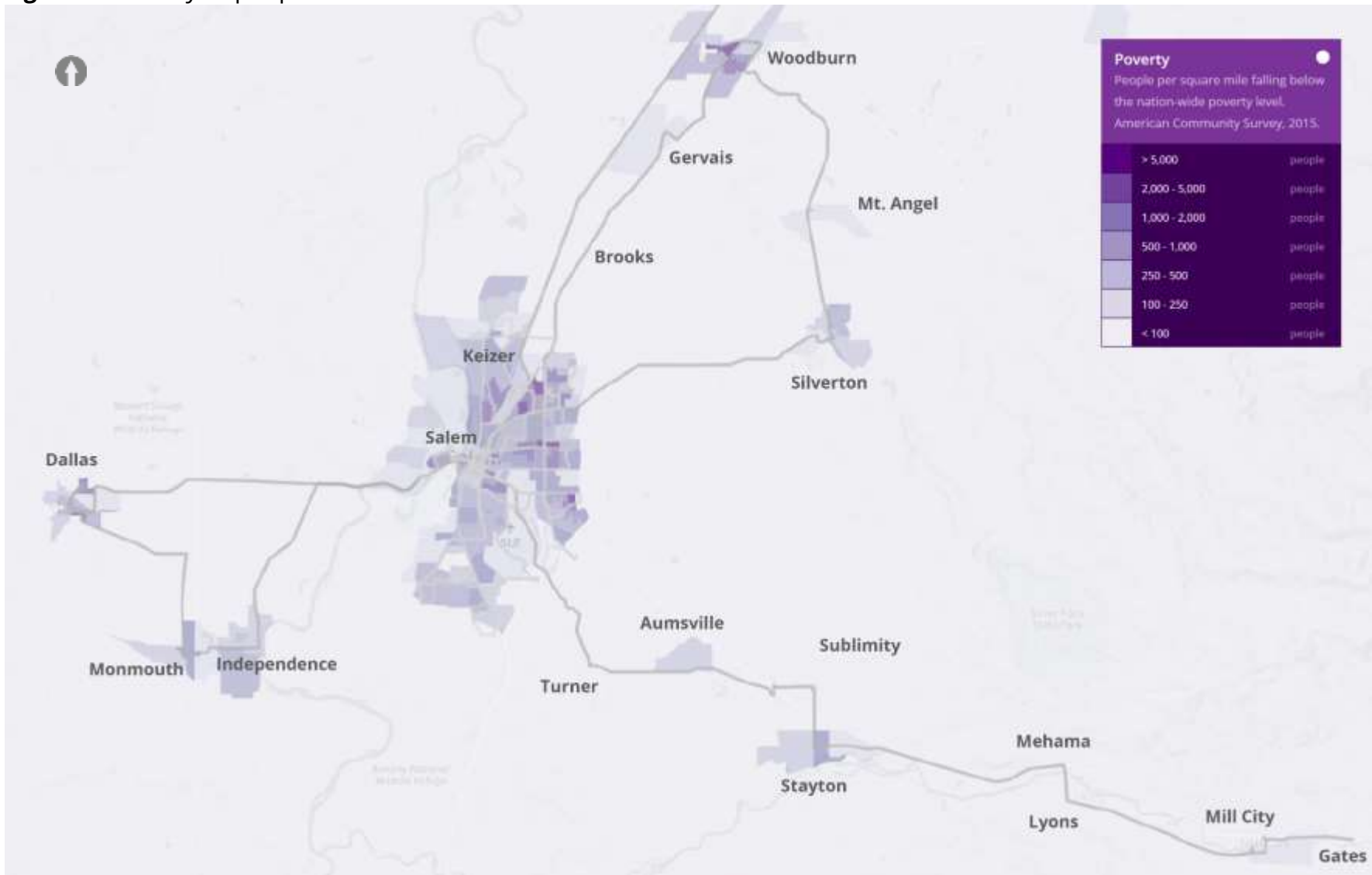
In Marion County, an average of 19.1 percent of residents (compared with a statewide average of 16.7 percent) live below the applicable federal poverty threshold, which for a family of four is defined as a household income under \$23,850. In Polk County, 17.0 percent of residents live below the poverty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

**Table 5.** People with low income by city

City <sup>5</sup>	# People with Low Income <sup>1,2</sup>	% People with Low Income <sup>1,2</sup>	City <sup>5</sup>	# Low-Income People <sup>1,2</sup>	% Low-Income People <sup>1,2</sup>
Salem	26,589	17.2%	Gervais	411	16.2%
Woodburn	<b>6,472</b>	<b>26.3%</b>	<b>Mill City<sup>4</sup></b>	<b>402</b>	<b>22.0%</b>
Keizer	5,782	15.6%	Mt. Angel	386	11.6%
Hayesville <sup>3</sup>	4,067	19.8%	Sublimity	299	10.8%
Four Corners <sup>3</sup>	3,197	20.2%	Turner	273	12.1%
Monmouth	2,935	33.5%	<b>Falls City</b>	<b>196</b>	<b>21.3%</b>
Dallas	2,302	15.4%	Donald	102	8.8%
Independence	2,006	22.4%	Aurora	91	7.1%
Stayton	1,541	19.7%	Gates	58	13.0%
Silverton	1,107	11.6%	Scotts Mills	52	12.5%
Aumsville	<b>687</b>	<b>17.7%</b>	<b>Idanha</b>	<b>31</b>	<b>18.8%</b>
Jefferson	671	21.1%	St. Paul	22	5.7%
Hubbard	444	13.6%	Detroit	9	10.1%
<b>Willamina<sup>4</sup></b>	<b>434</b>	<b>22.9%</b>			

(1) As percent of people for which poverty status is determined, Table S1701. (2) ACS 2012-2016 estimate. (3) This unincorporated area of Marion County lies within the Salem-Keizer Urban Growth Boundary. (4) This city is not entirely within Marion and Polk counties. (5) Cities where the share of low-income people is greater than the counties as a whole are shown in bold (average percentage for Marion County is 17.2% and for Polk County 15.5%).

**Figure 5.** Density of people with low income



**Source:** American Community Survey 2015 via Remix



## 2.4 Vehicle ownership

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

**Table 6.** Number of zero-vehicles households by city

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

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

## 2.5 Population trends

Between 2010 and 2025, the overall population growth in Marion County (21 percent) and Polk County (28 percent) is expected to outpace population growth for the state as a whole (18 percent). The data is shown in Error! Not a valid bookmark self-reference., from population estimates provided by the Oregon Department of Administrative Services' Office of Economic Analysis. Between 2010 and 2025, the rate of population increase for adults 65 years and older in Marion County (65

percent) and Polk County (68 percent) is expected to be slower than the state as a whole (73 percent).

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

**Table 7.** Population growth forecasts

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

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

## 2.6 Employment

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

**Table 8** provides a “snapshot” of employment and median household income in Marion and Polk counties and a comparison with the state overall. Both counties have a labor force that is similar Oregon as a whole in terms of the percentage of the overall population that is eligible to participate in work. The unemployment rate (as a percentage of the overall labor force) is about one-half percentage point higher in the Salem Metropolitan Statistical Area than in the state of Oregon as a whole. The median household income in Marion County is approximately 6 percent

lower than the statewide median, and in Polk County, the median household income is approximately 2.5 percent higher.

**Table 8.** Employment characteristics

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

(1) ACS 2010-2014 estimate. (2) Table DP03. (3) Data from the State of Oregon Employment Department Labor Trends newsletter from February 2016. Unemployment data is for December 2015.

<https://www.qualityinfo.org/documents/10182/89830/Salem+Local+Labor+Trends?version=1.17>

(4) Data is for the Salem Metropolitan Statistical Area. (5) Table S0801.

## 2.7 Major employers

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

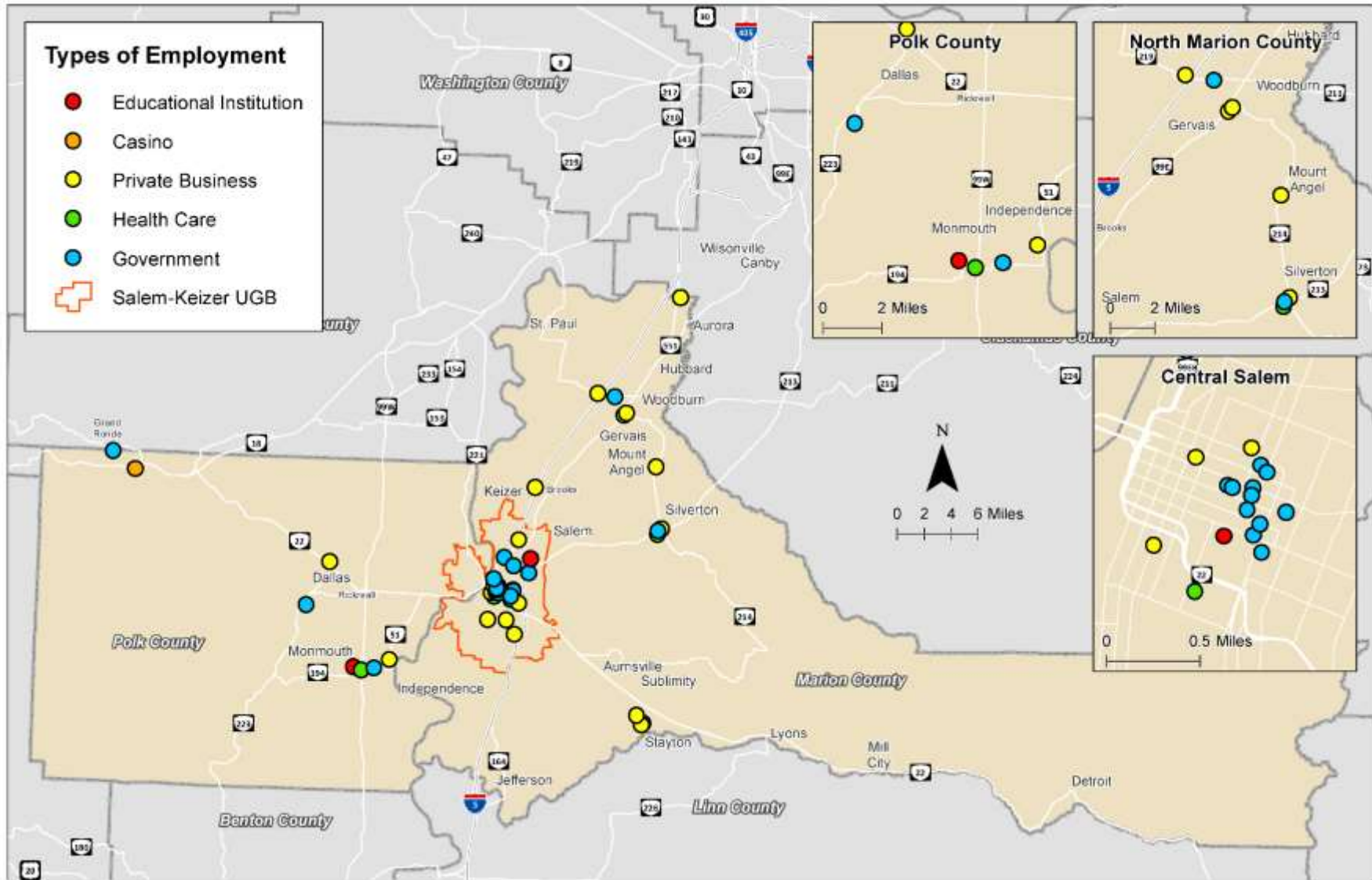
According to data from the Oregon Employment Department published as part of the City of Salem’s *2014-15 Comprehensive Annual Financial Report*, Oregon provides more than 21,000 jobs in the Salem metropolitan area. The federal government, Marion County, and the City of Salem combined, provide about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

**Figure 6** shows the location of some of the largest employers (with at least 450 employees) by business type (government, educational institutions, health care,

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private business, and casino) in Marion and Polk counties. Some of the largest employers outside Salem include NORPAC Foods in Stayton, Spirit Mountain Casino in Grand Ronde, Western Oregon University in Monmouth, Legacy Silverton Medical Center, the Woodburn School District, Mid Valley Health Care in Lebanon, Columbia Helicopters in Aurora, and BrucePac (meat packing company) in Silverton and Woodburn.

**Figure 6.** Major places of employment



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## Chapter 3: Overview of existing public transportation services

This chapter covers the range of transit services in Marion and Polk counties that currently receive either STF or §5310 grant dollars that pay for all or a portion of the service. *A list and description of social service agencies that provide transportation services not funded by STF or §5310 and a description of surrounding regional transit providers not receiving STF or §5310 dollars through SAMTD is in **Appendix D**.*

### **3.1 Salem Area Mass Transit District**

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

- Cherriots Local bus service within Salem and Keizer. A map of the Cherriots network is shown in *Youth fares* will change beginning June 3, 2019.

The Cherriots Local system map is provided in **Figure 7**. Frequent service routes are shown in red and standard service routes in blue.

- *Figure 7.*
- Cherriots Regional bus service to rural communities in Marion and Polk counties and a small portion of Linn County, and connects riders to Cherriots Local buses in Salem. Regional service also includes an express service to Wilsonville.
- Cherriots LIFT is the complementary paratransit service required by the Americans with Disabilities Act (ADA); an origin-to-destination transportation service for people whose disability prevents them from being able to use Cherriots Local buses.
- The Cherriots Shop and Ride is a shopper shuttle and dial-a-ride service for seniors aged 60 and greater and people with disabilities, which operates within the Salem-Keizer Urban Growth Boundary (UGB).
- The Cherriots call center (formerly the TripLink Call Center) takes reservations for the Polk County Flex, Cherriots LIFT, and Cherriots Shop and Ride. The call center no longer contracts with the Oregon Health Authority to book trips for Non-Emergent Medical Transportation (NEMT). This is now provided by LogistiCare through the region's Coordinated Care Organization (CCO) to

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provide transportation to eligible Oregon Health Plan (OHP) clients traveling to covered medical services.

- Travel training and mobility management services, which help seniors, people with disabilities, and others know how to use public transit.
- The Cherriots Trip Choice program is a one-stop-shop for transportation options information. Free services include ride-matching, emergency ride home and transit, cycling, walking and park and ride lot information. Assistance with developing employer and transit pass programs is also available.

### **3.2 Cherriots Local**

Operating Monday through Friday from 6 a.m. to 9 p.m., Cherriots Local buses provide comfortable and convenient service in the Salem-Keizer area. Cherriots Local provides approximately 3.4 million annual rides. With the promise of Statewide Transportation Improvement Fund (STIF) grant program, service is expected to expand in September 2019 with the addition of Saturdays and extended weekday evenings (until 11:00 pm). Sundays and some holidays would be added in May 2020.

There are 21 Cherriots Local routes divided into two service types: corridor routes and neighborhood shuttles. Corridor routes are ridership routes that are more productive and have a goal of at least 20 boardings per revenue hour. They generally run every 15 minutes during the day and every 30 minutes in the evenings. Neighborhood shuttles are coverage routes and have a ridership goal of 20 boardings per revenue hour. These run every 30 or 60 minutes throughout the day and every 60 minutes in the evenings.

Cherriots Local weekday service can be broken into two levels of service: frequent (every 15 minutes) and standard (every 30 to 60 minutes). Service is designed to be consistent for most of the day to provide robust midday service and to help riders quickly learn how often their bus arrives. At a minimum, local buses must be scheduled to arrive once an hour to provide a base level of service.

Service is provided primarily from four transit centers. The Downtown Transit Center, located at Courthouse Square is the main transfer location. The second largest transit center is the Keizer Transit Center, which is a hub for buses serving the north end of the Cherriots Local service area. The smallest transit center is the West Salem Transit Center where Routes 26 and 27 connect with Route 17, which runs frequent service to the Downtown Transit Center. Yamhill County Transit Area buses also make connections with Cherriots service at the West Salem Transit Center. Chemeketa Community College is also considered transfer location due to

the number of buses (five Cherriots Local and two Cherriots Regional routes) coming together at that location.

Cherriots Local fares will be changing effective June 3, 2019. A new youth fare will be offered at that time for Cherriots Local and Regional riders (excluding Route 1X). This is in response to a requirement of the Statewide Transportation Improvement Fund (STIF) grant program, which states that at least 1 percent of the funds be used toward improving transportation for students in grades 9 through 12. The new fares are displayed in Error! Not a valid bookmark self-reference.. The Reduced fare is for seniors ages 60 and older, people with disabilities, and Medicare card holders. Youth fares are for children 6-18 years of age.

**Table 9.** Cherriots Local fares

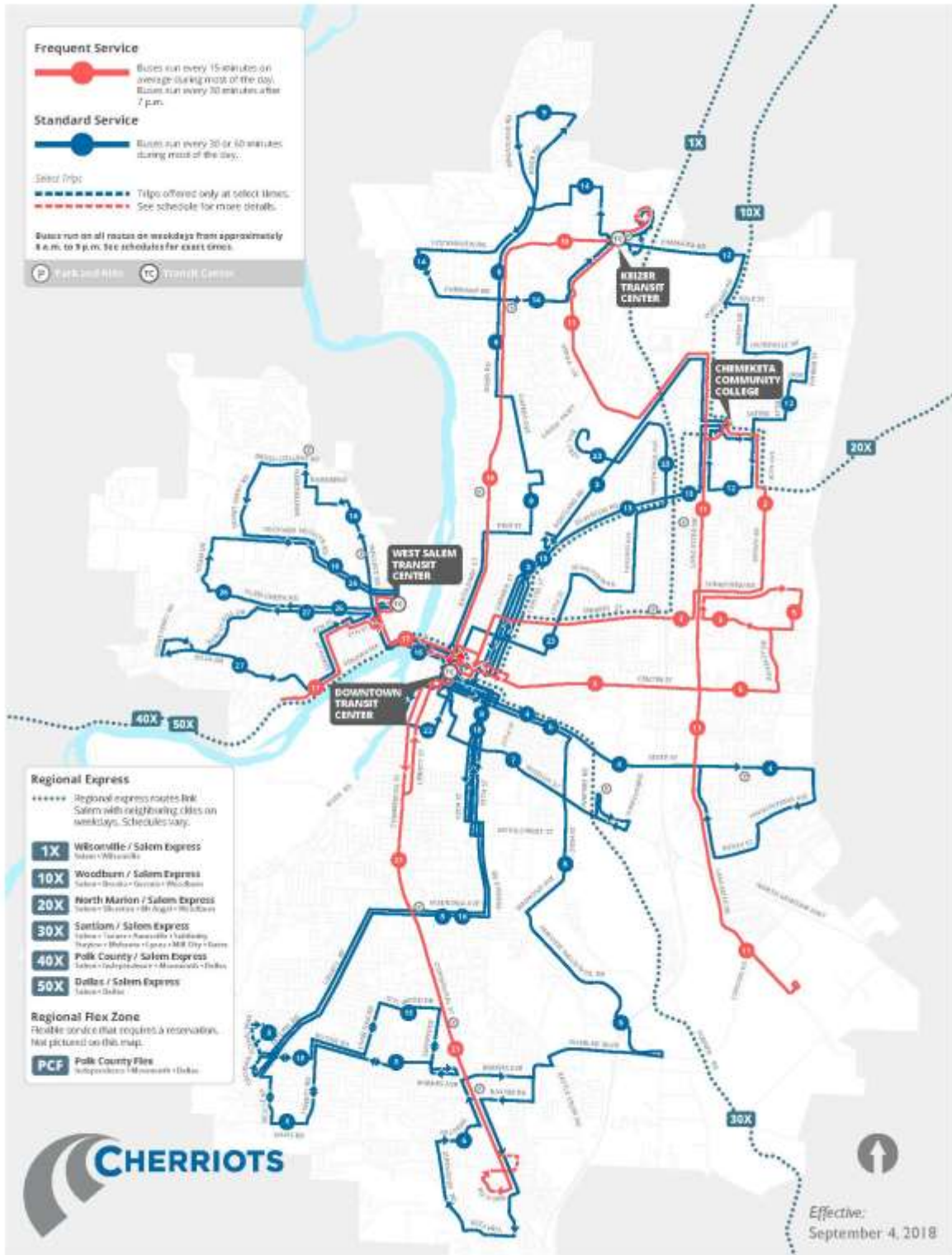
	One-Way	Day Pass	30-day Pass	Annual Pass
Adult (19-59)	\$1.60	\$3.25	\$45.00	\$540.00
Reduced (60+, disabled, etc.)	\$0.80	\$1.50	\$22.50	\$270.00
Youth (6-18) <sup>1</sup>	\$0.50	\$1.00	\$10.00	\$120.00
Children 5 and under	Free	Free	Free	Free

(1) Youth fares will change beginning June 3, 2019.

The Cherriots Local system map is provided in **Figure 7**. Frequent service routes are shown in red and standard service routes in blue.



**Figure 7.** Cherriots Local System Map



There are six commuter express routes, Cherriots Routes 1X, 10X, 20X, 30X, 40X, and 50X. The 1X travels between Salem and Wilsonville and is operated in cooperation with the City of Wilsonville’s South Metro Area Regional Transit

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(SMART). The 10X, 20X, 30X, 40X, and 50X are contracted regional routes operated by MV Transportation, Inc. and serve the rural communities of Marion and Polk counties. See the next section for more details on those routes.

Route 1X operates 13 round trips a day, with two trips in each direction provided by Cherriots during the morning and afternoon peak periods. Beginning in March 2016, in order to reduce over-crowding issues, one afternoon round-trip was added by Cherriots and one morning round-trip by SMART. Rides on the 1X cost \$3.00 for an adult to take one ride (\$1.50 for Reduced and Youth) or \$85.00 for a universal monthly pass (\$42.50 for Reduced and Youth,) which is also valid on the Cherriots Local and Cherriots Regional buses.

The Cherriots Local fleet is composed of diesel and compressed natural gas low floor buses that are compliant with the Americans with Disabilities Act (ADA), and are equipped with ramps and kneeling capability. Buses have an automatic stop announcement system as required by the ADA. Each bus is also equipped with electronic external destination signs and an electronic internal destination and information sign. This is an important accommodation accessibility feature for riders with disabilities. A priority seating area for seniors and people with disabilities is located near the front door of each vehicle. Buses also have bike racks that accommodate up to two bicycles. *More information on the Cherriots Local fleet is in **Appendix E**.*

### 3.3 Cherriots Regional

Cherriots Regional provides transit service to the smaller cities and largely rural areas in Marion and Polk counties. The purpose is to provide people, many of whom are seniors, people with disabilities, or individuals who are economically disadvantaged, access to medical services, education, employment, shopping, and recreational opportunities,. Service is provided through commuter express fixed routes (10X, 20X, 30X, 40X, and 50X) and a flex route (Polk County Flex). In Fiscal Year 2018, Cherriots Regional provided approximately 87,620 annual rides.

Cherriots Regional buses run Monday through Friday from approximately 6 a.m. to 9 p.m. and do not provide service on holidays. There are five primary Cherriots Regional routes (Routes 10X, 20X, 30X, 40X and 50X), all which connect to the Downtown Salem Transit Center. Cherriots Regional Routes 10X and 20X connect with Canby Area Transit (CAT) Route 99X and the Woodburn Transit Service (WTS) in the City of Woodburn. Route 20X connects with the City of Silverton's dial-a-ride van, The Silver Trolley in the City of Silverton. Route 40X connects with the Polk County Flex (PCF) in the cities of Dallas, Monmouth, and Independence. Route 50X connects with the PCF in Dallas. Volunteer driver programs exist at the West Valley Hospital (Salem Health's Connections Van) in Dallas and at the hospitals and

medical clinics in Silverton and Woodburn (Legacy Silverton Medical Center’s CareVan), which are available to people who need rides to their medical appointments.

The Polk County Flex is a scheduled service that operates only in and between Monmouth, Independence, and Dallas. It requires reservations made 24-hours in advance to the Cherriots call center. It will pick up and drop off passengers between 7 a.m. and 5 p.m. anywhere within the three cities according to its time schedule.

Routes 10X, 20X, 30X, 40X, and 50X operate as commuter express services and will not deviate off their routes as they once did. This system has been in place since May 8, 2017, and has been working well to keep the buses running on time. A map of the routes is in **Figure 8**. A description of all six Cherriots Regional routes can be found online on the Cherriots website at: [Cherriots.org/regional](http://Cherriots.org/regional)

Error! Not a valid bookmark self-reference. describes the Cherriots Regional fares as of January 2015. Cherriots Regional offers discounted fares at about two-thirds of the regular fare for youth, seniors, and people with disabilities. Monthly passes are also available to riders. Dial-a-ride fares on Cherriots Regional are equivalent to Cherriots Local fares. Tickets for Cherriots Regional services are sold at many locations throughout Marion and Polk counties, and some are provided by human services agencies to their clients.

**Table 10.** Cherriots Regional fares

	One-Way	Day Pass	Monthly Pass	Universal Month Pass <sup>1</sup>
Adult (19-59)	\$2.25	\$4.50	\$60.00	\$85.00
Reduced (60+, disabled, etc.)	\$1.50	\$3.00	\$30.00	\$42.50
Youth (6-18) <sup>2</sup>	\$1.00	\$2.00	\$20.00	\$42.50
Children 5 and under	Free	Free	Free	Free

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

(2) Youth fares will change beginning June 3, 2019.

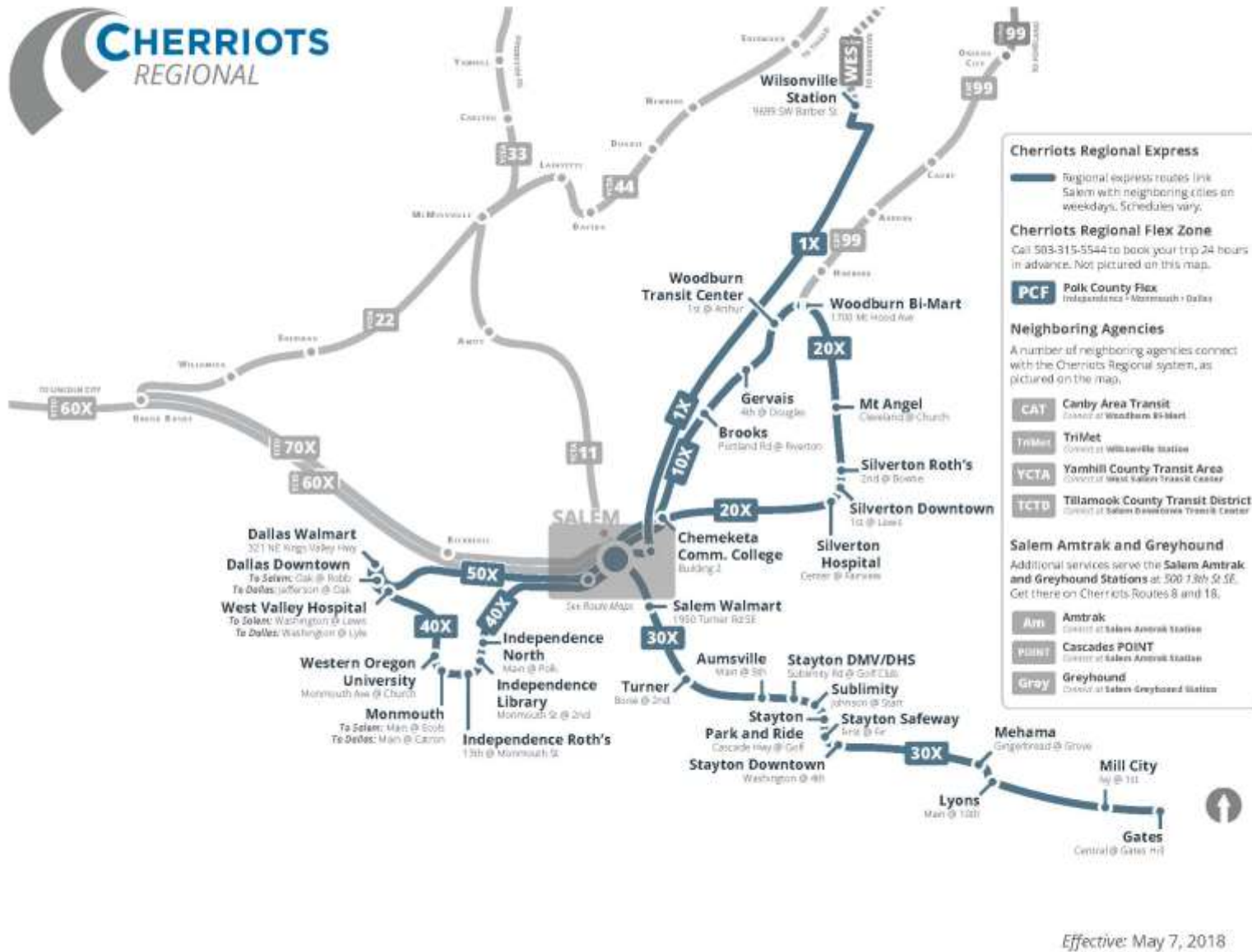
The Cherriots Regional fleet consists of 12 vehicles. The vehicles seat between 14 and 35 people and are capable of carrying up to two mobility devices. The vehicles range in age from less than a year to 15 years old. The vehicles are owned by Cherriots. Most buses are fitted with a bicycle rack that can transport up to three

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bikes, and some have space for two bicycles only. *Data on the Cherriots Regional vehicle fleet can be seen in **Appendix E**.*

Cherriots Regional administration is located with SAMTD staff in Salem. Cherriots Regional operation is contracted out to MV Transportation, Inc., but maintenance is performed by District employees. Due to Cherriots Regional's large service area, vehicles are stationed at two different locations. In Polk County, vehicles are operated out of the Public Works Road Maintenance facility located at 820 SW Ash Street in Dallas, while the Marion County vehicles are stored at the Hyacinth Street site in Salem. Cherriots Regional, which does not have its own fueling facility, uses Pacific Pride fueling sites located throughout Marion and Polk counties.

Figure 8. Cherriots Regional System Map



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### 3.4 Cherriots LIFT

Cherriots LIFT is the ADA complementary paratransit service offered by Cherriots within the Cherriots Local service area, which is defined by the Salem-Keizer Urban Growth Boundary. Cherriots LIFT provides origin to destination transportation service for individuals who cannot independently access Cherriots Local. There is a three step application process to determine eligibility for the transportation service. In Fiscal Year 2018, Cherriots LIFT provided about 132,680 rides. At least a 24-hour advanced reservation is required to ride Cherriots LIFT. Service hours and days are the same as Cherriots Local. The fare is \$3.20 each way and can be paid with either cash or a Cherriots LIFT ticket. Cherriots LIFT does not accept Cherriots Local passes. Cherriots LIFT is operated by a contracted transportation provider, currently MV Transportation, Inc. *Data on the Cherriots LIFT vehicle fleet is in **Appendix E**.*

### 3.5 Cherriots Shop and Ride Shopper Shuttle and Dial-a-Ride

The Cherriots Shop and Ride shopper shuttle and dial-a-ride services are administered by Cherriots and operated by MV Transportation, a contracted transportation provider. The Cherriots Shop and Ride provides origin to destination transportation services for seniors age 60 or older and for people with disabilities of any age. In FY18, Cherriots Shop and Ride provided approximately 9,981 annual rides. There is no application process for this transportation service. Through Federal Fiscal Year 2017, the Cherriots Shop and Ride had been funded entirely by state and federal grant funds, which are specific to the Salem-Keizer urban area. Data on the Cherriots Shop and Ride vehicle fleet can be seen in **Appendix E**.

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



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## 3.6 Mobility Management

Mobility Management is responsible for researching, planning, developing, coordinating, and implementing projects and programs related to public transportation options specializing in seniors and people with disabilities. This program assists seniors and individuals with disabilities to overcome barriers in accessing public transportation. Mobility Management offers a wide variety of individualized travel options and programs, including travel training, mobility device training, route planning, free community transportation services, program presentations, distribution of informational transportation resources; participation at source fairs, community events, community meetings; and collaborating and facilitating partnering opportunities with other agencies throughout the community. Mobility Management is a customer-driven, market-based approach to transportation focused on connecting the community to transportation. Mobility Management is vital to forging partnerships, collaborations, and opportunities within the community enhancing overall awareness of public transportation services and programs that are available. The Mobility Management Work Plan is in **Appendix F**.

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

In Fiscal Year 2018, 271 individuals were successfully travel trained; 186 meetings, presentations, and hosted informational table events were attended in order to educate and inform on Cherriots transportation services and programs; 9,704 individual and/or agency contacts were made; and Transit Hosts averaged over 39 contacts per day with over 6,000 trip planning interactions, the majority of which are with seniors and individuals with disabilities.

## 3.7 Cherriots call center and Medicaid brokerage

As of March 2018, Cherriots no longer serves as the Medicaid transportation broker for Marion and Polk counties. This service is now provided by LogistiCare. This means that the Cherriots call center no longer takes non-emergency medical transportation (NEMT) calls for the two-county region. NEMT is provided to

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Medicaid eligible people, with costs reimbursed through the Oregon Health Authority and the area's Coordinated Care Organization (CCO): Willamette Valley Community Health. Transportation is scheduled with the most appropriate and cost-effective means that meets a client's needs, including the following types of transportation services: bus (tickets/pass); wheelchair van/bus; taxi or sedan; secure transport; stretcher car. Approximately 22 service providers are authorized to deliver services in Marion and Polk counties on behalf of the program.

Qualified clients phone LogistiCare (844-544-1397) to schedule transportation. Customer Service Representatives verify their eligibility and schedule their ride with a transportation provider. The service is door-to-door. If a client requires further assistance, a personal care attendant will ride for free. Transportation may be provided 24 hours a day, 365 days a year for these trips only. There is no cost to eligible clients for OHP/Medicaid Transportation services.

During Fiscal Year 2018, there were 149,154 trips booked through the Cherriots call center for Cherriots LIFT, Cherriots Shop and Ride Shopper Shuttle, and Dial-a-Ride, and the Polk County Flex services. The call center also answers any general questions about any Cherriots service. The Cherriots call center is open every day except New Year's Day, Presidents Day, Memorial Day, Independence Day, Labor Day, Thanksgiving and Christmas. Hours of operation are Monday through Friday, 6 a.m. to 7 p.m., and Saturday, 10 a.m. to 4 p.m.

### **3.8 Woodburn Transit System (WTS)**

The City of Woodburn operates one fixed-route bus route and dial-a-ride vans within the City of Woodburn. This service provides coverage for most areas of town in a complicated figure eight pattern. The bus runs hourly on weekdays from 7-a.m. to 7 p.m. The local dial-a-ride program for seniors and people with disabilities also operates on weekdays, for people who cannot utilize the fixed-route bus. The service operates during the same hours as the fixed-route bus and utilizes fully ADA accessible vehicles. Ride requests must be made at least 24 hours in advance.

The dial-a-ride service will also arrange for volunteer drivers organized through the Retired and Senior Volunteer Program (RSVP) to take seniors and disabled residents to medical appointments in Woodburn, Salem, and Portland with at least 24-hour notice. Woodburn Transit fares are \$1.25 for the fixed route and \$2.50 for the dial-a-ride service.

For fixed-route service outside the city, Woodburn residents can use Cherriots Regional or Canby Area Transit (CAT).



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### **3.9 City of Silverton Silver Trolley**

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

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

Staff estimates that of the 14,000 to 18,000 trips provided per year, about 30 percent are to the hospital. Silverton owns one cutaway vehicle and two ADA accessible vans, which park at the city's community center and use part-time drivers. Maintenance is provided in-house by a certified mechanic. The city is responsible for scheduling and dispatching the Trolley trips.

### **3.10 West Valley Hospital Connections Van**

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

### **3.11 Silverton Hospital CareVan**

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

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### 3.12 Cherriots call center

The Cherriots call center (formerly the TripLink Call Center) takes reservations for the Polk County Flex, Cherriots LIFT, and Cherriots Shop and Ride. The call center no longer contracts with the Oregon Health Authority to book trips for Non-Emergent Medical Transportation (NEMT). This is now provided by LogistiCare through the region's Coordinated Care Organization (CCO) to provide transportation to eligible Oregon Health Plan (OHP) clients traveling to covered medical services.

### 3.13 Catholic Community Services

Catholic Community Services (CCS) operates one vehicle funded by Section 5310 funds to take people with cognitive disabilities to workshops and work sites as well as to activities in the community, medical appointments and other daily activities. The minivan is used at facilities that operate 24/7, Monday through Friday with availability to other CCS programs for the developmentally disabled in the evenings and on weekends. Paragon Homes provide stable, nurturing, family-like homes for people with developmental disabilities and fragile health, offering them an opportunity to live as independently as possible. Five of these homes are located in Salem and operate 24/7. The Integrated Services Network (ISN) assures a voice and a choice for adults with developmental or intellectual disabilities as a support services brokerage. CCS offers this program in eight counties, including Marion and Polk.

### 3.14 Participating human services agencies

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

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

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## **Chapter 4: Needs assessment**

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

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

The demographic analysis of the Marion and Polk county areas used 2011-2015 data from the most recent five-year American Community Survey (ACS) and 2014 Longitudinal Employer – Household Dynamics (LEHD) data from the U.S. Census Bureau. The analysis outlines recent and future trends for the total population and seniors and people with disabilities in the two-county area.

The stakeholder outreach component occurred in May and June of 2016 and included outreach and discussions with the key stakeholders involved in planning and delivering transportation services and social services to have them articulate and share their experiences, perceptions, and opinions about which needs are most critical to meet. This outreach was conducted utilizing a survey and a set of four regional stakeholder workshops held in Marion and Polk counties.

### **4.1 Existing service review**

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

- Cherriots services

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- Participants expressed positive experiences with services within the Salem-Keizer urban growth boundary.
  - Participants felt that it was, "...refreshing to see the interest from Cherriots Regional/Cherriots Local for information from all communities."
  - Bus drivers and travel training programs were described positively.
  - Cherriots vehicles, including ADA-accessible vehicles, are well maintained.
  - Cherriots LIFT drivers were described as patient, kind, and interact well with staff and riders.
  - Cherriots LIFT is an excellent asset to and increases the independence of people who attend a day program or have a job.
  - Cherriots Regional works well in the Santiam Canyon area, especially for seniors and youth.
  - Early morning (6:30 a.m.) Cherriots Regional service, can get people to work in Salem from faraway rural communities in Marion and Polk counties.
  - Non-emergency medical transportation volunteer driver programs
    - Salem Health West Valley Foundation has a volunteer driver program for their Connections Van program. The volunteer coordinator position is 50 percent funded by a STF grant. The Connections Van volunteers pick up hospital patients needing assistance to get to their medical appointments at the hospital in Dallas. Patients must be residents of Polk County and not have any other option to get to their appointments to qualify.
    - Legacy Silverton Medical Center's CareVan is a volunteer driver program that assists patients travelling to their medical appointments in Silverton, Mt. Angel, Woodburn, and Keizer.
  - Dial-A-Ride services and Age in Place programs in Woodburn
    - Woodburn Transit Dial-a-Ride for transportation within the city limits
    - Woodburn NEMT volunteer driver program to get people to medical appointments in Woodburn, Salem, and Portland; must be a city resident to qualify

## 4.2 Needs assessment

This section presents a list of identified unmet public transportation needs as described from the stakeholder workshops, a survey that went to local transit service

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providers and social service agencies in November and December 2015, and applicable remaining needs from the Cherriots 2009 Coordinated Transportation Plan.

### 4.3 Transportation service needs

- Restoration of services, such as Saturday or evening hour service, which had been previously cut
- Increased service availability
  - Service span (early morning and evenings)
  - Weekends and holidays
  - Commuter and midday (10 a.m. – 2 p.m.) routes
- Increased service geographic scope
  - Unserved or underserved areas
    - Small communities, rural, and low-density areas (primarily Cherriots Regional service)
      - Aurora, Aumsville, Brooks, Butteville, Dallas, Detroit, Donald, Falls City, Gates, Gervais, Grand Ronde, Hubbard, Idanha, Independence, Jefferson, Labish Village, Macleay, Marion, Mehama, Mill City, Monmouth, Mt. Angel, Rickreall, Scotts Mills, Shaw, St. Paul, Stayton, Turner, and West Stayton
      - Unincorporated north and east Marion County (Santiam Canyon area) and western Polk County
    - Expanded inter-city and inter-county service to/from Salem
      - Albany, Corvallis, Lincoln City, Canby, Oregon City, Portland, Tillamook, Tualatin, Wilsonville, and Woodburn
  - Lifeline/basic needs destinations such as shopping, groceries, social services, and medical facilities
- Increased service quality
  - More frequent service
  - Reduction of route travel time
  - Better reliability, schedule adherence, and on-time performance
  - Additional stops to make boarding/deboarding easier
- Dial-A-Ride (DAR)
  - Need DAR in Mehama, Mill City, and other rural communities

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- DAR vehicles not always suitable for some people in need
  - DAR services for basic needs (shopping, medical, and recreation)
  - Door-to-door and door-through-door paratransit service in Polk County outside of the Salem UGB area and in southern Marion County
  - Underserved groups
    - Addiction counseling/group therapy services in Polk County
    - Oregon Health Plan (OHP) enrollees and others who don't qualify for Medicaid services and who do not have the means to fulfill their transportation needs
    - Youth
    - People who are unable to schedule service in advance
    - People who are unable to accommodate lengthy trip times
  - Transportation to employer work sites during times of the day or week that Cherriots Local or Regional service is not running, especially for people with disabilities

#### **4.4 Infrastructure needs**

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

#### **4.5 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

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

## **4.6 Marketing, customer service, and outreach needs**

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

## **4.7 Technology needs**

- Cherriots Regional vehicles need fareboxes identical to Cherriots Local for fare integration
- Security cameras on Cherriots Shop and Ride vehicles and some Cherriots LIFT vehicles (cameras are not currently in any Cherriots LIFT MV-1 vehicles)
- Speaking/digital schedules at bus stops
- Electronic signs at transit centers and major bus stops listing the next bus arrival
- Equip buses with AVL and/or GPS systems for real-time tracking

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- Text alerts on additional transit services (in the past, riders on the West Salem Connector could receive a text or automated phone call to tell them when the bus is five minutes away from their stop.)
  - Expand on web-based ride reservation system pilot project that was tested with Willamette Valley Community Health and/or the West Salem Connector web-based booking system

## **4.8 Capital and funding needs**

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

# **Chapter 5: Priorities and strategies**

This chapter presents an overview of strategic initiatives, technologies, opportunities for coordination and other methods to improve transportation services for seniors and people with disabilities within Marion and Polk counties. The strategies were generated from the four stakeholder meetings, the 2009 and 2016 Coordinated Plans, current transit research, and a review of Coordinated Transportation Plans from peer agencies.

## **5.1 Priorities**

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

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



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During the stakeholder workshops, participants were asked to comment on a set of priorities based partially on the previous list, along with additional priorities. When presented to project stakeholders during the four workshops, there was general agreement that the following seven priorities should be included as part of 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 for adequate capital replacements and maintenance of vehicles and other fundamental requirements to provide service.
- Consider providing non-emergency medical transportation for non-Medicaid people in rural Marion 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.

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

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## 5.2 Strategies

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

## 5.3 Transportation service strategies

- Sustain current service levels.
- As funding allows, implement the “A Better Cherriots” plan (addition of weekend, holiday, extended evening service, and more) using State Transportation Improvement Fund (STIF) dollars beginning in September 2019.
- Develop service area guidelines<sup>2</sup> for Cherriots and use the guidelines to address gaps in public transit services.
- Identify areas with the greatest need for additional or enhanced transit services.
  - Add weekend service on Cherriots Local, Cherriots Regional, and Cherriots LIFT.
  - Extend evening hours on Cherriots Local and Cherriots Regional during the weekdays.
  - Improve frequencies where service is too infrequent.
- Increase capacity of existing volunteer programs by increasing the fleet of accessible vehicles for community-based services.
- Review services such as the former West Salem Connector and identify additional locations in the two-county area this service could be replicated.
- Explore options for circulator, feeder route, and flexible route dial-a-ride services.

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

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- Improve regional connections between modes and service providers.
  - Where allowable, explore partnerships with Transportation Network Companies (TNCs) such as Uber or Lyft to provide first-mile/last-mile transportation for customers that can utilize fixed-route transit for part of their trip.
  - Explore opportunities to expand Drive Less Connect or develop a new platform for ride-matching for seniors and people with disabilities.

## **5.4 Infrastructure strategies**

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

## **5.5 Coordination and organizational strategies**

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

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- Monitor Oregon Health Plan funded non-emergency medical transportation for coordination opportunities.
  - Review the Legacy Silverton Medical Center program (CareVan) for trips to/from the hospital for opportunities to coordinate trips for passengers along route.

## **5.6 Marketing, customer service, and outreach strategies**

- Develop and distribute information promoting travel options, counseling services, and provide web and application-based information systems.
- Increase communication and marketing efforts to make members of the public and 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.
- Enhance and develop travel training materials such as videos, educational brochures, and provide on-location presentation by travel trainers.
- Conduct outreach to increase the number and geographic area of volunteer drivers.
- Survey riders for feedback to improve drop-off and pick-up locations.

## **5.7 Technology strategies**

- Develop and test new technology to improve service efficiencies.
- Develop or purchase open source software to enable multiple operators to connect with a single clearinghouse for trip planning and scheduling.
- Work 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.

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## 5.8 Capital and funding strategies

- Advocate for increased funding and seek out new and innovative funding opportunities.
- Review bus inventory against route/passenger needs.
- Advocate for adequate capital replacements.
- Continue to develop and implement vehicle maintenance schedules.
- Review funding application process and application materials on a biennial basis.

## **Chapter 6: Unmet needs/strategies and next steps**

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

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*Table 11*, below, summarizes the unmet transportation needs in the left column, and suggests a corresponding service strategy in the right column. The list of strategies should be viewed as a “catalogue” of service alternatives and do not necessarily represent programs that have existing funding sources which may be available to initiate or jump-start the strategy. Over time, Cherriots and the STFAC should continually refine and update the list of preferred strategies with the goal of prioritizing those most feasible to pursue, and those that would best address identified unmet needs.

**Table 11.** Unmet needs and corresponding strategies

Unmet transportation need(s)	Corresponding strategy(s)
<p><b>Transportation service needs</b></p> <ul style="list-style-type: none"> <li>• Restoration of services that had been previously cut</li> <li>• Increase service availability</li> <li>• Increase service geographic scope</li> <li>• Increase service quality</li> <li>• Increase Dial-A-Ride (DAR) services</li> <li>• Door-to-door and door-through-door paratransit service in Polk County outside of the Salem-Keizer Urban Growth Boundary and in southern Marion County</li> <li>• Increase service for underserved groups</li> </ul>	<p><b>Transportation service strategies</b></p> <ul style="list-style-type: none"> <li>• Implement the “A Better Cherriots” plan (addition of weekend, holiday, extended evening service, and more)</li> <li>• Develop service area guidelines<sup>3</sup> for Cherriots</li> <li>• Identify areas with the greatest need for additional or enhanced transit services</li> <li>• Increase capacity of existing volunteer programs</li> <li>• Identify additional locations for service similar to the former West Salem Connector</li> <li>• Explore options for circulator, feeder route, and flexible route Dial-A-Ride services</li> <li>• Improve regional connections between modes and service providers</li> <li>• Explore partnerships with TNCs</li> <li>• Explore opportunities to expand Drive Less Connect</li> </ul>

<sup>3</sup> See p. 49 for a definition of service area guidelines.

<p><b>Infrastructure needs</b></p> <ul style="list-style-type: none"> <li>• Bus stops</li> <li>• Pedestrian improvements</li> <li>• Small transit centers in communities without a transit center or major transit stop with a shelter</li> </ul>	<p><b>Infrastructure strategies</b></p> <ul style="list-style-type: none"> <li>• Prioritize bus stops that need improvements</li> <li>• Review existing pedestrian plans for opportunities and funding sources to improve sidewalk and pedestrian infrastructure</li> <li>• Coordinate with local jurisdictions to identify opportunities to improve stop accessibility during roadway construction or development projects</li> <li>• Advocate for age- and disability-friendly streets</li> <li>• Create facilities and transit centers that provide services to seniors and people with disabilities</li> </ul>
<p><b>Coordination and organizational needs</b></p> <ul style="list-style-type: none"> <li>• Coordinate services that cross jurisdictional and transit provider service area boundaries</li> <li>• Coordinate services among social service agencies, senior centers, medical facilities, employers, and other organizations to share information about local transportation options, training opportunities, and other information</li> <li>• Central dispatch for transportation services</li> <li>• Fare sharing across services such as the ability to use a day pass on both the Cherriots Regional and Cherriots Local systems</li> <li>• Apply technological solutions to facilitate coordination efforts</li> </ul>	<p><b>Coordination and organizational strategies</b></p> <ul style="list-style-type: none"> <li>• Regularly review the Coordinated Plan with the STFAC to evaluate progress</li> <li>• Coordinate with rider groups and destinations to optimize trip scheduling</li> <li>• Coordinate with public and private sector organizations to identify opportunities for joint scheduling or sharing of vehicles</li> <li>• Expand awareness of home delivery services such as “Meals on Wheels”</li> <li>• Monitor Oregon Health Plan funded non-emergency medical transportation for coordination opportunities</li> <li>• Review the Legacy Silverton Medical Center CareVan program</li> </ul>



	<p>for opportunities to coordinate trips for passengers along route</p> <ul style="list-style-type: none"> <li>• Encourage seniors and people with disabilities to utilize online trip planning tools</li> </ul>
<p><b>Marketing, customer service, and outreach needs</b></p> <ul style="list-style-type: none"> <li>• Increase accountability, customer service, responsiveness, and human interaction</li> <li>• Increase the amount of information available in Spanish</li> <li>• Improved access to and availability of information, education, and outreach about the range of transportation providers and services is needed in both the urban and rural areas</li> <li>• Increase frequency and breadth of marketing/advertising</li> <li>• Increase the number of volunteer drivers</li> </ul>	<p><b>Marketing, customer service, and outreach strategies</b></p> <ul style="list-style-type: none"> <li>• Develop and distribute information promoting travel options services and provide web-based and application-based information systems</li> <li>• Improve communication and marketing efforts to increase awareness of transportation options</li> <li>• Explore a fare assistance program for people with low income</li> <li>• Provide more driver training to ensure a positive, consistent customer experience by incorporating feedback from well-regarded drivers</li> <li>• Expand travel training programs</li> <li>• Enhance and develop travel training material</li> <li>• Conduct outreach to increase the number and geographic locations of volunteer drivers</li> <li>• Survey riders for feedback to improve drop-off and pick-up locations</li> </ul>
<p><b>Technology needs</b></p> <ul style="list-style-type: none"> <li>• Cherriots Regional vehicles need fareboxes identical to Cherriots Local buses for fare integration</li> <li>• Security cameras on Cherriots Shop and Ride vehicles and some Cherriots LIFT vehicles (cameras</li> </ul>	<p><b>Technology strategies</b></p> <ul style="list-style-type: none"> <li>• Develop and test new technology to improve service efficiencies</li> <li>• Develop or purchase open source software to enable multiple operators to connect with a single</li> </ul>

<p>are not currently in any Cherriots LIFT MV-1 vehicles)</p> <ul style="list-style-type: none"> <li>• Speaking/digital schedules at bus stops</li> <li>• Electronic signs at transit centers and major bus stops listing the next bus arrival</li> <li>• Equip buses with AVL and/or GPS systems for real-time tracking</li> <li>• Text alerts on additional transit services</li> <li>• Expand on the ongoing web-based ride reservation system pilot project with Willamette Valley Community Health and/or the former West Salem Connector web-based booking system</li> </ul>	<p>clearinghouse for trip planning and scheduling</p> <ul style="list-style-type: none"> <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>
<p><b>Capital and funding needs</b></p> <ul style="list-style-type: none"> <li>• Bus and equipment replacements</li> <li>• Provide high quality buses that meet a range of physical needs</li> <li>• Service additions and enhancements</li> <li>• Fare subsidies</li> </ul>	<p><b>Capital and funding strategies</b></p> <ul style="list-style-type: none"> <li>• Advocate for increased funding and seek out new and innovative funding opportunities</li> <li>• Review bus inventory against route/rider needs</li> <li>• Advocate for adequate capital replacements</li> <li>• Continue to develop and implement vehicle maintenance schedules</li> <li>• Review funding application process and application materials on a biennial basis</li> </ul>

**6.1 Next steps**

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

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1. Cherriots staff to develop a strategy for Coordinated Plan implementation. As needed, the STFAC and public and private stakeholders will be included in order to gain feedback on the proposal for Coordinated Plan implementation.
  2. 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 STF and Section 5310 funding and application processes.

## **List of appendices:**

Appendix A: Summary of stakeholder workshops held in 2016

Appendix B: 2016 stakeholder workshop comments

Appendix C: People aged 65 years and older demographic data

Appendix D: Social service agency descriptions

Appendix E: Cherriots Vehicle Fleet Maintenance Plan (2018)

Appendix F: Mobility Management Work Plan

Appendix G: Survey results matrix

Appendix H: Sample Public Notice

Appendix I: Sample Web Article

Appendix J: Sample STF Grant Application

Appendix K: Sample STF Grant Application Instructions

Appendix L: Sample 5310(ODOT) Grant Application

Appendix M: Sample 5310(ODOT) Grant Application Instructions

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

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

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



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

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

## Key Themes and Highlights

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

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

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

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

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

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

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

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

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

## Appendix B: 2016 Stakeholder Workshop Comments

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

- Salem Health Foundation offers taxi service to/from any of their clinics. Regardless of community, where the individual lives. They will ask if you can pay.
- CherryLift driver JJ is the Best – he is patient, kind and has wonderful interactions with staff and the persons we support.
- Trip link for medical transport
- City busses that accommodate wheel chairs
- Having a “trip trainer” for individuals with disabilities
- CherryLift is an excellent asset to our individuals who attend a day program or have a job. Having a ride to and from increases their independence.
- CARTS works well for North Canyon
- Private taxi
- Woodburn Dial a Ride
- There is a trainer who will ride with someone, show them how to ride one on one
- Aumsville stop has a shelter
- CARTS up the canyon service works for some, Current system working well for up canyon residents, seniors and youth
- Bus drivers and vehicles are very well kept and have been for a long time
- Urban Growth Boundary - Green line, Red line, NEMT, cherrilift
- NEMT, silverton health caravan, salem health program
- Silverton health – 400 riders/month within hospital – goes to other cities as long as folks going to silverton hospital, works through volunteers
- Salem hospital – need transportation services to Marion and Polk County since its services does not cover dental services. Service is funded through hospital and grant funding(Woodburn, Silverton, Stayton)
  - 2500 rides/yr
  - 50% of client base is seniors
- Salem health does coordination and rides through taxi are providing rides through Marion and Polk Counties
- Clackamas County – volunteers go door to door picking up seniors for appointment or recreation
- Woodburn dial a ride – need to give a 24 hour notice
- Woodburn volunteer medical trips and drivers
- CARE vans
- Silverton Hospital Caravan
- Dial a ride is a window of opportunity – flex route
- Neighbors help seniors travel to their destination
- The morning CARTs service (6:30 am)

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

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



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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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



## PEOPLE AGED 65 YEARS AND OLDER DEMOGRAPHIC DATA

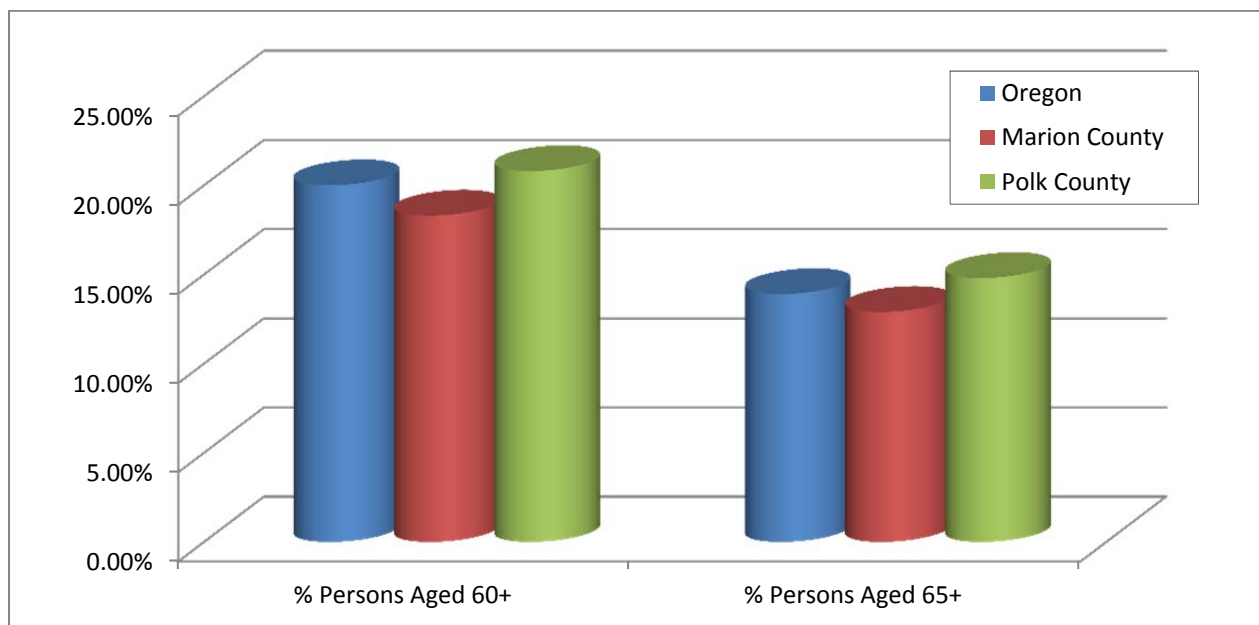
This appendix contains supplemental demographic data for seniors 65 years and older. **Table C1** and **Figure C1** provide a “snapshot” of seniors 60 years and older and 65 years and older.

**Table C1. Population Characteristics**

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

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

**Figure C1. Population Characteristics**



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

### Older Adults

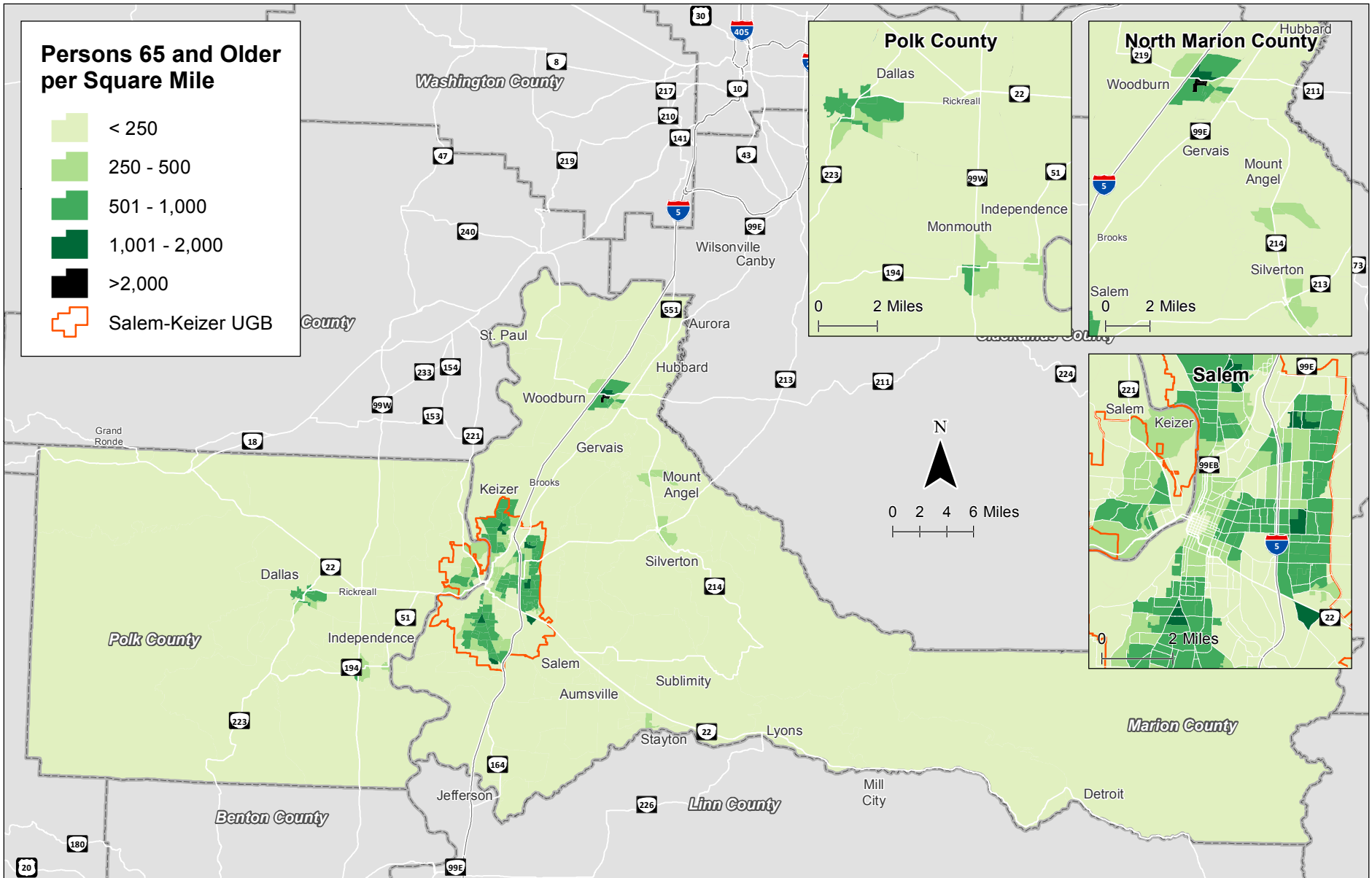
**Figure C2** provides a population density map of people aged 65 and older, in Marion and Polk counties. It shows that high concentrations of seniors are in the Salem-Keizer area, where the population is denser in general. Outside of the Salem area, the largest concentrations of seniors are in Dallas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

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

City	2010 Population Age 65+ <sup>1</sup>	% Age 65+	City	2010 Population Age 65+ <sup>1</sup>	% Age 65+
Salem	18,560	12.0%	Jefferson	290	9.4%
<b>Keizer</b>	<b>4,850</b>	<b>13.3%</b>	<b>Mill City<sup>3</sup></b>	<b>250</b>	<b>13.5%</b>
<b>Woodburn</b>	<b>3,710</b>	<b>15.4%</b>	Hubbard	210	6.6%
<b>Dallas</b>	<b>2,740</b>	<b>18.8%</b>	Willamina <sup>3</sup>	200	9.8%
Hayesville <sup>2</sup>	2,090	10.5%	<b>Falls City</b>	<b>150</b>	<b>16.3%</b>
Four Corners <sup>2</sup>	1,800	11.3%	Aurora	100	10.8%
<b>Silverton</b>	<b>1,240</b>	<b>13.5%</b>	<b>Gates</b>	<b>100</b>	<b>21.9%</b>
Stayton	990	12.9%	Donald	90	9.7%
Monmouth	900	9.4%	Gervais	90	3.7%
<b>Sublimity</b>	<b>780</b>	<b>29.0%</b>	St. Paul	50	12.4%
Independence	750	8.7%	Scotts Mills	40	11.8%
<b>Mount Angel</b>	<b>690</b>	<b>20.9%</b>	<b>Detroit</b>	<b>30</b>	<b>15.8%</b>
<b>Turner</b>	<b>340</b>	<b>18.3%</b>	<b>Idanha</b>	<b>20</b>	<b>17.9%</b>
Aumsville	300	8.4%			

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

H:\projfile\18932 - ODOT Region 2 Coordinated Plans\gis\Polk\_Marion\_Maps\A2 Population Density 65 and Older.mxd - isomnerville - 11:46 AM 3/16/2016



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

**Figure A2**

## **Appendix D: Public providers**

The following transit and social service providers do not currently receive STF and Section 5310 grant funding through SAMTD, and therefore are not considered “existing” providers, as prioritized in Chapters 6 and 7 of the Coordinated Plan.

### **D.1 Canby Area Transit (CAT)**

Canby Area Transit (CAT) provides service within Canby and to Oregon City, Barlow, Aurora, Hubbard, and Woodburn from Canby Transit Center. Route 99X is the only fixed-route currently in operation and provides circulation within the city between the Canby Market Center, Canby Transit Center, and Canby Square areas with headways between 30 and 60 minutes. Service is provided between 5a.m. and 10:45 p.m., Monday through Friday and does not operate on major holidays. Route 99X makes 12 daily round trips from Oregon City to the Canby Transit Center. Another 14 round trips go from Oregon City to the Bi-Mart store in Woodburn on Mt. Hood Avenue.

In Oregon City, the 99X provides connections to TriMet buses at the Oregon City Transit Center. Connections with Woodburn Transit and Cherriots Regional Routes 10X and 20X are possible at the Bi-Mart stop in Woodburn. Additionally, SMART Route 3X serves the Canby Transit Center every 60 to 90 minutes, offering connections to Wilsonville and the South Clackamas Transportation District (SCTD) has bus service to Molalla every 60 to 90 minutes (eight total daily round trips) from the Canby Transit Center. CAT service on Route 99X costs \$1.00 for a one-way ride, and is free for children six years old and younger. A monthly pass may be purchased for \$20.

A few of the CAT trips to Woodburn meet with Cherriots Regional Routes 10X and/or 20X within a reasonable connection time period. A planning study was completed in 2018 to identify the possibilities of CAT and Cherriots partnering to provide some service that travels from Salem to Oregon City, but an agreement hasn't been finalized as of February 2019.

SMART operates its Route 3X between Canby and Wilsonville with 12 daily round-trips. The service costs \$1.50 per trip for adults and \$0.75 for seniors (60+), disabled, and youth. A transfer to TriMet Westside Express Service (WES) commuter rail is possible at SMART Central at Wilsonville Station.

CAT operates a dial-a-ride service for members of the general public who are traveling to or from destinations within the Canby Urban Growth Boundary. Service is available from 8 a.m. to 6 p.m., Monday through Friday. Service is not available

during major holidays. Dial-A-Ride vehicles are equipped with wheelchair lifts, prioritized seating for seniors and people with disabilities, and bicycle racks. Paratransit service is available for eligible people who are unable to use shuttles or fixed route buses. Reservations can be made via phone up to 14 days in advance. General dial-a-ride service costs \$1.00 per ride.

## D.2 South Metro Area Regional Transit (SMART)

South Metro Area Regional Transit (SMART) is operated by the City of Wilsonville and provides public transit service in and around Wilsonville. SMART operates nine fixed bus routes from 5 a.m. to 8:30 p.m. on weekdays, two routes (Routes 2X and 4) on Saturdays, and does not operate on Sundays or major holidays.

Route 1X is jointly operated by Cherriots and runs between SMART Central at Wilsonville Station and the Downtown Salem Transit Center. Route 2X travels to the Barbur Boulevard Transit Center in Portland and connects with TriMet Routes 12, 64, and 94. Route 3X travels to Canby Transit Center allowing for direct transfers with CAT Route 99X and the SCTD bus to Mollala. Routes 4, 5, and 6 operate exclusively within Wilsonville. Routes 5 and 2X connect with TriMet Route 96, with service to downtown Portland, at Commerce Circle in Wilsonville. Route 7 provides a shuttle service to and from the Villebois neighborhood in West Wilsonville. Routes C and V are mid-day shopper shuttles from the Charbeneau and Villebois neighborhoods, respectively. All numbered SMART routes connect with TriMet WES Commuter Rail at SMART Central at Wilsonville Station. WES provides weekday peak period service to Tualatin, Tigard, and Beaverton.

SMART fares are shown in Error! Not a valid bookmark self-reference.. Service is free on Routes C, V, 4, 5, 6, and 7 that operate within Wilsonville. Universal monthly passes for all routes are available for \$85 (\$42.50 for youth, seniors, disabled, or Medicare card holders).

**Table 1.** SMART Fares

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

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

### D.3 Tri-County Metropolitan Transportation District of Oregon (TriMet)

Tri-County Metropolitan Transportation District of Oregon (TriMet) is the transit operator for the Portland metropolitan area, including parts of Multnomah, Washington, and Clackamas counties. TriMet is the largest transit operator in the state and provided approximately 97 million boardings in Fiscal Year 2018 on 85 bus lines, five MAX light rail lines, and WES commuter rail. Service across the TriMet system is available 24 hours a day on some routes, but generally from 4:30 a.m. to 2:30 a.m. on the majority of the system. Fares on TriMet are shown below in **Table 12**, and allow passengers to ride on any combination of buses, MAX light rail, WES, or the Portland streetcar system.

**Table 2.** TriMet fares

Fare Type	2.5-Hr Ticket	1-Day Pass	Monthly Pass	Annual Pass
Adult (18-64)	\$2.50	\$5.00	\$100	N/A
Honored Citizen (Low income, 65+, Medicare or disability) / Youth (7-17 or high school/GED)	\$1.25	\$2.50	\$28	N/A
LIFT Paratransit	\$2.50	-	\$74	\$888

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

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

#### **D.4 Yamhill County Transit Area (YCTA)**

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

- Route 11 (McMinnville - Salem): Connects McMinnville to West Salem at the West Salem Transit Center for transfers to Cherriots Local buses. Route 11 makes two morning, a midday, and two afternoon round trips on weekdays.
- Route 22 (McMinnville - West Valley): Connects McMinnville to Sheridan, Willamina, and Grand Ronde with seven weekday round trips, and four Saturday round trips.
- Route 33 (McMinnville - Hillsboro): Connects McMinnville to Carlton, Yamhill, Gaston, Forest Grove and to the MAX light rail (Blue Line) in Hillsboro with two morning, a midday, and two afternoon round trips on weekdays.
- Route 44 (McMinnville – 99W): Connects McMinnville to Lafayette, Dundee, Newberg, Sherwood, and Tigard. Route 44 operates 10 weekday round trips, which includes an express route (Route 45x), and four Saturday round trips.

Fixed route one-way regular fare is \$1.25 and a single day-pass is \$2.50. Unlimited monthly passes are \$35. Service runs from 5 a.m. to 9 p.m.

YCTA provides origin to destination dial-a-ride services for anyone who is unable to access the fixed route system because of mobility limitations or those whose origins and destination are not within close proximity to fixed routes. The fare is \$1.75 one-way and \$40 for an unlimited monthly pass. Dial-a-ride service operates from 8 a.m. to 4:30 p.m. on weekdays. Reservations must be made 24 hours in advance by phone.

## **D.5 Albany Transit**

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

Fixed route, one-way regular fare on ATS buses is \$1.00 and \$0.50 for seniors older than 60, people with disabilities, and youth aged 6-17 years old. Unlimited monthly passes are \$30 and \$15 for seniors, people with disabilities, and youth. Coupon books containing 20 rides each can be purchased for \$17 for regular fares and \$8.50 for seniors, people with disabilities, and youth.

ATS also provides curb-to-curb Call-A-Ride senior and disabled transportation services within Albany and Millersburg. Eligibility is limited to those residents who live within the City of Albany or Millersburg and are over 60 years old or have a disability that prevents them from accessing the fixed route ATS bus system. The fare is \$2.00 one-way and \$40 for a 20 ride ticket book. Call-a-ride service operates from 6:30 a.m. and 6:30 p.m. on weekdays and from 8a.m. to 6 p.m. on Saturdays. No service is provided on Sunday or on holidays. Reservations can be made up to two weeks in advance by phone for the Call-A-Ride.

## **D.6 Tillamook County Transportation District**

The Tillamook County Transportation District (TCTD) took over service between Salem and Grand Ronde that was formerly provided by Cherriots (Route 2X) in January 2018. Now, TCTD's Routes 60X and 70X offer seven daily round trips to Grand Ronde. The 70X serves the Rickreal park and ride lot in Polk County and also goes to Spirit Mountain Casino (the largest employer in Grand Ronde), and the



Grand Ronde Health and Wellness Center. The Coastal Connector (Route 60X) provides seven-day a week service between Salem and Lincoln City running three round trips per day, including stops at the Chinook Winds Casino in Lincoln City and Rose Lodge (located about half way between Lincoln City and Grand Ronde). The 60X and 70X routes serve both the Downtown Salem Transit Center and the Salem Amtrak/Greyhound Station to provide intercity connections with Greyhound, Amtrak, and Cascades Point buses as well as the Cherriots Local and Regional bus systems.

## **D.7 Polk County Falls City Direct Connect**

Falls City Direct Connect (FCDC) is a rural bus line that serves the residents of Falls City by providing free transportation to critical services in Dallas and Monmouth/Independence. Service connections include agencies that provide basic needs, health and social services, employment and educational opportunities, etc. Except for a convenience store, none of these services are available within or near Falls City. Moreover, 78% of riders in the last year reported having no other transportation.

2017 census estimates for Falls City included: 1,055 total residents; 369 seniors age 55+; 189 seniors age 65+; 319 persons with disabilities (30.2% of the total city population compared to 14.4% in Polk County and 14.6% state-wide); and 106 seniors age 65+ with disabilities (10.0% of the total city population compared to 6.0% in Polk County and 6.0% state-wide). This population has a notably higher percentage of persons with disabilities, who are isolated from basic needs and critical services. Access to reliable transportation is essential for the health and well-being of this community.

FCDC services are open to the public and our bus is equipped with a wheel chair lift to support riders with disabilities. Currently, we operate every Tuesday and Thursday. Bus times, routes and stops were planned based on community input and identified need. This grant application is requesting funding to cover existing operational costs and to expand services to 4 days/week, adding Friday/Saturday. Saturday service would include a stop at the Polk Community Free Clinic, which only operates on Saturdays, and would increase accessibility to medical care for uninsured individuals. Because the bus operates on a regular schedule and is open to the public, dispatch is not necessary.

## **D.8 Disabled American Veterans Transportation**

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

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

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

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

## **D.9 Marion County Housing Authority**

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

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

## **D.10 Marion County Retired Senior Volunteer Program (RSVP)**

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

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

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

## **D.11 Northwest Senior and Disability Services**

Northwest Senior and Disability Services provides assistive services to seniors and persons with disabilities. Services include adult protective services, in-home care, meal programs, employment services, counseling, volunteer opportunities, and

medical and financial assistance. The organization does not offer transportation services to clients but refers them to transportation brokerages like Cherriots call center. In general, people who do not use public transportation use their own personal vehicles and mileage is reimbursed for medical trips through the Medical Assistance Program.

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

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

## **D.12 Oregon Commission for the Blind**

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

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

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

## **D.13 Oregon Health Authority**

The Oregon Health Authority (OHA) provides coordination assistance and contracts for Medicaid non-emergent medical transportation (NEMT) brokerages, senior and disabled non-medical transportation, and vocational rehabilitation ride vouchers. OHA pays for transportation for their clients, with rides being booked through the Cherriots call center. Transportation is scheduled with the most appropriate and cost-effective means that meets a client's needs, including the

following types of transportation services: bus (tickets/pass); wheelchair van/bus; taxi or sedan; secure transport; stretcher car Staff also provides transportation for foster children and mileage vouchers to clients for medical trips. In addition to using the above services, OHA clients use Veterans' Affairs transportation as well as the RSVP volunteer driver program, although these are not coordinated for clients through OHA.

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

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

## **D.14 Resource Connections of Oregon**

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

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

## D.15 Shangri-La Corporation

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

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

## D.16 Private providers

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

### **Amtrak**

Amtrak is the nationwide rail service allowing residents to travel within Oregon and across the nation. Amtrak service in Marion and Polk counties is only available in Salem. The Salem Amtrak Station is located at 500 13th Street NE and is served by Cherriots Routes 8 and 18. Two Amtrak routes serve Salem: the Amtrak Cascades and the Coast Starlight.

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

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

### **Greyhound**

Greyhound provides nationwide bus service. Greyhound is available in Salem and Woodburn. The Salem Greyhound Station is located at 500 13th Street SE, approximately 1 mile away from the Salem Downtown Transit Center served by Cherriots Local routes and Cherriots Regional. Service is available from Salem and Woodburn to Corvallis and Portland. Four daily northbound and southbound trips are available from the Salem Station. Only two trips in each direction stop in Woodburn.

### **HUT Airport Shuttle**

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

### **Spirit Mountain Casino Shuttle**

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

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

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

## **Taxis**

- The larger taxicab companies in Marion and Polk Counties are based in Salem and provide some service to smaller communities without taxicab service. All taxicab companies listed provide service to Salem, Portland, as well as the rest of Marion and Polk counties. There are thirteen cab companies in Woodburn that are not listed here.
- Willamette Valley Yellow Cab: Based in Salem, has wheelchair accessible vehicles available
- Amanda's Taxi: Based in Salem
- Diamond Cab: Based in Salem
- Affordable Taxi: Based in Salem
- Silverton Taxi: Operates one cab
- Squirrels Taxi Service: Operates one cab serving Dallas, Monmouth, and Independence





# FLEET MAINTENANCE PLAN

MAY 2018

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# Cherriots Fleet Maintenance Plan

Revision	Date	Reason
	10/31/15	Original
1	05/04/18	General Update



### ***Title VI***

Cherriots ensures full compliance with Title VI of the Civil Rights Act of 1964 by prohibiting discrimination against any person on the basis of race, color, national origin or sex in the provision of benefits and services resulting from its federally-assisted programs and activities. For questions regarding Cherriots Title VI Program, you may call (503) 588-2424.

### ***Americans with Disabilities Act (ADA) Information***

The Americans with Disabilities Act, Title II, states, in part, that "no otherwise qualified disabled individual shall, solely by reason of such disability, be excluded from the participation in, be denied the benefits of, or be subjected to discrimination in programs, services or activities sponsored by a public entity." At Cherriots, we are committed to complying with the requirements of Title II of the ADA in all of its programs, services, benefits and activities.

# ACRONYMS

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ADA	Americans with Disabilities Act
APC	Automatic Passenger Counters
ASA	Automated Stop Announcements
AVL	Automatic Vehicle Location
CAD	Computer Aided Dispatch
CBI	Contingency Bus Inspection
CNG	Compressed Natural Gas
DRI	Digital Recorder – Voice Announcing System
DVI	Daily Vehicle Inspection
DVIR	Daily Vehicle Inspection Report
FTA	Federal Transit Administration
PM	Preventive Maintenance
SOPs	Standard Operating Procedures
TC	Transit Center <ul style="list-style-type: none"><li>• DTC – Downtown Transit Center</li><li>• KTC – Keizer Transit Center</li><li>• WSTC – West Salem Transit Center</li></ul>
UGB	Urban Growth Boundary

# 1. Introduction

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Salem Area Mass Transit District, more commonly known as Cherriots, is a transit district based in Salem, Oregon. Cherriots provides weekday bus and paratransit service in Salem and neighboring Keizer, as well as to Marion and Polk counties. Salem Area Mass Transit District was established by the State of Oregon in 1979. Before then, the City of Salem operated bus service under the name Cherriots.

The population of Salem's urbanized area is around 236,000 along Interstate 5 and the population of the overall Cherriots service area is around 410,000, covering 76 square miles in the Willamette Valley of Oregon. In Fiscal Year 2016, annual Cherriots ridership between all services was just over 3.6 million, averaging 14,300 rides per day. Bus service operates with 53 peak vehicles. There are an additional 43 vehicles dedicated to providing Cherriots LIFT paratransit service.

Cherriots is governed by a seven-member, elected Board of Directors and provides service in both Marion and Polk counties. Salem is the Capital of Oregon, and the Salem-Keizer urbanized area is situated 47 miles south of Portland and 64 miles north of Eugene.

The range of Cherriots urban local fixed-route and commuter bus service, rural commuter express service, paratransit service, and dial-a-ride service specific to seniors and individuals with disabilities, provide approximately 3.6 million passenger trips annually. All Cherriots services operate Monday through Friday, 6:00 a.m. to 9:00 p.m., with no weekend service currently.

Cherriots local fixed-route bus services are primarily offered within the Salem-Keizer Urban Growth Boundary (UGB), as defined by state statute. The Cherriots Regional service connects the Salem-Keizer area with the city of Wilsonville to the north, where riders can directly access the Portland metropolitan area, as well as to surrounding, rural communities in Marion, Polk, Linn, Yamhill, and Clackamas counties. The population served by Cherriots full range of services is well over 500,000.

Cherriots mission is to connect people with places through safe, friendly, and reliable public transportation services. With 22 Cherriots local routes, fixed-route service provides regularly-scheduled transit service connecting workforce centers, a multitude of medical and health care services, senior centers, continuing education establishments, and shopping districts. Cherriots partners with outlying communities to provide commuter express services that bring people directly from outlying areas to the critical services offered within the cities of Salem and Keizer.

Salem is the state capital and the county seat of Marion County. Cherriots operates specific routes that are aimed at providing transportation to large work centers, such as the Capitol Mall, Chemeketa Community College, and Salem Hospital. One of the busiest corridors of the city, Lancaster Drive, is home to malls and retail facilities. These are large employment providers and generate jobs for economically-disadvantaged individuals. The most popular destination of transit riders in east Salem is Chemeketa Community College, another large employer and our local community college.

The population of Cherriots service area grew 14.2 percent from 2000 to 2010, and is anticipated to grow at the same rate in future years. Approximately 58 percent of Cherriots riders do not have access to a vehicle, compared to 39 percent of neighboring Cherriots riders and 29.4 percent of Lane Transit District's riders.

While economic growth is slowly returning to the Salem-Keizer area, 29.4 percent of the residents of Marion and Polk counties still live below 150 percent of the federal poverty line and are considered "low-income" compared to 24.9% nationally.

Cherriots LIFT service provides complementary paratransit service under the Americans with Disabilities Act (ADA) within the UGB. Cherriots Shop and Ride is a shopper shuttle and dial-a-ride service available to seniors 60+ and individuals with disabilities with no required qualification. Cherriots operates Cherriots Regional providing commuter express and flex-route service in rural Marion, Polk, and Linn counties. Cherriots Trip Choice promotes and coordinates easy and cost-effective transportation options throughout Marion, Polk, and Yamhill counties. It offers information and coordination for carpooling, vanpooling, public transit, bicycling, walking, and telecommuting.

Cherriots serves the largest public and private employers in Salem. These are the State of Oregon offices (21,000 employees) and Salem Health (4,000 employees) respectively. A March 2014 comprehensive service analysis report identified 85% of jobs are located within a quarter mile of any bus stop in Cherriots transit service network. Focusing jobs, housing, and services to best take advantage of the Cherriots transit system ultimately will reduce the need to drive, therefore, enriching the lives of the community.

Cherriots operates local bus service in the Salem-Keizer area. Other services Cherriots provides are Cherriots Regional, Cherriots LIFT, and Cherriots Shop and Ride (see below). In addition to operating service, Cherriots offers travel training to riders and runs the Cherriots Trip Choice program – helping connect riders with



transportation options, including transit, carpools and vanpools, biking, and walking.

### ***Cherriots***

Local bus routes serve local streets in the Salem-Keizer area, providing service within the Salem-Keizer UGB (Figure 1-1).

### ***Cherriots Regional***

Regional express routes provide bus service between towns and cities mostly in Marion and Polk counties. Additionally, Cherriots provides the Polk County Flex, an origin-to-destination service in Dallas, Monmouth, and Independence (Figure 1-2).

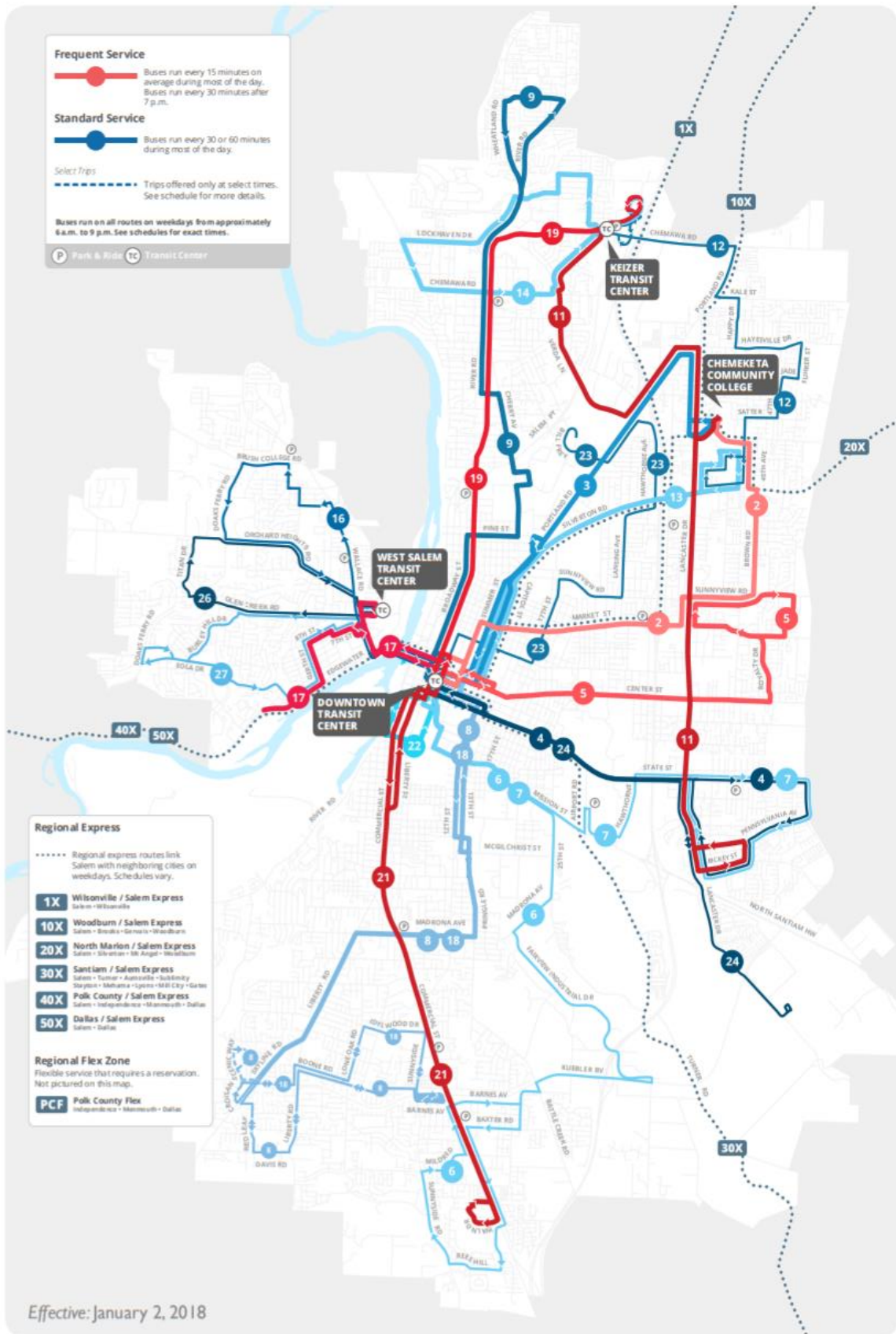
### ***Cherriots LIFT***

Origin-to-destination paratransit service provides rides to those who are unable to access regular bus service. LIFT serves the Salem-Keizer UGB. Riders must be found eligible and trips must be scheduled in advance. During Fiscal Year 2017, Cherriots provided 140,875 LIFT rides. Cherriots Contracted Services Department is part of the Operations Division, which includes Cherriots LIFT, Regional, and Shop and Ride services. The LIFT service is expressed in all caps to distinguish the program name from the vehicle lifts. LIFT is not an acronym. Cherriots operates LIFT service through a contract with a private-sector company, which provides staff for the operation of the vehicles. Cherriots owns and maintains the LIFT vehicles operated by the private company. Cherriots LIFT trips are reserved through the Cherriots Call Center, formerly known as Trip Link, which is also operated by a private-sector company. Cherriots provides the facility and all equipment to the Call Center. Cherriots additionally contracts with a private-sector company for Cherriots LIFT eligibility determinations. Cherriots is responsible for program, contract, and operations management for the LIFT transportation service, Call Center, and LIFT Eligibility.

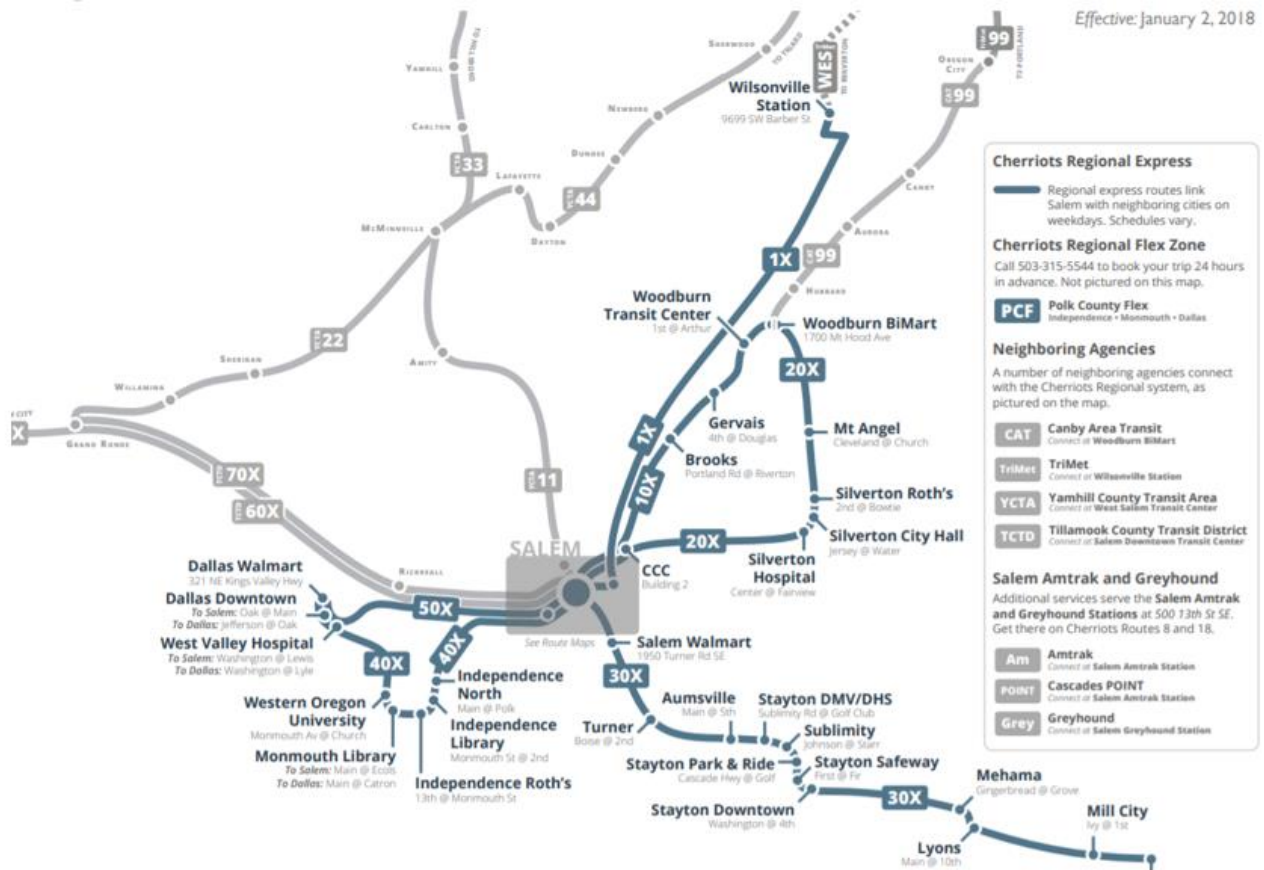
### ***Cherriots Shop and Ride***

Shop and Ride includes both a shopper shuttle and origin-to-destination service for seniors and individuals with disabilities. This service operates throughout the Salem-Keizer UGB, and trips must be scheduled in advance.

**FIGURE 1-1 – Service Area**



**FIGURE 1-2 – Regional Routes**



The Cherriots Maintenance Department is responsible for all aspects of maintaining, servicing, and cleaning of buses and support vehicles for transit services in the Salem-Keizer area. The Maintenance Department is also responsible for the upkeep and repair of Cherriots equipment and facilities, including bus stop signs and passenger shelters. The Maintenance Department strives to provide safe, reliable, and clean buses, using the most efficient and cost-effective maintenance practices, products, and personnel resources.

The primary elements of the Maintenance Department’s function and the means by which it satisfies its responsibilities are described below, as well as descriptions of specific methods and procedures. As can be seen, the Maintenance Department continually seeks to improve operations, equipment, employee performance, and cost savings, thereby, providing the best possible service to the public.

## **2. Fleet and Maintenance Overview**

### **2.1 Management Philosophy and Organization**

The success of the Maintenance Department service in the eyes of our riders is due in large part to our safety, reliability, efficiency, cleanliness, and friendliness of the system. Hence, the continued effort to maintain our fleet in good working order is of paramount importance. Cherrits also ensures all its contractors adhere to this philosophy and that they make it part of their day-to-day efforts.

One of the keys to ensuring the success of our Maintenance Program is preventative maintenance following the schedule established by the original equipment manufacturer, and enhanced where applicable to reflect actual operation experiences. Maintaining vehicles in a state of good repair allows Cherrits to derive the full useful life from our vehicle purchases. Moreover, we are able to reduce conditions and failures which may result in unsafe conditions. Reliability is not just limited to early and timely detection of problems, but is also dependent upon a well-trained staff, ongoing communication between Cherrits staff and contractor personnel, and the general maintainability of equipment.

The Maintenance Plan provides a working outline for Cherrits and its contractors to ensure the overall reliability of the system. Processes have been established to effectively communicate Cherrits goals and objectives.

One key component of mutual communication is information reporting, which allows for Cherrits staff to measure results and identify positive and negative trends through use of various data systems.

Cherrits Maintenance supervisory staff must provide adequate personnel to operate a full schedule of Maintenance services and must ensure employees have a strong commitment to customer service. Moreover, Cherrits Maintenance team members must demonstrate a focus on continuous improvement in operational performance through dedication of local and regional resources.

### **2.2 Maintenance Goal**

To provide efficient and economical maintenance and housekeeping services to allow the fleet, facilities, and support equipment to be used for their intended purposes.

Preventative Maintenance (PM) inspections have a goal of 100% on-time completion. (See Appendix A for the Preventative Maintenance Inspection Reports.)

## **2.3 Maintenance Objectives**

- Complete major vehicle repairs based upon most reliable life cycle, at the lowest cost.
- Identify, design and incorporate improvement projects to reduce and minimize total operating and maintenance costs.
- Operate the facility utilities and fleet in the most economical manner, while providing a high level of reliability.
- Provide a method for easy and complete reporting and identification of necessary repairs and maintenance work.
- Maintain the proper level of spare parts and supplies to support timely maintenance and repairs.
- Accurately track the cost of all maintenance work.
- Schedule all planned work in advance, and allocate and anticipate staff requirements to meet planned and unplanned events.
- Monitor the progress of all maintenance work to successful completion.
- Maintain complete historical data concerning the facilities in general and equipment and components in particular.
- Continually seek workable engineering and technological solutions to maintenance problems.
- Perform daily housekeeping and cleaning functions to maintain safe, efficient, and properly presentable facilities.
- Promptly respond to and repair minor problems in the facilities.
- Maintain bus stops and shelters in a manner that provides a clean, attractive, and safe area for customers.

## **2.4 Bus Stops and Shelters**

Cherriots currently has 650 bus stop signs and 145 passenger shelters in place in our service area. Bus stops and shelters are located, installed, and maintained in

consideration of Cherriots passengers' comfort and convenience.

Graffiti and vandalism to Cherriots bus stops and shelters is removed or repaired as soon as it is reported. Incidents of damage or vandalism are reported to the Dispatch Office by Transit Operators, Operations Supervisors, other agencies, or the public. These reports generate a work order that is logged into a database to track repairs and costs; the work order is given to the Facilities Department for removal or repair within five working days. Repairs for damage to signs or shelters that may cause harm to the public are begun as soon as reported. The type and extent of the vandalism will determine the approach that is taken to remove or repair such vandalism. Paint and pen graffiti can be removed in the field daily by performing scheduled cleaning and trash removal duties. Paint and pen graffiti can be removed with spray vandal mark remover. Etching of shelter panels may be removed by sanding. Broken or damaged panels are moved as soon as practicable to eliminate the possibility of public injury due to sharp or hazardous edges.

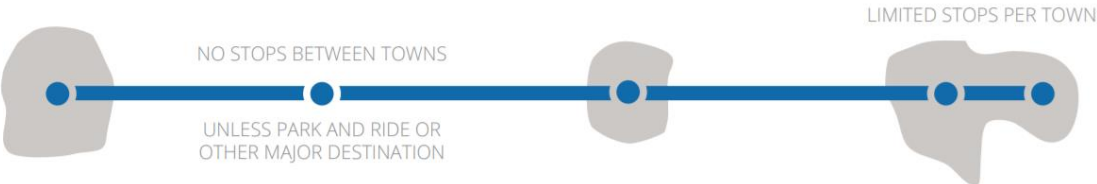
**Fixed-Route Local Bus Stops**

For local bus service, bus stops should be placed about every quarter mile. Research shows this is typically how far riders are willing to walk to access the bus. When access to cross streets is limited, stops can be placed farther apart. All two-way bus service should have a corresponding bus stop in the opposite direction of travel so riders can get off the bus as close as possible to where they got on the bus earlier in the day.



**Regional Express Bus Stops**

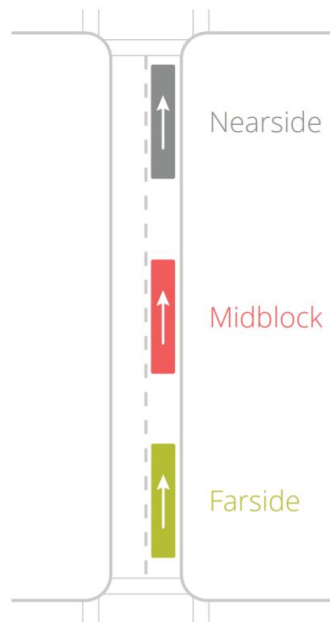
For regional express routes, limited stops should be placed within towns and cities. Unlike local service, the primary point of regional express service is to help riders travel between cities, not within. Typically, stops are placed at major destinations such as shopping centers, universities, and in the downtown core. Stops can also be placed in unincorporated areas if there is a park and ride lot or other major destination.



## Stop Placement

Bus stop placement in relation to an intersection can have an impact on both safety and timing. Below is the preferred order of stop placement:

- Far-Side of Intersection  
Far-side bus stops are located after crossing through an intersection. Far-side placement is preferred because it makes it easier for buses to get back into a travel lane due to gaps in traffic created by traffic signals. However, multiple buses serving a far-side stop at the same time might block an intersection.
- Near-Side of Intersection  
Near-side bus stops are located at the side of the block prior to crossing an intersection. An advantage of nearside stops is that time spent waiting at a red light can overlap time loading and unloading riders. However, there is an increased risk of conflicts with vehicles making right turns.
- Mid-Block  
Mid-block stops experience less pedestrian congestion than the other two stop locations. However, unlike far-side and near-side stops, mid-block stops encourage riders to cross the street in the middle of the block, which is unsafe. Other riders may have to walk long distances to safely cross at an intersection.



In the end, every bus stop has unique circumstances and should be evaluated individually to determine the best and safest placement given conditions on the ground.



## **2.5 Fleet Overview**

### ***Cherriots Local Fixed-Route***

Cherriots entire bus fleet is broken down into the following categories: 35' and 40' low-floor Compressed Natural Gas (CNG) buses, and 35' and 40' low-floor diesel buses. Cherriots maintains an active fixed-route fleet and a contingency fleet for emergency use. The peak requirement for Cherriots Local is 53 buses. Cherriots has a current active fleet size of 64 Cherriots Local buses. Please see Table 2-1 for the exact fixed-route fleet breakdown and Section 2.8 for contingency fleet information.

### ***Cherriots LIFT - Paratransit***

The Cherriots LIFT fleet consists of gasoline-powered, cutaway-style and minivan-style vehicles. All of the cutaway-style bus fleet are lift-equipped and have either three or four securement areas for people using a wheelchair or scooter. Seating for ambulatory customers is a combination of seats fixed to the bus floor and seating that is attached to and can be folded up against the interior wall of the bus, to open floor space for wheelchair securement. Ambulatory seating varies by sub-fleet, with a seated maximum of 13 and a minimum of 6. The number of seats available for ambulatory customers depends on the number of wheelchair spaces occupied. The minivan-style fleet of 8 ramp-equipped vans seats a maximum of 3 ambulatory customers or 1 customer using a mobility device, and is useful when the pick-up location or the drop-off location presents access challenges for the small buses. Cherriots LIFT has a current active fleet size of 43 paratransit buses. The peak requirement for Cherriots LIFT is 37 buses. Please see Table 2-2 for the exact Cherriots LIFT paratransit fleet breakdown and Section 2.8 for contingency fleet information.

### ***Cherriots Regional***

The Cherriots Regional fleet consists of 12 vehicles, 8 medium-duty buses and 4 cutaway-style vehicles. Regional buses are equipped with wheelchair lifts. Ambulatory seating varies by vehicle size with a seated maximum of 28 and minimum of 3. The number of seats available for ambulatory riders depends on the number of mobility device spaces occupied. Cherriots Regional has a current active fleet size of 11 buses. The peak requirement for Cherriots Regional is 12 buses. Please see Table 2-3 for the exact Cherriots Regional fleet breakdown and Section 2.8 for contingency fleet information.

### ***Cherriots Shop and Ride***

The Cherriots Shop and Ride fleet consists of 5 vehicles: 3 cutaway-style and 2 minivan-style. Shop and Ride buses are equipped with wheelchair lifts. Ambulatory seating varies by vehicle type and size with a seated maximum of 13 and minimum of 3. The number of seats available for ambulatory riders depends on the number of



mobility device spaces occupied. Cherriots Shop and Ride have a current active fleet size of 5 buses, with 1 spare. The peak requirement for Cherriots Shop and Ride is 4 buses. Please see Table 2-4 for the exact Cherriots Shop and Ride fleet breakdown and Section 2.8 for contingency fleet information.

### ***Cherriots Support Vehicles***

Cherriots Support Vehicle fleet consists of sedans, SUVs, trucks, and minivans. There are 18 Cherriots Support Vehicles currently.

### ***Software Programs***

The Maintenance Department currently operates using FleetNet for its fleet maintenance and parts inventory control. It also interfaces to our run-cutting software Trapeze. The Maintenance Department also uses FleetNet to compile and generate reports to compute budgetary and expense information, track road call summaries, and for tracking mileage data.

Cherriots uses FuelServe (FuelSource) for vehicle fueling which also an authorized employee to use an assigned card or their employee number to complete a fueling transaction.

## **2.6 Service Overview**

For the fiscal year 2017, Cherriots Local routes averages 2,044,465 revenue miles. The paratransit fleet averages 752,523 revenue miles. Vehicles are in operation approximately 6:00 a.m. to 9:00 p.m.

Time spent outside of revenue operation is used for performing all necessary service, cleaning, and maintenance to the vehicles. The Cherriots Dispatch Office is open 3:30 a.m. to 10:30 p.m., Monday-Friday, and is responsible for assigning replacement vehicles when needed, in accordance with the available vehicle list from the Maintenance Department. Expanded service hours are to be determined. Before service operation, all vehicles are given a pre-trip inspection.

Defects found upon completion of the pre-trip inspection are recorded on the DVIR. (See Appendix B for the DVIR). Dispatch is notified of any defects that render the vehicle unusable. Defects are resolved by the Maintenance Department when the vehicle is no longer in revenue operation.

The LIFT Program operations model consists of manifests being created based on the trip requests received in the Call Center. The manifests are electronically provided to the company that operates the LIFT service. Manifests are then assigned to a vehicle and completed by an Operator. Both the Call Center

contractor and the LIFT operations contractor respond to customer contacts. All LIFT maintenance is performed by Cherrlots Maintenance Department employees, excluding minor maintenance activities specifically outlined as responsibility of the LIFT contractor. Cherrlots has general program and operations direction and oversight responsibility.

## 2.7 Existing Bus Fleet

All vehicles in operation are wheelchair accessible and adhere to ADA compliance standards.

Table 2-1, Cherrlots Local Fixed-Route Fleet, provides detailed information on the vehicles used for fixed-route revenue operations.

**TABLE 2-1 - CHERRIOTS ACTIVE LOCAL FIXED-ROUTE FLEET (as of 5/4/18)**

FLEET NBR	FY BUILT	BUS LENGTH	FLEET SIZE	FUEL TYPE	BUS MAKE & DESCRIPTION	AGE END FY 2019
101-112	2002	35	12	CNG	Orion 7	17
201-212	2002	40	12	CNG	Orion 7	17
213,214	2004	40	2	CNG	Orion 7	15
115,122	2005	40	8	BD	Gillig	15
215-222	2008	35	10	CNG	Orion 7	11
223-226	2008	40	4	BD	Gillig	11
227,234	2011	40	8	BD	Gillig	8
123-126	2011	35	4	BD	Gillig	8
127-130	2012	35	4	BD	Gillig	7
1801-1806, 1851-1856	2019	35/40	12	CNG	Gillig	0
TBD	2020	35/40	14	CNG	Gillig	0
TBD	2021	35/40	8	CNG	Transit	0

Table 2-2, Cherrlots LIFT Paratransit Fleet, provides detailed information on the vehicles used for paratransit operations.

**TABLE 2-2 - CHERRIOTS LIFT PARATRANSIT FLEET (as of 5/4/18)**

FLEET NBR	FY BUILT	BUS LENGTH	FLEET SIZE	FUEL TYPE	BUS MAKE & DESCRIPTION	AGE END FY 2019
857-861	2007	22	4	GAS	Champion	12
827-831	2008	22	5	GAS	Elkhart	11
V1655	2008	15	1	GAS	Minivan	11
832,833	2009	22	2	GAS	EK Coach	10
834-837	2010	22	4	GAS	Startrans	9
838-854	2011	22	16	GAS	Startrans	8
862-865	2013	22	4	GAS	Arboc	6
1401-1403	2014	15	3	GAS	MV-1	5
1404-1407	2015	22	4	GAS	MV-1	4
TBD	2019	22	5	GAS	Glaval	0
TBD	2020	22	12	GAS	Cutaway	0
TBD	2021	22	15	GAS	Cutaway	
TBD	2022	22	4	GAS	Cutaway	

Table 2-3, Cherrlots Regional, provides detailed information on the vehicles used for regional operations.

**TABLE 2-3 - CHERRIOTS REGIONAL FLEET (as of 5/4/18)**

FLEET NBR	FY BUILT	BUS LENGTH	FLEET SIZE	FUEL TYPE	BUS MAKE & DESCRIPTION	AGE END FY 2019
353-354	2004	33	2	Diesel	Freightliner	15
355-357	2006	34	3	Diesel	Freightliner	13
304	2009	25	1	GAS	Ford 450	10
305	2010	25	1	GAS	Ford 450	9
358-359	2010	33	3	Diesel	Champion	9
360	2010	33	1	Hybrid	International	9
307	2012	24	1	GAS	Ford 450	7
TBD	2018	35	3	Diesel	Bluebird	1
TBD	2020	35	2	Diesel	TBD	

Table 2-4, Cherriots Shop and Ride Fleet, provides detailed information on the vehicles used for paratransit operations.

**TABLE 2-4 - CHERRIOTS SHOP AND RIDE FLEET (as of 5/4/18)**

FLEET NBR	FY BUILT	BUS LENGTH	FLEET SIZE	FUEL TYPE	BUS MAKE & DESCRIPTION	AGE END FY 2019
503,503	2007	22	2	GAS	Champion	12
504	2010	22	1	GAS	Champion	9
550,551	2010	15	2	GAS	Minivan	9
TBD	2019	22	1	GAS	Eldorado	0
TBD	2020	22	1	GAS	TBD	

## 2.8 Contingency Fleet

### Contingency Fleet Service Requirements

As of 2018, Cherriots does not maintain a contingency fleet; however, the District has a plan in place for such time a contingency fleet is established. The Cherriots contingency fleet will consist of vehicles that have already reached the end of their useful life and are no longer needed for normal scheduled service. A contingency fleet will be maintained under the following circumstances:

- Restoration of previously reduced service.
- Major temporary, dedicated service events such as construction or other interruptions to regular service.
- Major service emergency conditions, like declared natural disasters such as major region-wide flood or winter storm, resulting in a temporary surge for Cherriots ridership demand, or possibly damage to regular active fleet buses requiring temporary substitution of contingency buses for regular buses until the regular buses can be returned to service.
- Sudden surge in Cherriots ridership demand due to national or regional fuel emergencies.

Cherriots shall send a letter of notification to the FTA should there be a need to fully reactivate a contingency bus for active service.

## Contingency Fleet Maintenance

At the time Cherriots establishes a contingency fleet, contingency buses will be removed from normal scheduled maintenance and put into a Contingency Bus Inspection (CBI) program, which is performed every 90 days. CBI inspections consist of: brake adjustments, air, electrical, throttle, interlock system operation check and fluid level check for all contingency buses.

## 2.9 Operating Spare Ratio

### *Fixed-Route*

Bus Maintenance's current standard is to maintain at or below a 20% spare ratio to assure vehicle availability, optimize maintenance costs, and is based upon PM peak pullouts. This ratio calculated for 35' and 40' buses only.

### *Paratransit*

The goal for Cherriots LIFT service delivery is to maintain above a 16% spare ratio, which is based upon average peak pullouts. As of March 2018, the maximum peak pullout was 31 vehicles.

## 2.10 Current Maintenance Staffing

The Cherriots Maintenance Department currently has 34 employees that include: Department Manager, Vehicle Maintenance Supervisors, Facilities Maintenance Supervisor, Journey Mechanics, Service Technicians, Service Workers, Facilities Maintenance Workers, Procurement Assistant, Parts and Supplies Clerk, and Staff Assistant. Department personnel may work any of four (4) shifts over a five-day period, performing varied tasks.

Cherriots Maintenance employees operate on a 22-hour, five-days-a-week work schedule. All shifts are staffed to accommodate scheduled PM and fleet modifications, as well as unscheduled repairs when vehicles are out of operation. Shifts are scheduled so there is an overlap between shifts for continuity of operation. Table 2-5, Cherriots Maintenance Employee Shift Distribution, illustrates employee distribution by shift.

TABLE 2-5 – Cherriots Maintenance Employee Shift Distribution

POSITION	DAY	SWING	NIGHT	*OTHER
Journey Mechanic	5	4		
Service Technician	3	2		
Service Worker	3	3		
Facilities Service Worker	4	3		
Procurement Specialist	1			
Parts and Supplies Clerk	1			
Maintenance Supervisors	1	1		
Maintenance Training Supervisor	1			
Maintenance Administrative Assistant	1			
Maintenance Manager	1			

## **2.11 Employee Performance**

Cherriots has an annual performance appraisal program using forms that are periodically revised to better address performance criteria and to improve the quality of the appraisal. Training is also provided to supervisors to assist them in the process and outcome. Cherriots subscribes to a positive corrective action approach, as well as a progressive discipline program in addressing performance deficiencies. Employees are recognized and rewarded for system-improving suggestions and ideas.

Training is regarded as an essential element in our effort to improve maintenance productivity. Maintenance training is directed toward developing and upgrading skills necessary for proper vehicle maintenance, equipment modification, system procedures, and new equipment orientation. The program also focuses on management to enhance leadership skills and supervisory practices to increase productivity levels and maintain a responsible maintenance environment. In-house training consists of both classroom and on-the-job training. Equipment and product vendors periodically hold seminars and training sessions at Cherriots facilities.

## **2.12 Maintenance Performance Indicators**

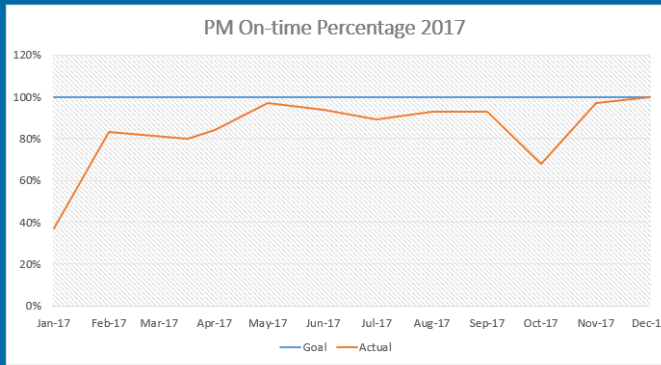
### ***Fixed-Route***

Each year, the Maintenance Department identifies goals critical to successful performance of the fixed-route fleet. Vehicles must be reliable, clean, safe, and accessible for both internal and external customers, and annual goals are directed at meeting those standards in a cost- effective manner. A monthly benchmark report tracks the ability of the Maintenance Department to meet its goals. There are two targets for fiscal year 2017-2018:

1. Overall miles between major mechanical failures is 9,000 miles or greater.
2. PM compliance is at 100 percent or greater.

Previous goals have focused on overtime costs, spare ratio, preventive maintenance, on-time compliance, maintained pullouts, frequency of interior cleaning and steam cleaning, and repair to payroll hour ratios in addition to attendance, inventory value, cost per vehicle mile and road call mileage (Figures 2-1). When goals are consistently met, they become a regular part of operations and other goals are introduced.

Figure 2-1. Cheriots PM On-time Performance



\* Jan-17 >40%: Due to significant weather episodes.

Figure 2-1. Cheriots Cost Per Mile Diesel Fleet

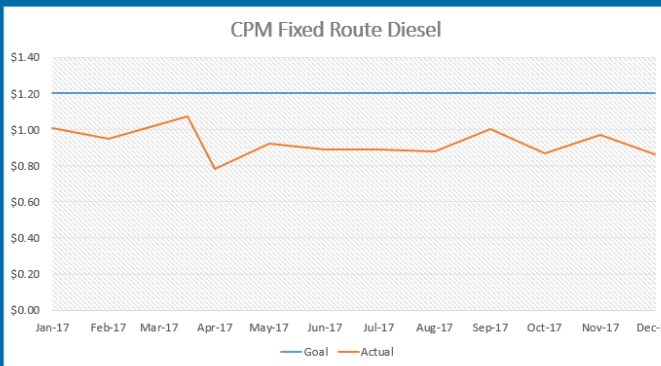


Figure 2-1. Cheriots Cost Per Mile CNG Fleet

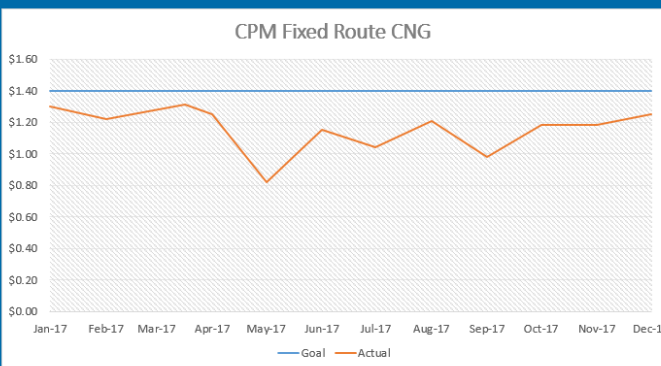
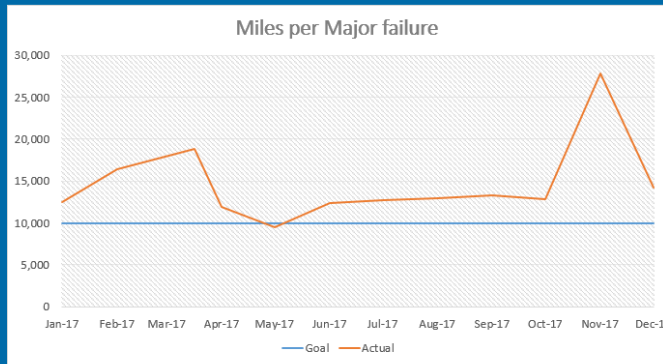


Figure 2-1. Miles per Major Mechanical Failure Fixed Route



## 2.13 Scheduled Maintenance

### ***Fixed-Route***

All local fixed-route, LIFT, Regional, and Shop and Ride vehicles are scheduled for regular preventive maintenance. Preventive maintenance schedules vary in accordance to the system on which the maintenance is performed. Inspection procedures vary slightly depending on the model and make of the vehicle and its components.

### **General Preventive Maintenance**

- 'A' Inspection – Oil change, oil sample, engine pressure wash interior/exterior inspection, chassis lubrication, brake inspection, differential fluid level reading, farebox inspection.
- 'B' Inspection – 'A' inspection, plus wheelchair lift inspection, and transmission sample.
- 'C' Inspection – 'B' inspection, plus engine valve adjustment, air conditioning inspection, air system serving, and CNG tank inspection (if equipped).
- 'D' Inspection – 'C' inspection, plus valve adjustment, cooling system service, transmission service, air cleaner replacement, pack wheel bearings, and hydraulic and differential fluid change.

The schedule for general preventive maintenance varies by fleet and/or engine manufacturer. Anytime drive train fluid is removed, oil analysis is used to determine the optimum extended oil change interval. The interval for each type is listed in Table 2-6, General PM Intervals.

TABLE 2-6 – General PM Intervals Rotation A,A,B,A,A,C,A,A,B,A,A,D

MODEL YEAR	BUS SERIES	A	B	C	D
2002	101-112, 201-212	6,000	18,000	36,000	72,000
2004	213,214	6,000		12,000	24,000
2005	215-222	6,000		12,000	24,000
2008	113-122 223-226	6,000		12,000	24,000
2011	123-126, 227-234	7,000		14,000	28,000
2012	127-130	6,000		12,000	24,000
2001	2501-2560	7,000		14,000	28,000
1998	2259-2318	7,000		14,000	28,000
1998	2201-2258	7,000		14,000	28,000
1997	2101-2165	7,000		14,000	28,000
1997	2101-2165	7,000		14,000	28,000
1997	2001-2022	6,000		12,000	24,000
1992	1901-1910	12,000		24,000	48,000
1992	1701-1808	10,000		20,000	40,000
1991	1631-1643	12,000		24,000	48,000
1990	1601-1630	12,000		24,000	48,000
1990	1401-1463	12,000		24,000	48,000

### Transmission Preventive Maintenance

- During ‘T’ Inspection (every 18,000 miles) – Visual inspection, fluid drain and filter change, record fault codes, ATF sample and road test for proper shifts and retarder functions.
- ‘LR’ Inspection (every 72,000 miles) – ‘L’ inspection, plus pan drop for metal and clutch check, and operating pressure check, along with fluid replacement.

### Engine Preventive Maintenance

- ‘E’ Inspection (every 50,000 to 75,000 miles, depending on fleet) – Manual and electronic idle and valve checks and tune-up inspection.

### Air Conditioning Preventive Maintenance

- ‘ACB’ Inspection (every 24,000 miles) – ‘ACA’ inspection, plus clutch bearing lubrication, pressure and temperature check, and filter replacement.
- ‘ACC’ Inspection (every 48,000 miles) – ‘ACB’ inspection, plus compressor area steam cleaning, voltage/amperage readings from motors, and compressor operating efficiency tests.

### Brake Preventative Maintenance

- PM Inspections are performed on brakes every 6,000 miles.
- Brakes efficiency is checked with an electronic brake de-accelerometer after any brake repair work and for driver complaints. There must be a 50% efficiency rate at 20>MPH.



- Application valve, parking brake valve, and relay valves are checked for leaks and performances at 6,000 mile intervals and rebuilt or replaced, as needed.
- Moisture ejector valve is rebuilt and desiccant cartridge is changed, as needed.
- Major brake overhaul intervals occur at an average of every 100,000 miles, because buses are equipped with retarders. Overhauls include the following:
  - Relining
  - Drums turned
  - All seals replaced
  - Worn and damaged components checked and replaced
  - S-Cam and bushings inspected and replaced, as necessary
  - Wheel bearings cleaned and repacked and new seals installed
  - Bus is test driven and checked with brake meter
  - Non-asbestos lining is used on all reclining

### **Differentials Preventative Maintenance**

- Done in conformance with manufacturer's suggested service intervals.
- Gear oil changed at 72,000 PM.
- Life expectancy at 350,000 miles.

### **Cooling System Preventive Maintenance**

- Cooling systems are maintained by providing a source of anti-freeze and water in the bus wash for topping up, as needed.
- The coolant is changed on a 2-year cycle, assuring the coolant is at the proper protection level using both anti-freeze and an additive package.

Coolant filters permeated with Nalcool are utilized.

- Repairs to the system are on an as-needed basis. Adding to the cooling system is monitored by the fueling sheets, which indicate coolant usage by coach on a daily basis.

### **Wheelchair Lift Preventive Maintenance**

- 'WLR' Inspection (every 12,000 miles) – Clean platform, check ride and step height, inspect system for leaks, and lubricate all moving parts.
- 'WLX' Inspection (every 48,000 miles) – 'WLR' inspection, plus fluid and filter change.

### **Restraints**

- All vehicles are equipped with a Q-Straint 4-point wheelchair restraint system.

### **Other Preventive Maintenance**

- 'FB' (Farebox) Inspection (annual inspection) – Coin mechanism, bill transport, coin escrow, bill stuffer, logic board, and lock inspection, lube, adjust, and bulb replacement, as needed.
- 'CAM' (Camera System) Inspection (every 12,000 miles) – Procedural check of all cameras, data packs and data recorders.
- 'CBI' (Contingency Bus) Inspection (every 90 days) – Brake adjustments, air, electrical, throttle, and interlock system operation check, and fluid level check for all contingency buses.

### **Oil Sampling**

Oil samplings are taken at each oil change. In addition to determining oil and filter service intervals, sampling provides specific data on the levels of contamination present, such as coolant, soot, or high metal content.

Transmission and differential samples are taken if problems are suspected. The most recent result of sampling is studied by management and placed in a file for each engine. Appropriate preventative steps are taken, and repairs are performed, as necessary.

Sampling of bulk supplies at the time of delivery is taken periodically to ensure quality and consistency.

### **Electrical Component Rebuild**

Electrical components are rebuilt on an as-needed basis or as bench work, time permitting. Starters, motors, relay boards are checked to determine what is needed. Personal computer boards are repaired or replaced as needed. Typically, alternators and starters are sent out for rebuild. Armatures are turned and cleaned, brushes are replaced, coils are repaired or replaced, and new bearings and seals are installed.

### **Farebox Maintenance**

Electronic registering fareboxes are regularly maintained and repaired, as needed. A designated area is equipped with the necessary electronic repair equipment to do all repairs and adjustments in-house. Fareboxes are probed each night and cashboxes emptied twice a week. Maintenance reports are monitored for problems.

### **Communications, Electronics, and Security Equipment**

All buses in the fleet are equipped with Digital Recorder (DRI) Voice Announcing Systems, an automatic announcement system, triggered by GPS technology.

All buses are equipped with surveillance cameras to record activity within the coach. The system has an 'event' button, which preserves a recorded period, as well as an impact sensor.

Setup and troubleshooting is performed as the new buses arrive. Subsequent repairs are performed on an as-needed basis, with the aid of Original Equipment Manufacturers (OEM) and by qualified in-house staff.

### **Upholstery Repair**

Seat coverings are repaired on an as-needed basis. Graffiti is removed immediately upon discovery. The Maintenance Department performs all repairs and re-upholsters in-house.

### **Bus Towing**

Emergency repairs are made at the site of failure if the responding mechanic determines it can be done safely and efficiently. All towing is done by an outside towing service.

## **Daily Vehicle Inspections (DVI)**

DVI books are supplied on all buses. There are two books on each bus. One book reflects the prior 30-day pre- and post-trips, along with defects that have repairs signed by Maintenance staff. The second book is the current book that contains the most recent defects and repairs.

DVIs are delivered to the Maintenance facility nightly after the runs are completed. All write ups are checked out before the bus is returned to service. Depending upon the severity, some may be repaired immediately, while others may be deferred to a later date or determined unjustified.

DVIs are filed for reference and retained in accordance with the archive retention schedule.

A process has been developed that allows Maintenance to correspond to the Operators on all repairs completed.

## **Tires**

Cherriots currently has a tire lease Agreement with Michelin. This Agreement include tires for the Cherriots and Cherriots LIFT services.

The Maintenance Department personnel perform all mounting, dismounting, and minor repairs to the tires. The tires are branded with an identifying number that is used to track the tire throughout its life using the FleetNet tire module. Air pressure and tread wear checks are performed weekly on the fleet.

- Front
  - Tires are removed at 8/32' to use at a rear tire position.
  - 4/32" tread depth minimum on any major tread groove on front axle.
  - A front end alignment is performed whenever abnormal tire wear exists.
  - Toe in is checked every 36,000 miles.
  - These tire casing are recapped once and used on the rear.
  
- Rear
  - 2/32" tread depth minimum on any major tread groove on the rear axle.
  - Sidewalls are monitored for curb scuffing.

- Tire pressure, wear and tread depth.
- Each week every tire is checked.
- Minimum tire pressure is maintained for maximum tire life, as recommended by tire manufacturer.
- Wheels
  - Checked for cracks during mounting and painting.
  - Sandblasted, inspected and repainted when a new tire is installed.

## **Inventory and Parts**

The parts inventory consists of approximately 2,700 different line items.

Inventory is stocked in five locations:

- Parts Room for smaller, fast-moving items
- Receiving area for large, bulky items
- Tire Room for tires and wheels
- Mezzanine area for body panels, glass, and slow-moving items
- Maintenance Shop and Fuel Island for oil and anti-freeze barrels

Parts are recorded in inventory and the computerized inventory system by:

- Major component classification
- Part number
- Location
- Bin location

Physical inventory is taken at the end of each fiscal year. Physical inventory counts are handwritten on computer-generated count sheets by location. An employee, who is not a member of the counting team, then enters the counts into the computer. Upon completion of the physical inventory, a computer printout is made of the total parts inventory valuation. This inventory valuation, together with the original count sheets and "issued/receipts" location sheets, are turned into the Operations Division. The Operations Division, which has kept a separate inventory count during the year, then reconciles and makes the necessary adjustments. This process is done in June of each year, and is monitored by an auditor who ensures the validity and accuracy of the inventory process and its resulting figures.

## **Parts Issues**

All parts issued are entered into the computerized inventory system. The Repair Order form provides the data for entering parts issued, as well as labor associated with the vehicle repairs. The parts inventory is automatically adjusted by charging out the part from the inventory to the repair order. This is done by data entry in the Fleetmate computer program. The labor hour portion of the repair order records all labor segments for each repair performed, thereby completing the total repair cost on that repair order.

## **Parts Receipts**

Cherriots purchase order with the vendor packing slip, or invoice, provides the necessary data for the parts receipt transaction. Information included on these documents includes:

- Vendor name
- Date of order
- Date received
- Part number
- Quantity
- Unit cost
- Total cost

The date parts are received is noted on the packing slip, as well as the receiving clerk's signature.

## **Shop Purchasing**

Cherriots purchase order is issued to procure shop parts, goods, and services. The purchase order is coded with an appropriate Divisional budget number for each item procured. All procurement action is initiated by a requisition, which is reviewed and approved by the Maintenance Manager.

For individual parts, goods, and/or services in excess of \$2,000.00, at least three supplier quotations must be solicited and submitted with an approved requisition prior to approval of a purchase order. The criteria used in soliciting quotes for Maintenance Shop parts and supplies are: best quality, best cost, timely delivery. Prior to any purchase, all applicable supplier catalogs are consulted.

Diesel and gasoline fuel is purchased via spot pricing using four different fuel vendors. Diesel and gasoline purchases are made on an as-needed basis.

## Warranty Procedures

*Currently, SAMTD does not have any vehicles in service that have remaining factory warranty. Only component warranties are in effect.*

Warranty claims vary by supplier and the nature of the product. Claims are processed in a variety of ways: warranty service orders, phone calls, faxes, and meetings with supplier representatives, until a satisfactory settlement has been received. Warranty claims are recorded prior to submission to the manufacturer. While most repairs are performed by the manufacturer's staff or by other qualified representatives, Maintenance staff track labor hours for work they perform on warranty items. The manufacturer typically supplies replacement parts.

When a warranty payment is received during the same fiscal year as the original payment, the amount is credited back to the same account charged when the original payment was made. Copies of original invoice and entry sheet are used as back-up.

When components on vehicles fail, a Maintenance Mechanic reviews the components history via FleetNet. If there is a possibility of warranty existing, the component is given to the Parts Department for further investigation.

If warranty exists, the supplier is contacted and the item is logged on the warranty tracker. When the claim is complete, the results are also logged. In most instances, SAMTD is issued a replacement part. Some instances such as batteries, the item is prorated or a credit is issued.

If the vendor issues a credit memo, once it is received, it is posted back to the same purchase order/invoice/account number that the original payment was made against.

Core charges when paid are charged to a separate account line item. Cores returned are credited back to this account. This account is reconciled to ensure all credits and charges are accurate.

Typical warranties include:

- Propulsion Systems
  - Engines
  - Transmissions
  
- Subsystems
  - Wheelchair ramps, dryers, and door systems

- Brake systems, heating, ventilation, and air conditioning
- Air compressors and starters/alternators
- Destination signs, digital recorders, radios
- Surveillance cameras
- Batteries

### ***Paratransit***

The paratransit fleet has a two-level preventive maintenance inspection program: 'A' level service every 5,000 miles for minivans or every 6,000 miles for LIFT buses, and 'B' level service every 30,000 miles for all LIFT revenue vehicles. As with fixed-route inspections, the 'B' service is more progressive than the 'A' service. These consist of eight service sections:

1. Test drive – Inspection includes: starter, warning devices, dashboard gauges, interior lights and switches, steering wheel play, fast idle switch, heater, air-conditioner, horn, fire extinguisher, seatbelts, wipers, parking and foot brakes and interlock, and record engine rpm and oil pressure.
2. Under chassis and lube – Inspection includes: steering assembly and U joints, kingpins and tie rods, front axle assembly, sway bars and linkage, springs and shocks, brakes, drums, wheel seals, driveshaft, differential, drain transmission fluid/replace filter/refill, fuel tanks and lines, frame and cross members, and lube complete unit.
3. Service – Inspection includes: exterior lights, windshield cleaner fluid, condition of wiper blades and arms, mirrors, body condition, bumpers/mud flaps/brackets, headlamps, take oil, coolant and transmission fluid samples for analysis, coolant, drain fuel/water separator and crankcase, and replace fuel and oil filters.
4. Upper chassis, engine and electrical – Inspection includes: exhaust system, power-steering fluid, fan shroud, water pump, belts, AC compressor, alternator, air-intake filter, and batteries.
5. Engine inspection (with engine running) – Inspection includes: recording oil pressure, filters, lines and gaskets, exhaust, and fault codes.
6. Wheelchair lift (ramp on minivans) – Inspection includes: operation, lube, check for loose hardware and fluid leaks, and warning buzzer.
7. Tires and wheels – Inspection includes: record tread depth and tire pressure, visual inspection for wear or damage, and wheel nuts and axle flange nuts.



8. Final inspection – Inspection includes: check engine oil level, check for additional PM to be performed, and update PM sticker.

Through oil analysis, the 6,000 mile PM interval was deemed too long for vehicles equipped with the Ford 6.0 motor. A new PM measure (“1OF”) was implemented to change the oil and filter at 3,000 miles to combat fuel dilution occurring in the oil due to the specific duty cycle of a shuttle bus, which includes an inordinate amount of idling.

## **2.14 Scheduled Predictive Maintenance**

### ***Fixed-Route***

Predictive maintenance is performed on components that have exhibited a determined lifetime. Components are identified for predictive maintenance in accordance with their frequency of unscheduled repairs. Component replacement history by fleet type is statistically reviewed to determine the optimum replacement schedule. Cherrlots currently has numerous components on a predictive maintenance schedule: air dryers, brake application valves, brake relay valves (front and back), air compressors, alternator bearings, fuel pumps, water pumps, turbochargers, operator seats, diesel particulate filters, DEF filter, air cleaners, interior cabin filters, Amorex fire suppression actuators, some transmissions, suspension airbags, windshield wipers, fuel injectors, electric starters and engine thermostats.

Cherrlots is always evaluating and identifying bus components that could be placed on a predictive replacement interval.

### ***Paratransit***

There is no scheduled predictive maintenance program currently in place for the LIFT fleet.

## **2.15 Unscheduled Maintenance**

### ***Fixed-Route***

Unscheduled maintenance is classified into four categories: Road calls, pullout repairs, operator reported defects, and yard/field repairs.

- Road call repairs: A repair where a disruption of service has occurred or a vehicle is traded out of service due to mechanical, or safety concerns.
- Pullout repairs: Problems with a vehicle, typically minor mechanical or

safety issues, that are found by the Operator that must be fixed before the vehicle is put into service.

- Operator reported defects: Problems with a vehicle that do not warrant a disruption of service and are mainly comfort, cosmetic, or minor mechanical issues.
- Field repairs by downtown mechanics and yard repairs: Repairs done to the vehicle within the yard confines, typically for cosmetic or minor mechanical issues at fixed locations or transit centers.

All unscheduled maintenance is entered into the FleetNet and corrective actions to remedy the problem are recorded. Those that are safety-related or likely to result in a road call, are repaired before being returned to service. Defects not falling into the above categories, but not able to be repaired immediately, are deferred and scheduled for further repairs at a later date.

### ***Paratransit***

Unscheduled maintenance is identified on the fleet of LIFT vehicles: at the time of the Operator's pre-trip inspection before pull-out, during service when a road call or vehicle tow is required, and in response to a written Operator defect report submitted to Maintenance. Safety- and maintenance-related issues that do not allow for safe operation of a vehicle, are repaired before the vehicle is used to deliver service. LIFT utilizes FleetNet to save all repair history in regards to vehicles.

## **2.16 Cleaning Program**

### ***Fixed-Route***

During the nightly service process, where buses are refueled and have their fluids checked, each interior is cleaned to remove dust, trash, etc., before being run through a wash rack for exterior cleaning. In addition, floors are mopped, as needed, but no less than once per week. Wheels are cleaned regularly, at no less than once per week.

### ***Paratransit***

Cleaning of buses is part of the transportation providers' contract. Operators daily sweep out buses, remove trash from vehicles and spot clean windows, surfaces and floors, as needed. The transportation provider contracts with a vendor who performs thorough interior cleaning and exterior cleaning.

## **2.17 Bus Maintenance Facilities**

### ***Fixed-Route***

Bus Maintenance is headquartered at 3140 Del Webb Avenue, Salem, Oregon. The Del Webb facility was built in 1968, and has undergone several remodels and additions. Fleets consist of 35' and 40' buses. Bodywork is contracted by local vendors. Transmissions needing rebuilt are sent to vendors for repairs. All other repairs are performed in-house. Cherriots Facilities Department maintains the bus garages.

### ***Paratransit***

LIFT operations is located at 2195 Hyacinth Street NE, Salem, Oregon. All vehicle maintenance (excluding identified light maintenance items: replacing headlights, taillights, wiper arms and blades, adding washer fluid and topping off engine oil/transmission fluid) is performed at the Maintenance facility. Buses are transferred from their operating base to the Maintenance facility for necessary preventive maintenance and repairs. Body damage repairs are done by outside contractors. LIFT maintenance has 10 bus bays equipped with lifts.

# **3. Fleet and Fleet Management**

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## **3.1 Quality of Service – Fixed-Route and Paratransit**

Connecting people with places through safe, friendly, and reliable public transportation services is a key element to the Cherriots system. Safe, frequent, reliable and comfortable service on modern vehicles is fundamental to improving service quality and attracting new riders. Cherriots will maintain and improve the quality of its transit service as described below.

### **Safety and Security**

Ensuring safe operation of transit service and safe design of transit facilities and equipment is embedded into all Cherriots activities. Similarly, all Cherriots employees serve as 'eyes and ears' for security awareness.

- Procurements and construction of new buses and facilities include safety requirements in design and performance specifications, which are verified in design reviews and testing. Safety hazards are formally identified, assessed, and resolved as part of developing specifications and designs. Acceptance testing against safety-related design and performance requirements is formally performed and documented. Certification that all safety design requirements have been met, as well as the following operational safety requirements, is required before completed facilities and equipment are placed into passenger service. Standard Operating Procedures (SOPs) govern all operations, to assure safety and quality.
- Safety training for employees is formal and documented, specific both to job classification and the specific equipment or facility involved.
- Emergency response drills are conducted periodically.
- Every accident is analyzed for preventability, with lessons learned implemented by improvements to procedures, training, or equipment, as appropriate.
- Safety audits are performed on an ongoing basis, and the Federal Transit Administration (FTA) performs safety program oversight.

Security programs include:

- All Cherriots employees serve as 'eyes and ears' for security awareness and reporting.
- Security procedures assure rapid and assured communication and response to a reported security situation. Cherriots Dispatch works closely with 9-1-1 dispatch centers to assure the fastest possible police or emergency response.
- Cherriots buses have security cameras onboard.

### **Frequency and Levels of Service**

Service frequencies often reflect the demand for service; however, Cherriots understands the importance of frequency as it applies to quality of service. Frequent service contributes to ridership in several ways:

- It reduces actual and, even more substantially, perceived travel time by transit.
- It makes the need to transfer less onerous. Given contemporary multi-destination travel patterns, Cherriots cannot connect all the origins and destinations with direct service. If the transfer wait time is short and the transfer environment is good, customers will be much more willing to transfer.
- It makes transit convenient, an essential element in attracting more trips.

## **3.2 Reliability**

On-time performance is the measure of how close a bus adheres to its schedule. Schedules are designed to give riders certainty about when their bus will depart so they can make informed decisions about when to travel.

However, it is difficult to predict exactly when a bus will arrive at every bus stop due to changing conditions on the ground, fluctuations in traffic, number of mobility devices, etc. As a result, on-time performance is measured only at bus stops with scheduled departure times, known as time points. Additionally, buses are considered 'on time' if they depart up to five minutes late from their time points. On-time performance is measured on the route level and system level, both for the entire day and the PM peak (2:00 p.m. – 6:59 p.m.)

At least 85% of buses should depart time points no more than five minutes late (75% in PM peak). No more than 10% of buses should depart their time points between five and 10 minutes late (15% in PM peak). No more than 5% of buses should depart their time points more than 10 minutes late (10% in PM peak). No buses should depart their time points before their scheduled departure times.

### **3.2.1 On-Time Performance**

#### ***Fixed-Route***

A bus is considered on time if it arrives at the published schedule time, but not early, or is less than five minutes after its scheduled departure time. Information on bus arrival times is regularly collected and summarized at least twice a year. The goal is for at least 85 percent of all bus trips arrive at time points 'on time' during an average weekday.

#### ***Paratransit***

A LIFT ride is considered on time if the vehicle arrives within a 30-minute window that is given to the customer at the time the ride is reserved. The on-time standard for Cherriots LIFT is 98%. Cherriots establishes a 95% goal for on-time arrival for the Cherriots LIFT service.

### **On-Street Improvements**

Traffic preferential improvements along roadways that help improve the reliability of bus service include:

- Keizer Transit Center signal
- Bus stop improvements
- Management and route design measures to reduce run times and improve reliability

### **Technological Applications**

Cherriots is currently working to procure computer aided dispatch and automatic vehicle location (CAD/AVL) software, which will allow all buses to be tracked in real-time, and make it possible to comprehensively measure the share of trips on time, as described in this section. This will also allow us to consider monitoring headway adherence of frequent service – in other words, whether buses are evenly spaced. Until then, staff use a different methodology to sample on-time performance – the best methodology given Cherriots technology and resources. Every April and October, Cherriots uses security cameras at the Downtown Transit Center and Keizer Transit Center to measure end-of-route on-time performance. Buses arriving five minutes after their scheduled arrival time or later are considered late.

Everything else is considered on time. (The target is 85% on time throughout the day, and 75% on time during the PM peak.) Additionally, Operations Supervisors conduct point checks in the field to ensure buses are not departing their time points early. Once the CAD/AVL solution is fully implemented (likely in 2019), staff will no longer need to sample trips to determine on-time performance.

### **3.3 Service Delays – Fixed-Route and Paratransit**

#### **Miles Between Road Calls**

##### ***Fixed-Route***

Fleet reliability is measured in miles between road calls. In addition to preventive maintenance, the Maintenance Department is now pursuing predictive maintenance where high profile components are replaced on a schedule determined by historical failures.

Road calls are applicable to 30' and 40' buses, and are divided into four categories:

- Major road calls are defined as road calls due to a mechanical failure that affects movement or safety, such as an engine, transmission, brakes or door.
- Minor road calls are defined as road calls due to a mechanical failure of a part that does not affect movement or safety, such as air conditioning or wheelchair lifts or ramps.
- Other road calls are defined as road calls caused by non-mechanical issues, such as accidents or bio-hazards.
- Total road calls are defined as the summation of major and minor road calls.

Chargeable road calls are the basis for performance goals of the Department.

##### ***Paratransit***

Provider contractor has adopted the new road call reporting process for LIFT maintenance that is similar to the process in place for fixed-route bus maintenance. This mileage is monitored closely for trends of increasing or decreasing road call incidents.

## **4. Schedule and Ridership**

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### **4.1 Schedule Design – Fixed-Route**

Cherriots service is designed to meet ridership demands while maintaining a high level of service efficiency. An important component to maintaining this efficiency is in designing service schedules to meet the varying demand levels for service.

#### **Productivity**

Service productivity is a measure of how well a service is utilized. To determine productivity, Cherriots measures the number of rides for every hour a bus is in service (rides per revenue hour). Targets for productivity differ depending on the type of route:

- Corridor Routes: 20 rides per revenue hour
- Neighborhood Shuttles: 10 rides per revenue hour
- Regional Express: 10 rides per revenue hour

Bus routes not meeting their targets are evaluated on an annual basis.

In the urban area, 75 % of revenue hours will be deployed with a focus on increasing ridership, predominantly on high demand corridors. This service will include frequent 15-minute service, express service, and standard 30-minute frequency routes, which are expected to provide overall high ridership.

#### **Coverage**

The remaining 25 % of urban revenue hours will be allocated to service that provides needed coverage throughout the community, with less consideration for expected boardings per revenue hour. This service will predominantly include neighborhood shuttle routes with 30-minute and 60-minute headways.

#### **Classification**

An entire route or individual segments of a route may be classified as either productivity-focused or coverage-focused. Service distribution must remain within plus or minus five percentage points of the target (e.g., 70-80% productivity-focused, and 20-30% coverage-focused).

#### **Network**

All local routes are designed either as neighborhood shuttles or corridor routes. Neighborhood shuttles funnel riders into activity centers, and corridor routes connect those centers at higher frequencies.



**Neighborhood Shuttles**

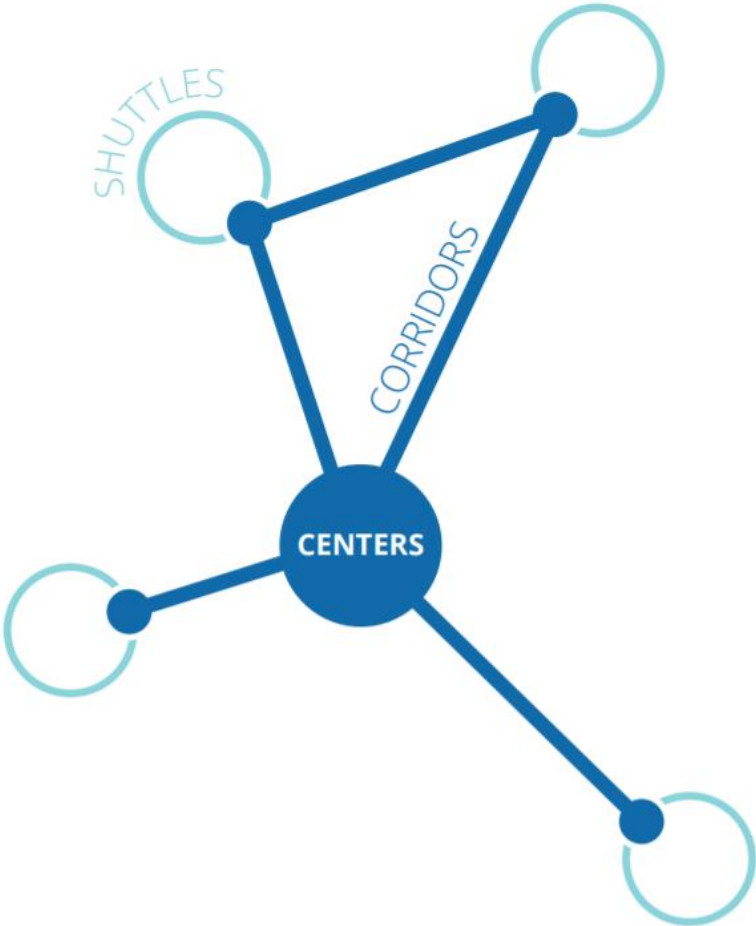
Neighborhood shuttles are focused on getting close to riders and bringing them on short trips to their neighborhood activity centers. Typically, buses used on these routes are smaller, quieter, and more neighborhood friendly. These shuttles can take a variety of forms, including small one-way loops, two-way service, or on-demand service.

**Activity Centers**

Activity centers are community hubs with a variety of shops, stores, and services. These are both primary destinations for riders, as well as places to transfer between routes. Cherriotics builds transit centers at some of these activity centers. Transit centers help facilitate transfers and create a better environment for riders waiting for the bus.

**Corridor Routes**

Corridor routes serve the main corridors in Salem and Keizer. They also help riders quickly travel between activity centers, ideally, at frequencies of every 15 minutes or better.



## **Multiple Purposes**

Service should help connect businesses, high-density residential, and other activity centers. A route is more useful and productive when there are multiple destinations along its path, with pick-ups and drop-offs occurring throughout the entire length of the route.

## **Network Connections**

Routes should be coordinated in a well-designed network. Transfers between routes allow for a more efficient service that doesn't require as much duplication. Routes should be designed to connect with one another at transit centers and major destinations. Additionally, Cherriots should install appropriate rider amenities at major transfer locations in order to provide riders with a comfortable experience while waiting.

## **Route Start and End**

Ideally, routes start and end at transit centers or major activity centers. This allows for easy access to those places and makes it easier to communicate to riders where a route is heading. The ends of routes should also have a good place for a bus to layover, as well as a place for Operators to use the restroom when possible.

## **Core Network**

When designing and realigning routes, staff must ensure service remains on the Core Network corridors. Additionally, routes on these corridors will receive the priority for frequent service on weekdays and 30-minute service on weekends.

## **What is the Core Network?**

The Core Network is a set of transit corridors where Cherriots has committed to providing stable service with a focus on frequency and reliability. By establishing a sense of permanency and an expectation for high-quality service, the Core Network signals to riders, business owners, and developers where to locate and build if they wish to orient themselves and their businesses around transit.

## **What gives the Core Network its permanency?**

In July 2017, the Cherriots Board of Directors (Board) adopted Core Network Policy 118. The routes serving the Core Network corridors may change over time, but the corridors must be served. Service changes that result in completely removing service from any piece of the Core Network will require formal action from the Board with a public hearing process in advance of implementation.

## **What makes up the Core Network?**

The Core Network is comprised of the following corridors:

- High, Broadway, and River Road – Union to Lockhaven

- Lockhaven – River Road to Chemawa
- Summer, Capitol, and Portland Road – Union to Hayesville
- Lancaster – Hayesville to Rickey
- Market – Capitol to Lancaster
- Center – 13<sup>th</sup> to Lancaster
- State – 13<sup>th</sup> to Lancaster
- Commercial – Kuebler to Trade
- Liberty – Commercial to Trade
- Madrona – Liberty to Commercial
- Skyline and Liberty – Kuebler to Madrona
- Marion and Center Street Bridges – Wallace to Front
- Edgewater – Eola to Gerth

### Flexible Routing

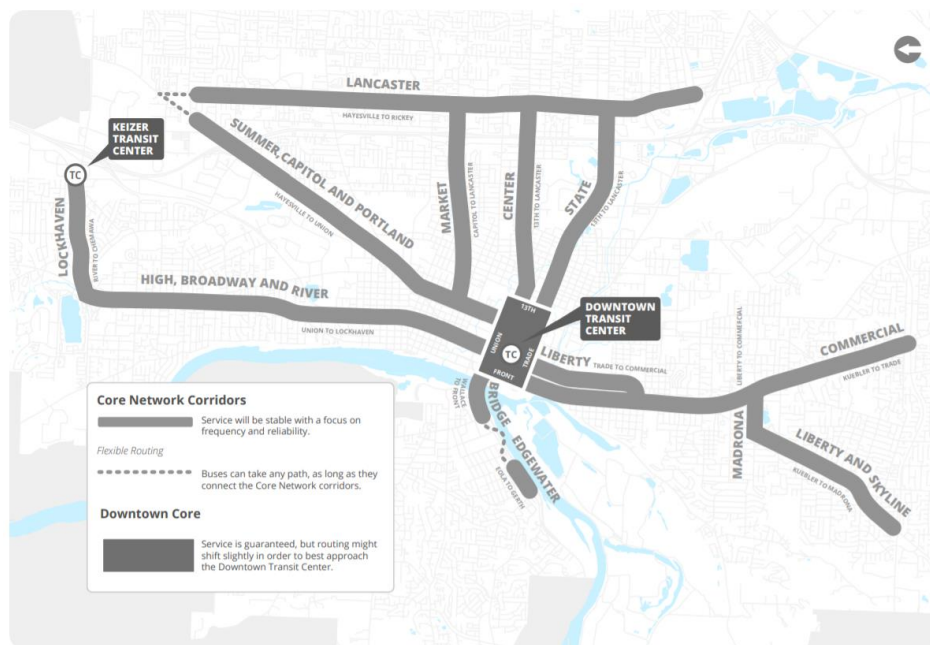
There are also some places where the corridors are disconnected and flexible routing is allowed. Buses can take any path to connect those corridors.

### Downtown Core

Cherriots guarantees service in the downtown core (between Front, Union, 13<sup>th</sup>, and Trade). In the downtown core, routing might shift slightly over time in order to best approach the Downtown Transit Center.

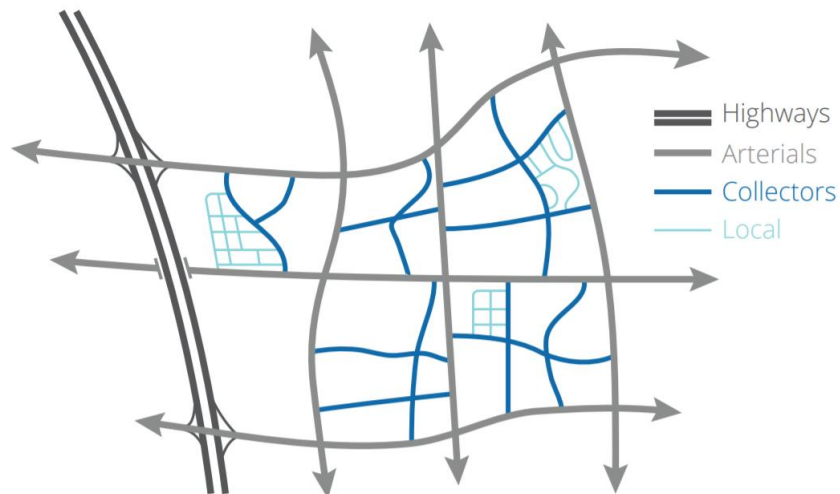
### Transit Centers

The Downtown Transit Center and Keizer Transit Center are both considered permanent fixtures of the Core Network.



## Routing

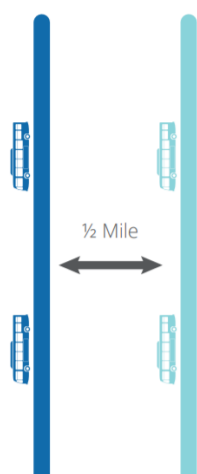
Buses are routed primarily down arterials and collector roads. Express routes can also be routed down limited access roads, such as highways. When traveling down streets with speed limits 45 mph or greater, however, bus stops should only be placed if they are in a turnout where the bus is pulled out of traffic – as specified in the 2012 ODOT Highway Design Manual. Local streets should be avoided unless there are no good alternatives. Buses should not be routed through parking lots when possible. Finally, routes must be designed to allow for vehicles to make safe turns.



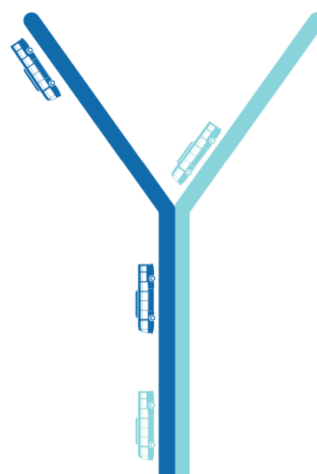
## Spacing and Duplication

Routes traveling along parallel corridors should be placed at least  $\frac{1}{2}$  mile apart. When routes share a path, their timing should be offset to avoid duplication. For example, two hourly routes sharing a path for half their length should provide 30-minute service along that shared path. This standard does not apply to routes as they are approaching a transit center.

Parallel corridors



Shared path, offset schedules



## Span of Service

Regular Cherrriots service is available between the 5:30 a.m. and 11:00 p.m. on weekdays. Peak periods on these days are experienced between 7:00 a.m. and 8:30 a.m. and 4:00 p.m. and 6:00 p.m.

## Frequency

Service levels on routes should be appropriate to demand. Local and regional express level of service is expressed differently, as local service often runs multiple times per hour, and regional express service often runs just multiple times per day.

### Local

Local Cherrriots routes have three levels of weekday service: frequent (every 15 minutes), standard (every 30 minutes), and basic (every 60 minutes). Service is designed to be consistent for most of the day to provide robust mid-day service and to help riders quickly learn how often their bus arrives. At a minimum, local buses must be scheduled to arrive once an hour to provide a base level of service. Public facing system maps currently define standard service as every 30 or 60 minutes.

### Regional Express

The level of service for regional express routes is measured by the number of daily round trips, because these buses are scheduled less frequently than local bus service. Buses on express service can either be scheduled throughout the day or only during the morning and evening peaks. At a minimum, regional express routes must have two round-trips per day on weekdays.

Frequent  
15 minutes  
30 minutes after 7 p.m.



Frequent bus routes form the backbone of the Cherrriots system. Unlike buses running every 30 or 60 minutes, buses running every 15 minutes or better allow riders to use the bus without having to look at a schedule. These routes are ideal for attracting new riders and providing great service for existing riders.

Standard  
30 minutes



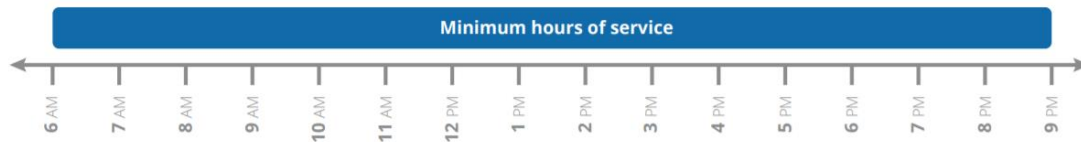
Basic  
60 minutes



A robust span of service is necessary to allow riders to get to work and other appointments early in the morning, and to help assure riders they will have a trip home. Even though buses are likely to be less utilized early in the morning and later in the evening, a good span of service helps build ridership in the mid-day and during the AM and PM peaks.

### Local

At minimum, all local routes must operate from 6 a.m. to 9 p.m. on weekdays.



### Regional express

Regional express routes have no minimum requirements for hours of service.

## Time Periods

### Local

Every trip on a route takes a different amount of time to complete. Often the differences are slight, but during times of heavy traffic or for trips that often have mobility devices, trip time can vary significantly. Although it might be tempting to create a unique schedule for every trip, doing so could be confusing for riders and difficult to remember for operators. In order to strike a balance between these competing needs, Cherriots typically creates different schedules for four periods of time (but can use less or more).

The standard time periods are:

- AM – start of service until 8:59 a.m.
- Mid-day – 9:00 a.m. until 1:59 p.m.
- PM – 2:00 p.m. until 6:59 p.m.
- Evening – 7:00 p.m. until end of service

Scheduled times remain consistent during each period in order to provide consistency. However, schedule times can be different between each period in order to reflect the differences in expected runtime throughout the day.



## Regional Express

Time periods are not used for regional express service. Because express service runs less frequently and for much longer distances than local service, custom schedules are developed for each individual trip.

## **Time Points**

### Local

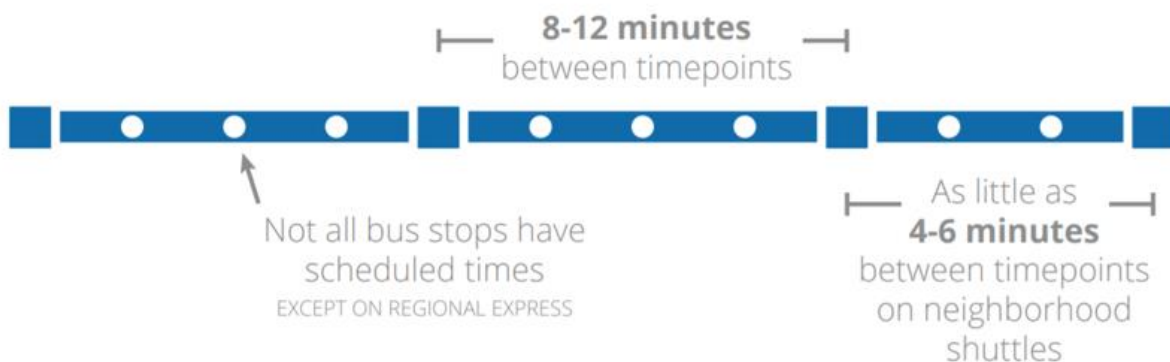
Bus stops with scheduled times are called time points. Time points are used to help give riders an idea of when the bus will arrive. They are also used by Operators to help ensure buses remain evenly spaced throughout the route.

Time points on local routes are spaced to balance the need to give riders accurate information with the need to give Operators some flexibility to help with the flow of the route. Typically, time points are spaced every 8-12 minutes. However, on neighborhood shuttles, time points can be spaced as close as every 4-6 minutes.

When deciding which bus stops will be time points, the priority is given to bus stops that:

- Serve a lot of riders
- Are at major intersections
- Are major transfer points
- Have a safe place for the bus to layover

On routes that share a path, time point locations are ideally the same for both routes along the shared stretch.



## Regional Express

On regional express routes, typically all bus stops are treated as time points, as there are often long stretches of time between stops.

## **Runtime**

Two methods are used to determine how much time should be scheduled on each route throughout the day: the first method is used when Cherriots already operates bus service along a path and has good runtime data, and the second method is used when service is added to a street that currently does not have bus service.

## **Currently Served**

When Cherriots already operates service along a path, runtime is determined by using real-world observations of current bus speeds. Samples of real bus travel time are collected, and Cherriots determines the 60<sup>th</sup> percentile running time within each time period. For example, the time it takes to travel between two time points during the AM time period might range between five and eight minutes, but 60% of trips take seven minutes or less. Because of this, seven minutes of runtime will be scheduled for that time period.

## **New Streets**

When developing schedules for service traveling down paths currently not served, Cherriots determines runtimes using the following three methods:

- Assumed speed – For high-level planning, Cherriots assumes buses travel at 15 mph on arterials and 17 mph on collectors.
- Google Maps estimates + 20% – Next, Cherriots uses Google Maps to evaluate travel speeds throughout the day, adding 20% to account for time spent at bus stops.
- Drive in buses – Once schedules are drafted using Google Maps estimates, Operators drive the new routes to see if the proposed schedules are realistic. Schedules are then modified based on operator input.

After new routes are put into service, special attention is given to their on-time performance. If there are any issues, they will be addressed as soon as possible.

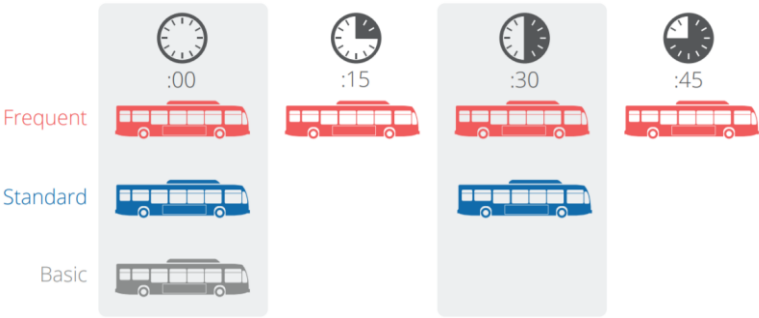
## **Timed Connections and Pulsing**

For most Cherriots routes, the primary transfer point is the Downtown Transit Center in the heart of Salem. In order to facilitate the transfers taking place at DTC, Cherriots schedules buses to connect on a pulse. A pulse is a timed transfer designed around a clock schedule. Buses typically layover at pulses for longer periods of time in order to ensure riders do not miss their transfers. This is especially important for routes that run infrequently where missing a transfer could mean waiting 30 minutes or an hour for the next bus.



Frequent service pulses at :00, :15, :30, and :45. Typically, standard 30-minute service is pulsed at :00 and :30, and hourly service is pulsed at :00. However, there are exceptions when two routes share a similar path and are timed to be offset. Regional express routes are pulsed at either :00 or :30 in order to allow riders to transfer to and from the local routes.

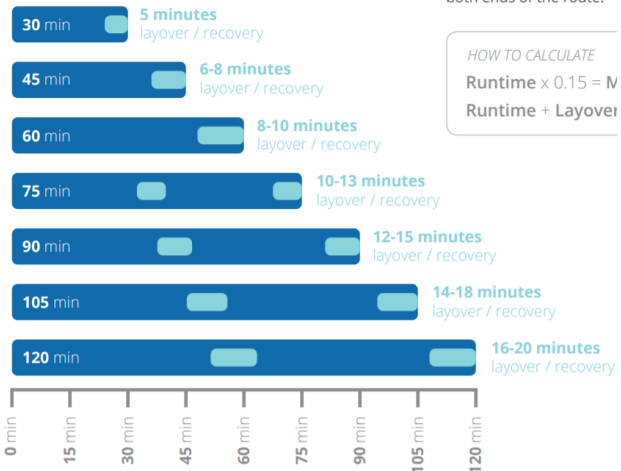
Whenever possible, routes that connect at other locations should be timed together to make it easy for riders to transfer. This can be difficult, however, because the pulse at the Downtown Transit Center has a big impact on when buses arrive at other points along the route. Depending on route length and runtime, timed connections at other places are sometimes possible, such as at Keizer Transit Center.



**Layover and Recovery**

At the end of a route, there is typically time scheduled both to allow for an Operator break (layover) and for a bus to get back on schedule if it is running late (recovery). Together, this is known as the layover/recovery time.

Layover/recovery should be between 15% and 20 % of a route’s runtime (and a minimum of five minutes). Together, the layover/recovery and runtime add up to the total cycle time of the route. If a route’s cycle time is more than 60 minutes round trip, layover/recovery time should be scheduled on both ends of the route.



## 4.2 Route Performance Monitoring – Fixed-Route

Staff routinely monitor performance throughout the year. Cherriots has established a number of performance measures and targets to ensure performance objectives and goals are met. Staff produce performance reports on a monthly, quarterly, and annual basis.

Cherriots monitors service as it enables staff to: make short-term adjustments where problems are occurring; intelligent, make informed decisions during the service planning process; and, measure how a route is performing in relation to how it is expected to perform.

When evaluating route and system performance, the five performance goals used by Cherriots in determining the success of our service are:

1. Productive – Service should be well-utilized in relation to how much service is provided.
2. Efficient – The cost to provide service should be reasonable in relation to how much service is provided and how much that service is used.
3. Reliable – Reliable riders should be able to count on the bus to pick them up and drop them off on time.
4. Comfortable – Riding the bus should be a pleasant experience and not over crowded.
5. Safe – Riders should feel safe and secure when riding a Cherriots bus.

Goal	Objective	Measure	Target	Evaluation Level	
				System	Route
Productive	Provide service to as many riders as possible given available service	Riders per revenue hour	<i>Corridor route:</i> 20 rides / hr <i>Neighborhood shuttle:</i> 10 rides / hr <i>Regional express:</i> 10 riders / hr	✓	✓
Efficient	Keep costs at reasonable levels	System cost per revenue hour	Year-over-year increase less than regional consumer price index	✓	✓
		Operating cost per ride	<i>No specific target; for reporting purposes only</i>	✓	✓
	Be good stewards of public funds	Share of fare revenue in relation to operating costs	<i>No specific target; for reporting purposes only</i>	✓	✗
		Operating subsidy per ride	<i>No specific target; for reporting purposes only</i>	✓	✓
Reliable	Ensure trips depart on time	Share of trips on time, late, very late, and early	<i>All day:</i> 85% on time, 10% late, 5% very late, 0% early <i>PM:</i> 75% on time, 15% late, 10% very late, 0% early	✓	✓
	Maintain enough buses and available operators to run scheduled service	Share of maintained pullouts	99.5% or higher	✓	✗
	Maintain buses to avoid mechanical failures while in service	Frequency of mechanical failures resulting in a road call	Less than one for every 10,000 vehicle miles traveled	✓	✗
	Limit number of standing riders	Average rider to seat ratio at maximum load point	<i>Local:</i> 1.3 <i>Regional express:</i> 1.0	✗	✓
Safe	Limit preventable bus collisions	Frequency of preventable bus collisions	Less than 2 for every 100,000 total miles traveled	✓	✗

## **Performance Monitoring and Reporting**

Performance is monitored throughout the year. Reports are published monthly, quarterly, and annually, and compare current performance to the performance over the same period during the previous year.

- Monthly – Monthly Performance Reports are published on the fourth Thursday of the month, following data collection. These reports are used to guide decisions about route maintenance for the triannual service changes.
- Quarterly – Quarterly Performance Reports are three month summaries of each fiscal quarter. These reports are presented to the Board on the fourth Thursday, two months following data collection and are primarily used to keep the Board informed about route and system performance. (Q1: Jul-Sep • Q2: Oct-Dec • Q3: Jan-Mar • Q4: Apr-Jun)
- Annual – Annual Performance Reports are yearly summary reports for the fiscal year. Additionally, they include individual route profiles. The reports are published by the first Thursday in September and presented to the Board on the fourth Thursday of September. Results from the reports are used to inform the needs assessment.

## **Service Assessment**

Once data and input are gathered and analyzed, Cherriots assesses whether current transit and transportation options in the service area meet the needs of the community.

Staff begin by evaluating the route path, trip time, frequency, span, and performance of current Cherriots bus routes.

Staff then look at other services Cherriots operates or facilitates in the region, including:

- Cherriots LIFT – Paratransit service for the Salem-Keizer UGB.
- Cherriots Shop and Ride - Both a shopper shuttle and dial-a-ride for seniors and individuals with disabilities.
- Polk County Flex – A shared-ride reservations-based service for Dallas, Monmouth, and Independence.
- Vanpools – Facilitated by the Cherriots Trip Choice program. Vanpools are organized and subsidized for those with similar travel patterns.

Finally, Cherriots evaluates other transportation services provided in the area, including city circulators and dial-a-rides, intercity transit routes, non-emergency medical transportation (NEMT), and private transportation services.

Cherriots also modifies bus schedules and routes to manage capacity and maximize service productivity. Productivity is measured as the portion of time that buses spend serving passengers (revenue hours) compared to the total time that buses are out of the bus yard (vehicle hours).

Vehicle hours include: revenue hours, time between ends of lines and the garages (deadhead hours), and schedule recovery/Operator break times during the day (layover hours). Productivity enhancements balance layover hours to provide schedule recovery time when and where it is most needed. This increases the overall usefulness of transit service by reallocating service (lines and parts of routes) with low ridership to lines with higher ridership potential. Allocation of service to meet customer demand is important for ensuring adequate frequency and availability of seats.

Cherriots improves internal operations to ensure that buses leave the end of the line on time, that schedules reflect realistic running times, provide balanced layover times, and that service disruptions are addressed quickly. Efforts are also underway to work with Operators and other field personnel to improve on-time performance and operating conditions, and adjust runtimes when appropriate.

### 4.3 Performance Data

<b>RIDERSHIP</b>	<b>FY 2014</b>	<b>FY 2015</b>	<b>FY 2016</b>	<b>FY 2017</b>
<i>Local</i>	3,256,546	3,304,058	2,953,459	2,900,817
<i>Regional</i>	193,768	188,398	162,636	144,465
<i>LIFT</i>	159,985	160,327	150,906	140,875
<i>Shop and Ride</i>	8,856	7,998	7,851	9,107

<b>REVENUE HOURS</b>	<b>FY 2014</b>	<b>FY 2015</b>	<b>FY 2016</b>	<b>FY 2017</b>
<i>Local</i>	150,969	149,455	157,054	164,298
<i>Regional</i>	23,187	23,472	23,978	23,888
<i>LIFT</i>	63,380	62,849	62,444	61,380
<i>Shop and Ride</i>	4,216	4,091	4,103	4,684

<b>REVENUE MILES</b>	<b>FY 2014</b>	<b>FY 2015</b>	<b>FY 2016</b>	<b>FY 2017</b>
<i>Local</i>	1,814,263	1,861,951	2,004,511	2,044,465
<i>Regional</i>	509,720	506,411	527,127	263,271
<i>LIFT</i>	801,604	787,126	775,475	752,523
<i>Shop and Ride</i>	46,483	40,492	40,779	51,085

## 4.4 Passenger Load Standards – Fixed-Route

Cherriots service standards list acceptable passenger capacities for different vehicles. These standards encourage ridership by preventing passenger overcrowding and ensuring everyone has a comfortable ride. Alleviating crowding generally requires greater capital and operating resources for more buses and trains, operators, mechanics, supervisory personnel, and equipment.

Crowding is measured as a proxy for rider comfort. To measure how full a bus is, Cherriots monitors its load factor – a measure of how many riders are on the bus compared to the number of available seats. The load factor is expressed in decimal form (e.g., a bus that has 30 seats and 30 riders on the bus would have a load factor of 1.0, while a bus that has 30 seats and 33 riders would have a load factor of 1.1).

### Local – 1.3 riders per seat

On local routes, the average load factor should not exceed 1.3 at the route’s maximum load point (the place along the route where the bus is most full) over a three-month period.

	35-foot low floor	 32 seated	 9 standing
	40-foot low floor	 39 seated	 11 standing

### Regional Express – 1.0 riders per seat

On regional express routes, the average load factor should not exceed 1.0 at the route’s maximum load point (the place along the route where the bus is most full) over a three-month period.

	35-foot high floor	 35 seated	 0 standing
	40-foot commuter	 37 seated	 0 standing

### Monitoring Overcrowding

Staff will not be able to use the established methodology to measure overcrowding until Cherriots procures new automatic passenger counters (APCs). In the interim, when a bus is at capacity, transit operators notify dispatch that they have passed up riders waiting for the bus. These occurrences are logged and monitored.

## **4.5 Factors Influencing Peak Period Ridership – Fixed-Route**

### **Maintained pullouts**

When a bus successfully leaves the yard to complete its trip, this is known as a maintained pullout. Sometimes pullouts are missed if there is not an Operator available to drive a bus or if no bus is available. The number of maintained pullouts should be at least 99.5% of all scheduled pullouts.

### **Mechanical failures**

Sometimes buses experience mechanical failures while in service that require a road call. A road call can result in either a bus being repaired out in the field or a bus being towed back to the yard for maintenance. Mechanical failures requiring a road call should occur less than once every 10,000 miles a bus is in operation.

Peak pullouts are projected based on existing service needs and planned service changes. Projecting peak pullouts assists the agency with planning for future bus purchases and fleet retirement. All Cherriots Local service buses are now low-floor vehicles and the majority are equipped with APCs. All buses are now ASA-equipped.

## **4.6 ADA Paratransit**

Cherriots ADA complimentary paratransit service provided demand responsive transportation services to people with disabilities in the Salem-Keizer UGB serving Marion and portions of Polk counties. Cherriots began Cherriots LIFT paratransit service in 1992 to meet American with Disabilities Act (ADA) requirements. At that time, the booking of trips on ADA/Paratransit was contract centralized call taking, scheduling, and dispatching for the Cherriots LIFT service. Cherriots subsequently eliminated trip denials, implemented next-day service, and is fully ADA compliant.

The Cherriots LIFT transportation service currently operates origin-to-destination service according to service standards that exceed or are equal to the standards established by the ADA.

Persons eligible for Cherriots LIFT transportation service are unable to use Cherriots Local routes due to a disability or disabling health condition. Cherriots LIFT is a shared-ride, public transportation service. Cherriots LIFT also provides transportation for clients sponsored by social service agencies that contract with Cherriots. Customers must be registered in the program before receiving a ride, with the exception of Cherriots LIFT applicants being transported to eligibility assessments. The Cherriots LIFT contractor is assigned a number of rides for individuals who are traveling the Cherriots LIFT Eligibility Office for interview and assessments, as needed. These riders may not be Cherriots LIFT eligible and no fare

is charged for these application trips. Approximately 2,300 customers are eligible to access Cherriots LIFT transportation service.

Cherriots LIFT provides approximately 12,400 one-way trips per month. At this time, Cherriots LIFT does not provide trips on Saturday, Sunday, New Year's Day, President's Day, Memorial Day, Independence Day, Labor Day, Veteran's Day, Thanksgiving Day, and Christmas Day. Cherriots LIFT operates during the same days and hours as Cherriots Local routes. Cherriots LIFT provides service between approximately 5:45 a.m. to 9:00 p.m., Monday through Friday. All rides are by advance reservation only and must be requested no later than 5:00 p.m. the day before the trip. Cherriots LIFT service fares are \$3.20 per time the bus is boarded. The Cherriots LIFT fleet consists of 45 ADA-accessible vehicles of varying capacities. Vehicles range from MV-1s to 24' cutaways. Typical useful life for these vehicles is five years.

### **Performance Standards**

Cherriots contractor is responsible for providing the performance standards:

- Provide sufficient vehicles and Operators to perform all work as assigned by Cherriots.
- Meet or exceed goal for on-time delivery of service overall.
- Meet or exceed goal for collision per 100,000 miles.
- Maintain on-time pull-out at or above 98%.
- Complete written reports regarding all accidents or incidents involving vehicles or Operators providing service within 24 hours.
- Resume service within 60 minutes after service disruption caused by vehicle breakdowns or employee illness.

In response to the combined pressures of ridership demand, customer demands for service quality improvements and limited funding, Cherriots and consumer groups in the region are working together to improve mobility for persons with disabilities through cost efficient, innovative services, marketing fixed-route as a transportation preference and a variety of fixed-route travel training programs.



# 5. PLANNED BUS PROCUREMENT

## Fixed-Route – Vehicle Replacement

Cherriots replaces 35' and 40' fixed-route buses after approximately 15 years, in accordance with our Transit Asset Management State of Good Repair) targets.\* The FTA's Useful Life Benchmark standard for fixed-route buses is 12 years or 500K Miles. Because of exceptional preventative maintenance, Cherriots is able to capture additional years of service. Bus replacement is a top priority of Cherriots. Costs of the replacement purchases, as planned, are included in the Capital Plan (Table 5-1).

TABLE 5-1 - CHERRIOTS VEHICLE REPLACEMENT

CHERRIOTS REQUIREMENTS - ACTIVE FLEET														
FLEET NBR	FY BUILT	BUS LENGTH	FLEET SIZE	FUEL TYPE	BUS MAKE & DESCRIPTION	AGE END FY 2019	REPLACE BY END FY	CURRENT	2019	2020	2021	2022	2023	
101-112	2002	35	12	CNG	Orion 7	17	2017	12	6	0	0	0	0	
201-212	2002	40	12	CNG	Orion 7	17	2017	12	6	0	0	0	0	
213,214	2004	40	2	CNG	Orion 7	15	2019	2	2	0	0	0	0	
115,122	2005	40	8	BD	Gillig	15	2020	8	8	8	0	0	0	
215-222	2008	35	10	CNG	Orion 7	11	2023	10	10	10	10	10	10	
223-226	2008	40	4	BD	Gillig	11	2023	4	4	4	4	4	4	
227,234	2011	40	8	BD	Gillig	8	2026	8	8	8	8	8	8	
123-126	2011	35	4	BD	Gillig	8	2026	4	4	4	4	4	4	
127-130	2012	35	4	BD	Gillig	7	2027	4	4	4	4	4	4	
1801-1806, 1851-1856	2019	35/40	12	CNG	Gillig	0	2034		12	12	12	12	12	
TBD	2020	35/40	14	CNG	Gillig	0	2035			14	14	14	14	
TBD	2021	35/40	8	CNG	Transit	0	2036				8	8	8	
<b>Fleet Size</b>								<b>64</b>	<b>64</b>	<b>64</b>	<b>64</b>	<b>64</b>	<b>64</b>	

CNG - Compressed Natural Gas  
BD - Bio-diesel

## Cherriots LIFT – Vehicle Replacement

Cherriots replaces our Cutaway-style vehicles at approximately eight (8) years, as well as our current fleet of MV-1 vehicles, in accordance with our Transit Asset Management (State of Good Repair) targets.\* Generally, the FTA's Useful Life Benchmark is five (5) years. Because of exceptional preventative maintenance, Cherriots is able to capture additional years of service. Bus replacement is a top priority of Cherriots. Costs of the replacement purchases, as planned, are included in the Capital Plan (Table 5-2).

TABLE 5-2 - CHERRIOTS LIFT VEHICLE REPLACEMENT

CHERRIOTS LIFT VEHICLES														
FLEET NBR	FY BUILT	BUS LENGTH	FLEET SIZE	FUEL TYPE	BUS MAKE & DESCRIPTION	AGE END FY 2019	REPLACE BY END FY	CURRENT	2019	2020	2021	2022	2023	
857-861	2007	22	4	GAS	Champion	12	2015	4	0	0	0	0	0	
827-831	2008	22	5	GAS	Elkhart	11	2016	5	4	0	0	0	0	
V1655	2008	15	1	GAS	Minivan	11	2016	1	1	0	0	0	0	
832,833	2009	22	2	GAS	EK Coach	10	2017	2	2	0	0	0	0	
834-837	2010	22	4	GAS	Startrans	9	2018	4	4	0	0	0	0	
838-854	2011	22	16	GAS	Startrans	8	2019	16	16	15	0	0	0	
862-865	2013	22	4	GAS	Arboc	6	2021	4	4	4	4	0	0	
1401-1403	2014	15	3	GAS	MV-1	5	2022	3	3	3	3	3	3	
1404-1407	2015	22	4	GAS	MV-1	4	2023	4	4	4	4	4	4	
TBD	2019	22	5	GAS	Glaval	0	2027		5	5	5	5	5	
TBD	2020	22	12	GAS	Cutaway	0	2028			12	12	12	12	
TBD	2021	22	15	GAS	Cutaway	0	2029				15	15	15	
TBD	2022	22	4	GAS	Cutaway	0	2030					4	4	
<b>Fleet Size</b>								<b>43</b>	<b>43</b>	<b>43</b>	<b>43</b>	<b>43</b>	<b>43</b>	



## Regional – Vehicle Replacement

Cherriots runs several different vehicle types for its Cherriots Regional Service. Category B vehicles are replaced on a 12-year cycle, in accordance with our Transit Asset Management (State of Good Repair) targets.\* All Cutaway-style vehicles are replaced on an eight (8) year cycle, as previously detailed in the Cherriots LIFT section. Because of exceptional preventative maintenance, Cherriots is able to capture additional years of service. Bus replacement is a top priority of Cherriots. Costs of the replacement purchases, as planned, are included in the Capital Plan (Table 5-3).

TABLE 5-3 - CHERRIOTS REGIONAL VEHICLE REPLACEMENT

CHERRIOTS REGIONAL REQUIREMENTS - ACTIVE FLEET

FLEET NBR	FY BUILT	BUS LENGTH	FLEET SIZE	FUEL TYPE	BUS MAKE & DESCRIPTION	AGE END FY 2019	REPLACE END FY	CURRENT						
									2019	2020	2021	2022	2023	
353-354	2004	33	2	Diesel	Freightliner	15	2014	2	0	0	0	0	0	
355-357	2006	34	3	Diesel	Freightliner	13	2016	3	2	0	0	0	0	
304	2009	25	1	GAS	Ford 450	10	2017	1	1	1	1	1	1	
305	2010	25	1	GAS	Ford 450	9	2018	1	1	1	1	1	1	
358-359	2010	33	3	Diesel	Champion	9	2020	3	3	3	3	3	3	
360	2010	33	1	Hybrid	International	9	2020	1	1	1	1	1	1	
307	2012	24	1	GAS	Ford 450	7	2020	1	1	1	1	1	1	
TBD	2018	35	3	Diesel	Bluebird	1	2028		3	3	3	3	3	
TBD	2020	35	2	Diesel	TBD					2	2	2	2	
Fleet Size									12	12	12	12	12	12

## Shop and Ride – Vehicle Replacement

Cherriots replaces our Cutaway-style vehicles at approximately eight (8) years, as well as our current fleet of MV-1 vehicles, in accordance with our Transit Asset Management (State of Good Repair) targets.\* Generally, the FTA's Useful Life Benchmark is five (5) years. Because of exceptional preventative maintenance, Cherriots is able to capture additional years of service. Bus replacement is a top priority of Cherriots. Costs of the replacement purchases, as planned, are included in the Capital Plan (Table 5-4).

TABLE 5-4 - CHERRIOTS SHOP AND RIDE VEHICLE REPLACEMENT

CHERRIOTS SHOP AND RIDE VEHICLES

FLEET NBR	FY BUILT	BUS LENGTH	FLEET SIZE	FUEL TYPE	BUS MAKE & DESCRIPTION	AGE END FY 2019	REPLACE END FY	CURRENT					
									2019	2020	2021	2022	2023
503,503	2007	22	2	GAS	Champion	12	2015	2	1	0	0	0	0
504	2010	22	1	GAS	Champion	9	2018	1	1	1	1	1	1
550,551	2010	15	2	GAS	Minivan	9	2018	2	2	2	2	2	2
TBD	2019	22	1	GAS	Eldorado	0	2027		1	1	1	1	1
TBD	2020	22	1	GAS	TBD					1	1	1	1
Fleet Size									5	5	5	5	5

\* See Appendix C for Cherriots Transit Asset Management Targets (State of Good Repair)

# APPENDICES

# APPENDIX A

## Preventative Maintenance (PM) Inspection Reports

### Cherriots – Gillig Inspections A Service

#### SALEM AREA MASS TRANSIT DISTRICT Inspection Checklist Items

Inspection Id: GI35

Type: A

Item Number	Description
01.00	Date _____ Mileage _____ WO# _____ IND# _____
01.01	Probe Fare box, before starting service.
01.05	Install protective seat cover on drivers seat
01.10	Fire Suppression System Check:
01.11	A. Fire suppression green LED on.
01.12	B. All other LED's off.
01.13	C. Press to test, bell and relay engaged LED on. Push Relay Reset to clear
01.20	Check brake and accelerator pedal action and feel, pump down air system.
01.21	Check throttle pedal spring on electronic control pedal.
01.25	Check seat belt cutter is properly mounted
01.30	Check warning buzzer, horn, tell tale lamps, driver's controls, and gauges.
01.40	Check parking brake operation holds without movement. Idle to full throttle -- max 2 sec.
01.50	Check brake and accelerator interlock.
01.60	Check tilt steering wheel adjustment and telescope.
01.70	Check kneel operation and adjustments.
01.80	Check turn signals.
01.81	Farebox mounting
01.90	Check door operation - speeds and sensitive edges.
02.10	Check wheelchair ramp operation - tie-down straps, seat belts, wheel locks, and fold-up seat.
02.20	Check interior and exterior for damage, missing parts, decals, seats, stanchions, vents, panels, and locks.
02.30	Check window operations including emergency features.
02.31	Check vandal guard film for damage and scratches, and note if replacement is needed.
02.40	Check all interior and exterior lights.
02.50	Check back-up lights and horn.
02.60	Check bike rack - lube latch, hinges, and check all for proper operation.
02.70	Check windshield wipers and washers. Rinse windshield - do not allow soap to dry.
02.71	Fill windshield washer reservoir
02.80	Check for intact red tie on emergency triangle box - repl as needed.
02.81	Check expiration date on fire extinguisher - replace if needed.
02.89	Check paper towel and puke bag
02.90	Check driver's first aid box for an intact seal. If seal is broken, check contents and restock items as necessary (see list below)
02.91	10 ea - Band-aids (+/- 1 or 2)

**SALEM AREA MASS TRANSIT DISTRICT  
Inspection Checklist Items**

Inspection Id: GI35  
Type: A

Item Number	Description
02.92	3-4 - Gauze pads
02.93	3-4 - Disinfectant towelettes
02.94	2-3 - Pair Latex Gloves
02.95	1 ea - CPR Microshield
02.96	1 ea - Red Biohazard Bag
03.00	Check destination signs - operation, lights, glass.
03.10	Allow air compressor to build to 125 lbs., cut off pressure, shut off engine.
03.20	Loss of air pressure in one minute - brake. Record loss _____
03.29	Clean water spots on mirrors and drivers window areas.
03.30	Steam clean engine, transmission, radiator, & undercarriage before inspection and road test.
03.32	Steam clean fuel tank
03.34	Open rear fenders & steam clean
03.40	Road test - check engine performance, steering, suspension noise, transmission, and shift points.
03.41	1st _____ mph 2nd _____ mph 3rd _____ mph 4th _____
03.42	Perform shop test with digital recorder - Route code 9999
03.51	Decel test Service brakes _____ % _____ foot from 20 mph
03.52	Decel test Park brake _____ % _____ foot from 20 mph.
03.58	Check fire suppression bottle gauge in green area.
03.59	Drain ping air tank, valve at RR corner of bus under bumper
03.60	Check all fluid levels - engine oil, power steering fluid, transmission, coolant.
03.80	Change oil and filters, take sample at operating temperature. Use back up wrench when removing drain plug Torque drain plug 32ft/lbs
04.10	Check fuel, oil, water, air, trans. & PS lines under bus for rubbing, kinks, frays & leaks
04.20	Check exhaust system manifold and turbo for leaks.
04.30	Brake Linings - check wear line.
04.31	RF _____ LF _____ RR _____ LR _____
04.40	Check roller to cam positions.
04.41	RF _____ LF _____ RR _____ LR _____
04.42	Check Slack adjuster adjusting bolt with a torque wrench @ 13 ft lbs or 156 in/lbs.
04.43	RF _____ LF _____ RR _____ LR _____
04.44	Check slack adjusters Clevis and Pins.
04.45	Check rear Brake Chambers vent tubes for cracking.
04.46	Do brake stroke measurement with 90 to 100 PSI Gillig Fronts 2" ,Rear 2" Max.

**SALEM AREA MASS TRANSIT DISTRICT  
Inspection Checklist Items**

Inspection Id: GI35

Type: A

Item Number	Description
04.47	Applied RF _____ LF _____ RR _____ LR _____.
04.48	Brakes released RF _____ LF _____ RR _____ LR _____.
04.49	Stroke length RF _____ LF _____ RR _____ LR _____.
04.50	Record tire air pressure. - 120 PSI front and rear cold.
04.51	LF _____ RF _____ LRI _____ LRO _____ RRI _____ RRO _____
04.60	Record tire tread depth - Minimum of 4/32" on Fronts & Rears
04.61	LF _____ RF _____ LRI _____ LRO _____ RRI _____ RRO _____
04.70	Clean differential breather, check for fluid leaks
04.80	Undercarriage inspection.
04.90	Tie rods and ends.
05.10	Check king pins and front wheel bearing adjustment.
05.20	Check steering gear and linkage.
05.21	Check steering gear mounting plate for cracks.
05.30	Check wheel seals.
05.40	Check air bags.
05.50	Check lateral & radius rod bushings.
05.60	Check drive line and u-joints.
05.70	Check shocks and bushings.
05.80	Check engine and transmission mounts; cradle supports.
05.85	Lube chassis. Lube S- cams & Anchor pins. 1 pump by hand pump only.
05.90	Check and clean DEF vent tube if equipped on DEF tank.
05.91	Change spin on fuel filter
05.92	Check Processor filter fuel level, change if needed.
06.00	Change hydraulic oil filter
06.10	Drain 4 air tanks at front of bus & check for excess moisture.
06.20	Check ground straps, battery cables, terminals, and starter connections.
06.30	Clean battery Tops. Load test @ DECA 700 CCA & 950 Interstate batteries. .
06.31	1) _____ 2) _____ 3) _____ 4) _____
06.40	Clean or replace driver's heater filter.
06.50	Tighten intake clamps, check air compressor inlet hose condition.
06.70	Check air filter minder - change filter if in red area. Date filter when changed.
06.72	Remove belt covers ,check belts,Idlers pulleys bearings & tensioner.

**SALEM AREA MASS TRANSIT DISTRICT**  
**Inspection Checklist Items**

Inspection Id: GI35

Type: A

Item Number	Description
06.80	Check condition of alternator belt and power steering pump belt.
06.81	Check AC compressor drive belt (200 lbs +/- 10 lbs)
06.90	Check fuel, oil, coolant, air, transmission, & PS lines in engine compartment.
07.30	Check exhaust system and muffler.
07.40	Check all side compartment door latches, clean and lube.
07.50	Wheel stud nuts - check for proper torque (450 to 500 ft/lbs).
07.51	Clear engine codes with lap top.
07.52	Remove hard drive .View hard drive for about 2 min, to make sure all cameras and sound are working normal. Reinstall hard drive and check to see if system reboots and says: System OK.
07.53	Check recorder date and time,make sure it is set to the present time and date.
08.74	Check DVI books-1 book they are using, 1 last 30 days used, 1 new book, all others remove.
08.98	Check & Fill day pass in Fare box. DO NOT OVER FILL
09.00	Clean swipe card & trim with cleaning card.
09.05	Clean coin insert slot.
09.07	Clean Coin Validator externally & internally.
09.08	Pressure check cooling system--Should hold 16 lbs.
09.09	Check Wheel chair ramp torque on drive sprocket screws-(130 inch lbs. use blue loctite)
09.10	Road test on return check for leaks and fluid levels.
09.11	Check interior cleanliness to make sure it is presentable for the public before parking.

**Cherriots – Gillig Inspections**  
**B Service**

**SALEM AREA MASS TRANSIT DISTRICT**  
**Inspection Checklist Items**

Inspection Id: GI35  
 Type: B

Item Number	Description
01.00	Date _____ Mileage _____ WO# _____ IND# _____
01.01	Probe Fare box, before starting service.
01.05	Install protective seat cover on drivers seat
01.10	Fire Suppression System Check:
01.11	A. Fire suppression green LED on.
01.12	B. All other LED's off.
01.13	C. Press to test, bell and relay engaged LED on. Push Relay Reset to clear
01.20	Check brake and accelerator pedal action and feel, pump down air system.
01.21	Check throttle pedal spring on electronic control pedal.
01.25	Check seat belt cutter is properly mounted
01.30	Check warning buzzer, horn, tell tale lamps, driver's controls, and gauges.
01.40	Check parking brake operation holds without movement. Idle to full throttle -- max 2 sec.
01.50	Check brake and accelerator interlock.
01.60	Check tilt steering wheel adjustment and telescope.
01.70	Check kneel operation and adjustments.
01.80	Check turn signals.
01.81	Farebox mounting
01.90	Check door operation - speeds and sensitive edges.
02.20	Check interior and exterior for damage, missing parts, decals, seats, stanchions, vents, panels, and locks.
02.30	Check window operations including emergency features.
02.31	Check vandal guard film for damage and scratches, and note if replacement is needed.
02.40	Check all interior and exterior lights.
02.50	Check back-up lights and horn.
02.60	Check bike rack - lube latch, hinges, and check all for proper operation.
02.70	Check windshield wipers and washers. Rinse windshield - do not allow soap to dry.
02.71	Fill windshield washer reservoir
02.80	Check for intact red tie on emergency triangle box - repl as needed.
02.81	Check expiration date on fire extinguisher - replace if needed.
02.89	Check paper towel and puke bag
02.90	Check driver's first aid box for an intact seal. If seal is broken, check contents and restock items as necessary (see list below)
02.91	10 ea - Band-aids (+/- 1 or 2)
02.92	3-4 - Gauze pads





**Cherriots – Gillig Inspections**  
**C Service**

**SALEM AREA MASS TRANSIT DISTRICT**  
**Inspection Checklist Items**

Inspection Id: GI35  
 Type: C

Item Number	Description
01.00	Date _____ Mileage _____ WO# _____ IND# _____
01.01	Probe Fare box, before starting service.
01.05	Install protective seat cover on drivers seat
01.10	Fire Suppression System Check:
01.11	A. Fire suppression green LED on.
01.12	B. All other LED's off.
01.13	C. Press to test, bell and relay engaged LED on. Push Relay Reset to clear
01.20	Check brake and accelerator pedal action and feel, pump down air system.
01.21	Check throttle pedal spring on electronic control pedal.
01.25	Check seat belt cutter is properly mounted
01.30	Check warning buzzer, horn, tell tale lamps, driver's controls, and gauges.
01.40	Check parking brake operation holds without movement. Idle to full throttle -- max 2 sec.
01.50	Check brake and accelerator interlock.
01.60	Check tilt steering wheel adjustment and telescope.
01.70	Check kneel operation and adjustments.
01.80	Check turn signals.
01.81	Farebox mounting
01.90	Check door operation - speeds and sensitive edges.
02.20	Check interior and exterior for damage, missing parts, decals, seats, stanchions, vents, panels, and locks.
02.30	Check window operations including emergency features.
02.31	Check vandal guard film for damage and scratches, and note if replacement is needed.
02.40	Check all interior and exterior lights.
02.50	Check back-up lights and horn.
02.60	Check bike rack - lube latch, hinges, and check all for proper operation.
02.70	Check windshield wipers and washers. Rinse windshield - do not allow soap to dry.
02.71	Fill windshield washer reservoir
02.80	Check for intact red tie on emergency triangle box - repl as needed.
02.81	Check expiration date on fire extinguisher - replace if needed.
02.89	Check paper towel and puke bag
02.90	Check driver's first aid box for an intact seal. If seal is broken, check contents and restock items as necessary (see list below)
02.91	10 ea - Band-aids (+/- 1 or 2)
02.92	3-4 - Gauze pads

**SALEM AREA MASS TRANSIT DISTRICT**  
**Inspection Checklist Items**

Inspection Id: GI35  
Type: C

Item Number	Description
02.93	3-4 - Disinfectant towelettes
02.94	2-3 - Pair Latex Gloves
02.95	1 ea - CPR Microshield
02.96	1 ea - Red Biohazard Bag
03.00	Check destination signs - operation, lights, glass.
03.10	Allow air compressor to build to 125 lbs., cut off pressure, shut off engine.
03.20	Loss of air pressure in one minute - brake. Record loss _____
03.25	Clean Heaters and Evaporator coil areas, and change filter only if it is determined filter is plugged.
03.29	Clean water spots on mirrors and drivers window areas.
03.30	Steam clean engine, transmission, radiator, & undercarriage before inspection and road test.
03.32	Steam clean fuel tank area.
03.34	Open rear fenders & steam clean
03.40	Road test - check engine performance, steering, suspension noise, transmission, and shift points.
03.41	1st ____ mph 2nd ____ mph 3rd ____ mph 4th ____
03.42	Perform shop test with digital recorder - Route code 9999
03.51	Decel test Service brakes _____ % _____ foot from 20 mph
03.52	Decel test Park brake _____ % _____ foot from 20 mph.
03.53	AC check freon level.
03.58	Check fire suppression bottle gauge in green area
03.59	Drain ping air tank, valve at RR corner of bus under bumper
03.60	Check all fluid levels - engine oil, power steering fluid, transmission, coolant.
03.61	Check and clean DEF vent tube if equipped on DEF tank.
03.62	Change spin on fuel filter.
03.63	Check Processor filter fuel level, change if needed.
03.79	Sample transmission fluid. Do not change.
03.80	Change oil and filters, take sample at operating temperature. Use back up wrench when removing drain plug Torque drain plug 32ft/lbs
03.81	Change hydraulic oil filter
03.82	Change hydraulic fluid
03.84	Change coolant filter CAUTION: Turn coolant line valves back on after filter change.
04.10	Check fuel, oil, water, air, trans. & PS lines under bus for rubbing, kinks, frays & leaks
04.20	Check exhaust system manifold and turbo for leaks.
04.30	Brake Linings - check wear line.

**SALEM AREA MASS TRANSIT DISTRICT  
Inspection Checklist Items**

Inspection Id: GI35  
Type: C

Item Number	Description
04.31	RF _____ LF _____ RR _____ LR _____
04.40	Check roller to cam positions.
04.41	RF _____ LF _____ RR _____ LR _____
04.42	Check Slack adjuster adjusting bolt with a torque wrench @ 13 ft lbs or 156 in/lbs.
04.43	RF _____ LF _____ RR _____ LR _____
04.44	Check slack adjusters Clevis and Pins.
04.45	Check rear Brake Chambers vent tubes for cracking.
04.46	Do brake stroke measurement with 90 to 100 PSI Gillig Fronts 2" ,Rear 2" Max.
04.47	Applied RF _____ LF _____ RR _____ LR _____.
04.48	Brakes released RF _____ LF _____ RR _____ LR _____.
04.49	Stroke length RF _____ LF _____ RR _____ LR _____.
04.50	Record tire air pressure. - 120 PSI Front and Rear cold.
04.51	LF _____ RF _____ LRI _____ LRO _____ RRI _____ RRO _____
04.60	Record tire tread depth - Minimum of 4/32" on Fronts & Rears
04.61	LF _____ RF _____ LRI _____ LRO _____ RRI _____ RRO _____
04.70	Clean differential breather, check for fluid leaks
04.80	Undercarriage inspection.
04.90	Tie rods and ends.
05.10	Check king pins and front wheel bearing adjustment.
05.20	Check steering gear and linkage.
05.21	Check steering gear mounting plate for cracks.
05.30	Check wheel seals.
05.40	Check air bags.
05.50	Check lateral & radius rod bushings.
05.60	Check drive line and u-joints.
05.70	Check shocks and bushings.
05.80	Check engine and transmission mounts; cradle supports.
05.90	Lube chassis.- Lube S- cams & Anchor pins. 1 pump by hand pump only.
05.91	Remove cover - inspect & lube lower steering shaft
06.10	Drain 4 air tanks at front of bus & check for excess moisture.
06.20	Check ground straps, battery cables, terminals, and starter connections.
06.30	Clean battery Tops. Load test @ DECA 700 CCA & 950 Interstate battery.

**SALEM AREA MASS TRANSIT DISTRICT**  
**Inspection Checklist Items**

Inspection Id: GI35

Type: C

Item Number	Description
06.31	1) _____ 2) _____ 3) _____ 4) _____
06.40	Clean driver's heater filter.
06.41	Lube Zirks on outside mirrors-only one short shot
06.42	Lube entrance & exit door lube points
06.43	Remove 3 access covers on steering column & lube upper steering shaft
06.50	Tighten intake clamps, check air compressor inlet hose condition.
06.63	Change starter at 110,00 miles. Last done at _____
06.64	If equipped with AD-9 Cartridge change every 36,000 miles and service purge valve assembly Date _____ Mileage _____
06.65	If equipped with Dual Turbo 2000 spin cartridge change every 72,000 miles and service purge valve assembly.DATE _____ Mileage _____
06.72	Remove belt covers ,check belts,Idlers pulleys bearings & tensioner.
06.80	Check condition of alternator belt and power steering pump belt.
06.81	Check AC compressor drive belt (200 lbs +/- 10 lbs)
06.90	Check fuel, oil, coolant, air, transmission, & PS lines in engine compartment.
07.30	Check exhaust system and muffler.
07.40	Check all side compartment door latches, clean and lube.
07.50	Wheel stud nuts - check for proper torque (450 to 500 ft/lbs).
07.52	Check to ensure blow-off caps are in place on all 4 fire suppression nozzles.
07.53	Amerex electrical actuator has self life of 12 years and in service life of 6 years. Date in service _____
07.55	Check for exterior body damage, note on photo page.
07.56	Change AC drier if moisture indicator not green.
07.58	Lube AC clutch with one pump of designated grease.
07.59	Lube evaporator motor shaft bearings.
07.60	Check evaporator drains are clear. Check evaporator compartment and clean as needed..
07.61	Check condenser compartment and clean as needed.
07.62	If equipped with change DEF system filter at pump and inline every 200,000 miles Part # 08000113 & 08000190--Mileage _____ Date _____
07.63	Adjust valves.
07.64	Change crankcase breather filter.
07.66	Clear engine codes with lap top.
07.68	Remove hard drive .View hard drive for about 2 min, to make sure all cameras and sound are working normal. Reinstall hard drive and check to see if system reboots and says: System OK.
07.69	Check recorder date and time,make sure it is set to the present time and date.

**SALEM AREA MASS TRANSIT DISTRICT  
Inspection Checklist Items**

Inspection Id: GI35  
Type: C

Item Number	Description
07.70	Check driver seat condition and lube sliders with Lift U chain lube.
07.71	Change driver seat bottom cushion & cover every 16 to 18 month. Date last done: _____01000870
08.10	Clean wheel chair ramp area.
08.11	Check chain tension and condition, dry lube.
08.12	Check platform hold straight out,(2 lb weight)
08.13	Dry lube pivot points and pins.
08.14	Check operation of wheel chair ramp and tie down system.
08.15	Check Wheel chair ramp torque on drive sprocket screws-(130 inch lbs. use blue loctite)
08.30	Check tanks regulators behind driver head for 23 lbs setting (+, -- ,3 lbs)
08.78	Check DVI books-1 book they are using, 1 last 30 days used, 1 new book, all others remove.
08.98	Check & Fill day pass in Fare box. DO NOT OVER FILL
09.00	Clean swipe card & trim with cleaning card.
09.05	Clean coin insert slot.
09.07	Clean Coin Validator externally & internally.
09.09	Clean, lube & inspect Coin Validator soleniod
09.11	Clean Bill Validator externally & internally.
09.13	Inspect & clean trim belts & pulleys
09.17	Clean & inspect trim black rubber rollers
09.37	Bill Transport - lube & inspect.
09.38	Pressure check cooling system--Should hold 16 lbs.
10.05	Check toe-in on front tires.
10.06	Road test on return check for leaks and fluid levels.
10.07	Check interior cleanliness to make sure it is presentable for the public before parking.

**SALEM AREA MASS TRANSIT DISTRICT**  
**Inspection Checklist Items**

Inspection Id: GI35  
Type: B

Item Number	Description
02.93	3-4 - Disinfectant towelettes
02.94	2-3 - Pair Latex Gloves
02.95	1 ea - CPR Microshield
02.96	1 ea - Red Biohazard Bag
03.00	Check destination signs - operation, lights, glass.
03.10	Allow air compressor to build to 125 lbs., cut off pressure, shut off engine.
03.20	Loss of air pressure in one minute - brake. Record loss _____
03.29	Clean water spots on mirrors and drivers window areas.
03.30	Steam clean engine, transmission, radiator, & undercarriage before inspection and road test.
03.32	Steam clean fuel tank
03.34	Open rear fenders & steam clean
03.40	Road test - check engine performance, steering, suspension noise, transmission, and shift points.
03.41	1st ____ mph 2nd ____ mph 3rd ____ mph 4th ____
03.42	Perform shop test with digital recorder - Route code 9999
03.51	Decel test Service brakes _____ % _____ foot from 20 mph
03.52	Decel test Park brake _____ % _____ foot from 20 mph.
03.58	Check fire suppression bottle gauge in green area
03.59	Drain ping air tank, valve at RR corner of bus under bumper
03.60	Check all fluid levels - engine oil, power steering fluid, transmission, coolant.
03.61	Check and clean DEF vent tube if equipped on DEF tank.
03.62	Change spin on fuel filter.
03.63	Check Processor filter fuel level, change if needed.
03.70	Sample Transmission fluid at operating temperature.
03.80	Change oil and filters, take sample at operating temperature. Use back up wrench when removing drain plug Torque drain plug 32ft/lbs
03.81	Change hydraulic fluid
03.82	Change hydraulic oil filter
03.83	Change coolant filter CAUTION: Turn coolant line valves back on after filter change.
04.10	Check fuel, oil, water, air, trans. & PS lines under bus for rubbing, kinks, frays & leaks
04.20	Check exhaust system manifold and turbo for leaks.
04.30	Brake Linings - check wear line.
04.31	RF _____ LF _____ RR _____ LR _____
04.40	Check roller to cam positions.

**SALEM AREA MASS TRANSIT DISTRICT  
Inspection Checklist Items**

Inspection Id: GI35

Type: B

Item Number	Description
04.41	RF _____ LF _____ RR _____ LR _____
04.42	Check Slack adjuster adjusting bolt with a torque wrench @ 13 ft lbs or 156 in/lbs.
04.43	RF _____ LF _____ RR _____ LR _____
04.44	Check slack adjusters Clevis and Pins.
04.45	Check rear Brake Chambers vent tubes for cracking.
04.46	Do brake stroke measurement with 90 to 100 PSI Gillig Fronts 2" ,Rear 2" Max.
04.47	Applied                    RF _____ LF _____ RR _____ LR _____
04.48	Brakes released        RF _____ LF _____ RR _____ LR _____
04.49	Stroke length          RF _____ LF _____ RR _____ LR _____
04.50	Record tire air pressure. - 120 PSI Front and Rear cold.
04.51	LF _____ RF _____ LRI _____ LRO _____ RRI _____ RRO _____
04.60	Record tire tread depth - Minimum of 4/32" on Fronts & Rears
04.61	LF _____ RF _____ LRI _____ LRO _____ RRI _____ RRO _____
04.70	Clean differential breather, check for fluid leaks
04.80	Undercarriage inspection.
04.90	Tie rods and ends.
05.10	Check king pins and front wheel bearing adjustment.
05.20	Check steering gear and linkage.
05.21	Check steering gear mounting plate for cracks.
05.30	Check wheel seals.
05.40	Check air bags.
05.50	Check lateral & radius rod bushings.
05.60	Check drive line and u-joints.
05.70	Check shocks and bushings.
05.80	Check engine and transmission mounts; cradle supports.
05.90	Lube chassis.- Lube S- cams & Anchor pins. 1 pump by hand pump only.
06.10	Drain 4 air tanks at front of bus & check for excess moisture.
06.20	Check ground straps, battery cables, terminals, and starter connections.
06.30	Clean battery Tops. Load test @ DECA 700 CCA & 950 Interstate battery. ...
06.31	1) _____ 2) _____ 3) _____ 4) _____
06.40	Clean driver's heater filter.
06.41	Replace engine breather filter

**SALEM AREA MASS TRANSIT DISTRICT**  
**Inspection Checklist Items**

Inspection Id: GI35  
 Type: B

Item Number	Description
06.50	Tighten intake clamps, check air compressor inlet hose condition.
06.70	Check air filter minder - change filter if in red area. Date filter when changed.
06.72	Remove belt covers ,check belts,ldlers pulleys bearings & tensioner.
06.80	Check condition of alternator belt and power steering pump belt.
06.81	Check AC compressor drive belt (200 lbs +/- 10 lbs)
06.90	Check fuel, oil, coolant, air, transmission, & PS lines in engine compartment.
07.30	Check exhaust system and muffler.
07.40	Check all side compartment door latches, clean and lube.
07.50	Wheel stud nuts - check for proper torque (450 to 500 ft/lbs).
07.51	Clear engine code with lap top.
07.52	Remove hard drive.View hard drive for about 2 min, to make sure all cameras and sound are working normal. Reinstall hard drive and check to see if system reboots and says: System OK.
07.53	Check recorder date and time,make sure it is set to the present time and date.
07.54	Check driver seat condition and lube sliders with Lift U chain lube.
08.10	Clean wheel chair ramp area.
08.11	Check chain tension and condition, dry lube.
08.12	Check platform holds straight out (2 lbs weight ).
08.13	Dry lube pivot points and pins.
08.14	Check operation of wheel chair ramp and tie down system.
08.15	Check Wheel chair ramp torque on drive sprocket screws-(130 inch lbs. use blue loctite)
08.20	Check tanks regulators behind driver head for 23 lbs setting (+, -- ,3 lbs)
08.74	Check DVI books-1 book they are using, 1 last 30 days used, 1 new book, all others remove.
08.98	Check & Fill day pass in Fare box. DO NOT OVER FILL
09.00	Clean swipe card & trim with cleaning card.
09.05	Clean coin insert slot.
09.07	Clean Coin Validator externally & internally.
09.09	Clean, lube & inspect Coin Validator soleniod
09.11	Clean Bill Validator externally & internally.
09.13	Inspect & clean trim belts & pulleys
09.17	Clean & inspect trim black rubber rollers
09.18	Pressure check cooling system --Should hold 16 lbs.
09.21	Road test on return check for leaks and fluid levels.
09.22	Check interior cleanliness to make sure it is presentable for the public before parking.



**Cherriots – Gillig Inspections**  
**D Service**

**SALEM AREA MASS TRANSIT DISTRICT**  
**Inspection Checklist Items**

Inspection Id: GI35  
 Type: D

Item Number	Description
01.00	Date _____ Mileage _____ WO# _____ IND# _____
01.01	Probe Fare box, before starting service.
01.05	Install protective seat cover on drivers seat
01.10	Fire Suppression System Check:
01.11	A. Fire suppression green LED on.
01.12	B. All other LED's off.
01.13	C. Press to test, bell and relay engaged LED on. Push Relay Reset to clear
01.20	Check brake and accelerator pedal action and feel, pump down air system.
01.21	Check throttle pedal spring on electronic control pedal.
01.25	Check seat belt cutter is properly mounted
01.30	Check warning buzzer, horn, tell tale lamps, driver's controls, and gauges.
01.40	Check parking brake operation holds without movement. Idle to full throttle -- max 2 sec.
01.50	Check brake and accelerator interlock.
01.60	Check tilt steering wheel adjustment and telescope.
01.70	Check kneel operation and adjustments.
01.80	Check turn signals.
01.81	Farebox mounting
01.90	Check door operation - speeds and sensitive edges.
02.20	Check interior and exterior for damage, missing parts, decals, seats, stanchions, vents, panels, and locks.
02.30	Check window operations including emergency features.
02.31	Check vandal guard film for damage and scratches, and note if replacement is needed.
02.40	Check all interior and exterior lights.
02.50	Check back-up lights and horn.
02.60	Check bike rack - lube latch, hinges, and check all for proper operation.
02.70	Check windshield wipers and washers. Rinse windshield - do not allow soap to dry.
02.71	Fill windshield washer reservoir
02.80	Check for intact red tie on emergency triangle box - repl as needed.
02.81	Check expiration date on fire extinguisher - replace if needed.
02.89	Check paper towel and puke bag
02.90	Check driver's first aid box for an intact seal. If seal is broken, check contents and restock items as necessary (see list below)
02.91	10 ea - Band-aids (+/- 1 or 2)
02.92	3-4 - Gauze pads

**SALEM AREA MASS TRANSIT DISTRICT  
Inspection Checklist Items**

Inspection Id: GI35

Type: D

Item Number	Description
02.93	3-4 - Disinfectant towelettes
02.94	2-3 - Pair Latex Gloves
02.95	1 ea - CPR Microshield
02.96	1 ea - Red Biohazard Bag
03.00	Check destination signs - operation, lights, glass.
03.10	Allow air compressor to build to 125 lbs., cut off pressure, shut off engine.
03.20	Loss of air pressure in one minute - brake. Record loss _____
03.25	Clean Heaters and Evaporator coil areas, and change filter only if it is determined filter is plugged.
03.31	Clean water spots on mirrors and drivers window areas.
03.32	Steam clean engine, transmission, radiator, & undercarriage before inspection and road test.
03.33	Steam clean fuel tank area.
03.34	Open rear fenders & steam clean
03.40	Road test - check engine performance, steering, suspension noise, transmission, and shift points.
03.41	1st ___ mph 2nd ___ mph 3rd ___ mph 4th ___
03.42	Perform shop test with digital recorder - Route code 9999
03.51	Decel test Service brakes _____ % _____ foot from 20 mph
03.52	Decel test Park brake _____ % _____ foot from 20 mph.
03.53	AC check freon level.
03.59	Drain ping air tank, valve at RR corner of bus under bumper
03.60	Check all fluid levels - engine oil, power steering fluid, transmission, coolant.
03.61	Check and clean DEF vent tube if equipped on DEF tank.
03.62	Change spin on fuel filter. (20000032)
03.63	Check processor filter fuel level, change if needed. (20000021)
03.64	Sample & Change transmission fluid and filter, drain convertor.
03.78	Change rear axle gear oil. (FL000008)
03.80	Change oil and filters, take sample at operating temperature. Use back up wrench when removing drain plug Torque drain plug 32ft/lbs (FL20000026)
03.81	Change hydraulic oil filter (20000034)
03.82	Change hydraulic fluid
03.83	Change antifreeze ( FL000005)
03.84	Change coolant filter CAUTION: Turn coolant line valves back on after filter change.
04.10	Check fuel, oil, water, air, trans. & PS lines under bus for rubbing, kinks, frays & leaks
04.20	Check exhaust system manifold and turbo for leaks.

**SALEM AREA MASS TRANSIT DISTRICT  
Inspection Checklist Items**

Inspection Id: GI35  
Type: D

Item Number	Description
04.30	Brake Linings - check wear line.
04.31	RF _____ LF _____ RR _____ LR _____
04.40	Check roller to cam positions.
04.41	RF _____ LF _____ RR _____ LR _____
04.42	Check Slack adjuster adjusting bolt with a torque wrench @ 13 ft lbs or 156 in/lbs.
04.43	RF _____ LF _____ RR _____ LR _____
04.44	Check slack adjusters Clevis and Pins.
04.45	Check rear Brake Chambers vent tubes for cracking.
04.46	Do brake stroke measurement with 90 to 100 PSI Gillig Fronts 2" ,Rear 2" Max.
04.47	Applied RF _____ LF _____ RR _____ LR _____
04.48	Brakes released RF _____ LF _____ RR _____ LR _____
04.49	Stroke length RF _____ LF _____ RR _____ LR _____
04.50	Record tire air pressure. - 120 PSI Front and Rear cold.
04.51	LF _____ RF _____ LRI _____ LRO _____ RRI _____ RRO _____
04.60	Record tire tread depth - Minimum of 4/32" on Fronts & Rears
04.61	LF _____ RF _____ LRI _____ LRO _____ RRI _____ RRO _____
04.70	Clean differential breather
04.80	Undercarriage inspection.
04.90	Tie rods and ends.
05.10	Check king pins and front wheel bearing adjustment.
05.20	Check steering gear and linkage.
05.21	Check steering gear mounting plate for cracks.
05.30	Check wheel seals.
05.40	Check air bags.
05.50	Check lateral & radius rod bushings.
05.60	Check drive line and u-joints.
05.70	Check shocks and bushings.
05.80	Check engine and transmission mounts; cradle supports.
05.90	Lube chassis.- Lube S- cams & Anchor pins. 1 pump by hand pump only.
05.91	Remove cover - inspect & lube lower steering shaft
06.10	Drain 4 air tanks at front of bus & check for excess moisture.
06.20	Check ground straps, battery cables, terminals, and starter connections.

**SALEM AREA MASS TRANSIT DISTRICT**  
**Inspection Checklist Items**

Inspection Id: GI35  
Type: D

Item Number	Description
06.30	Clean battery Tops. Load test @ DECA 700 CCA & 950 Interstate batteries. .
06.31	1) _____ 2) _____ 3) _____ 4) _____
06.40	Clean driver's heater filter.
06.41	Lube Zirks on outside mirrors-only one short shot
06.42	Lube entrance & exit door lube points
06.43	Remove 3 access covers on steering column & lube upper steering shaft
06.50	Tighten intake clamps, check air compressor inlet hose condition.
06.63	Change starter at 110,000 miles. Last done at _____ (06001052)
06.64	If equipped with AD-9 Cartridge change every 36,000 miles and service purge valve assembly Date _____ Mileage _____ (06000985)
06.65	If equipped with Dual Turbo 2000 spin cartridge change every 72,000 miles and service purge valve assembly.DATE _____ Mileage _____ (06001219)
06.70	Change air filter. Mileage & Date last done. _____ (20000013--20007--20000038-- 2011)
06.72	Remove belt covers ,check belts,Idlers pulleys bearings & tensioner.
06.80	Check condition of alternator belt and power steering pump belt.
06.81	Check AC compressor drive belt (200 lbs +/- 10 lbs)
06.90	Check fuel, oil, coolant, air, transmission, & PS lines in engine compartment.
07.30	Check exhaust system and muffler.
07.40	Check all side compartment door latches, clean and lube.
07.50	Wheel stud nuts - check for proper torque (450 to 500 ft/lbs).
07.51	Check Amerex fire suppression bottle gauge, needle should be in green range.
07.52	Check to ensure blow-off caps are in place on all 4 fire suppression nozzles.
07.53	Amerex electrical actuator has self life of 12 years and in service life of 6 years. Date in service _____
07.55	Check for exterior body damage, note on photo page.
07.56	Change AC drier if moisture indicator not green.
07.58	Lube AC clutch with one pump of designated grease.
07.59	Lube evaporator motor shaft bearings.
07.60	Check evaporator drains are clear. Check evaporator compartment and clean as needed.
07.61	Check condenser compartment and clean as needed.
07.62	If equipped with change DEF system filter at pump and inline every 200,000 miles Part # 08000113 & 08000190--Mileage _____ Date _____
07.63	Adjust valves
07.64	Change crankcase breather filter. (20000033)

**SALEM AREA MASS TRANSIT DISTRICT  
Inspection Checklist Items**

Inspection Id: GI35  
Type: D

Item Number	Description
07.65	Replace DPF, clean cat, reset with laptop-Mileage _____ Date _____ last done. R08000128-2012--R08000087--2007)
07.66	Clear engine codes with lap top.
07.68	Remove hard drive.View hard drive for about 2 min, to make sure all cameras and sound are working normal. Reinstall hard drive and check to see if system reboots and says: System OK.
07.69	Check recorder date and time,make sure it is set to the present time and date.
07.70	Check driver seat condition and lube sliders with Lift U Chain lube.
07.71	Change driver seat bottom cushion & cover every 16 to 18 month. Date last done: _____ (01000870)
08.10	Clean wheel chair ramp area.
08.11	Check chain tension and condition, dry lube.
08.12	Check platform hold straight out (2 lb weight )
08.13	Dry lube pivot points and pins.
08.14	Check operation of wheel chair ramp and tie down system.
08.15	Check Wheel chair ramp torque on drive sprocket screws-(130 inch lbs. use blue loctite)
08.20	Inspect & Repack Front Wheel beainingsMileage _____ Date _____ Last done,(72,000 miles) (05000294)
08.30	Check tanks regulators behind driver head for 23 lbs setting (+, -- ,3 lbs)
08.85	Check DVI books-1 book they are using, 1 last 30 days used, 1 new book, all others remove.
08.98	Check & Fill day pass in Fare box. DO NOT OVER FILL
09.00	Clean swipe card & trim with cleaning card.
09.05	Clean coin insert slot.
09.07	Clean Coin Validator externally & internally.
09.09	Clean, lube & inspect Coin Validator soleniod
09.11	Clean Bill Validator externally & internally.
09.13	Inspect & clean trim belts & pulleys
09.17	Clean & inspect trim black rubber rollers
09.27	Clean & lube Cash box locking mechanism coin & bill stripper
09.29	Lube electronic lock drive gear & drive stud
09.37	Bill Transport - lube & inspect.
09.39	Cash Box - clean & lube locking mechanism, clean slides. USE GREASE SPARINGLY ! THANK YOU
09.41	Cash Box - replace battery every 3 years.
09.42	Mark date battery was replaced on cash box.
09.43	Electronic Lock & Locking Bar - lube drive gear & stud.
09.44	Electronic Lock Door Switch - check & adjust if necessary.

**SALEM AREA MASS TRANSIT DISTRICT  
Inspection Checklist Items**

Inspection Id: GI35  
Type: D

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Item Number	Description
09.45	Coin Bypass - clean, lube & inspect.
09.46	Pressure check cooling system--Should hold 16 lbs.
10.05	Check toe-in on front tires.
10.06	Road test on return check for leaks and fluid levels.
10.07	Check interior cleanliness to make sure it is presentable for the public before parking.

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# Cherriots – LIFT Inspections

## A Service

### SALEM AREA MASS TRANSIT DISTRICT Inspection Checklist Items

Inspection Id: CLG  
Type: A

Item Number	Description
01.00	Date _____ Mileage _____ WO# _____ IND# _____.
01.05	Install protective seat cover on drivers seat
01.20	Check brake and accelerator pedal action and feel,
01.30	Check horn, tell tale lamps, driver's controls, and gauges.
01.40	Check parking brake operation -- holds on a slope.
01.50	Check brake and accelerator interlock.
01.60	Check tilt steering wheel adjustment and telescope.
01.80	Check turn signals.
01.90	Check door operation - sensitive edges.
02.10	Check wheelchair tie-down straps, seat belts, and fold-up seats..
02.20	Check interior and exterior for damage, missing parts, decals, seats, stanchions, vents, panels, and locks.
02.30	Check window operations including emergency features.
02.40	Check all interior and exterior lights.
02.50	Check back-up lights and horn.
02.60	Check drivers mirror mounting and adjustment.
02.70	Check windshield wipers and washers. Rinse windshield - do not allow soap to dry.
02.71	Check engine belts-Fan -A/C -Alt etc.
02.73	Check Brake Fluid Level
02.77	Check power steering fluid level.
02.80	Fill windshield washer reservoir.
03.30	Steam clean engine, transmission & radiator, before inspection and road test.
03.40	Road test - check engine performance, steering, suspension noise, transmission, and shift points.
03.41	1st ____ mph 2nd ____ mph 3rd ____ mph 4th ____
03.51	Decel test Service brakes _____ % _____ foot from 20 mph
03.60	Check Transmission Fluid Level.
03.81	Change oil and filter, take sample at operating temperature. Torque plug , 5w30 oil. 7QT FORD-6QT CHEVY
04.10	Check fuel, oil, water, air, trans. & PS lines under bus for rubbing, kinks, frays & leaks
04.20	Check exhaust system.
04.30	Brake Linings - check wear for wear 6MM OK- 5MM or less brakes Due.
04.31	RF _____ LF _____ RR _____ LR _____
04.50	Record tire air pressure. Fronts 80 psi- Rears 80 psi --cold--
04.51	LF _____ RF _____ LRI _____ LRO _____ RRI _____ RRO _____

**SALEM AREA MASS TRANSIT DISTRICT  
Inspection Checklist Items**

Inspection Id: CLG  
Type: A

Item Number	Description
04.60	Record tire tread depth - Minimum of 6/32" on Fronts & 4/32 Rears
04.61	LF _____ RF _____ LRI _____ LRO _____ RRI _____ RRO _____
04.70	Clean differential breather, check for fluid leaks
04.80	Undercarriage inspection.
04.90	Tie rods and ends.
05.10	Check ball joints-upper & lower -check front wheel bearing adjustment.
05.20	Check steering gear and linkage.
05.30	Check wheel seals.
05.60	Check drive line and u-joints & center support bearing.
05.70	Check shocks and bushings.
05.80	Check engine and transmission mounts; cradle supports.
05.90	Lube chassis.
05.92	CHECK hoses to rear heaters-they should be soft.
06.20	Check ground straps, battery cables, terminals, and starter connections.
06.30	Clean battery tops and terminals if needed-Check water level-
06.32	Clean battery compartment. Load test both batteries.
06.34	1) _____ 2) _____
06.40	Clean or replace heater filter on rear heater-A/C.
06.90	Check fuel, oil, coolant, air, transmission, & PS lines in engine compartment.
07.40	Check all side compartment door latches, clean and lube.
07.50	Wheel stud nuts - check for proper torque.150-165lbs
07.51	If equipped; Remove hard drive.View hard drive for about 2 min, to make sure all cameras and sound are working normal. CHECK DATE, Time & Bus number.
07.53	Lube W/C & rear exit door key locks with dry lube
07.60	Check W/C operation
07.70	Lube W/C pivot points & check fasteners.
07.80	Check inner barrier operation.
07.81	Check outer barrier operation.
07.82	Check Threshold Warning Plate Alarm
07.83	Check cigarette lighter port and power port for power if equipped.
07.87	Check file for drivers defects (DVI)
07.88	Reset oil change light.-if equipped.
07.90	Take for a SHORT test drive & check for leaks and fluid levels.



# Cherriots – LIFT Inspections

## B Service

### SALEM AREA MASS TRANSIT DISTRICT Inspection Checklist Items

Inspection Id: CLG  
Type: B

Item Number	Description
01.00	Date _____ Mileage _____ WO# _____ IND# _____
01.05	Install protective seat cover on drivers seat
01.20	Check brake and accelerator pedal action and feel,
01.30	Check horn, tell tale lamps, driver's controls, and gauges.
01.40	Check parking brake operation -- holds on a slope.
01.50	Check brake and accelerator interlock.
01.60	Check tilt steering wheel adjustment and telescope.
01.80	Check turn signals.
01.90	Check door operation - sensitive edges.
02.10	Check wheelchair tie-down straps, seat belts, and fold-up seats.
02.20	Check interior and exterior for damage, missing parts, decals, seats, stanchions, vents, panels, and locks.
02.30	Check window operations including emergency features.
02.40	Check all interior and exterior lights.
02.50	Check back-up lights and horn.
02.60	Check drivers mirror mounting and adjustment.
02.70	Check windshield wipers and washers. Rinse windshield - do not allow soap to dry.
02.71	Check engine belts-Fan -A/C -Alt etc.
02.73	Check Brake Fluid Level
02.77	Check power steering fluid level.
02.80	Fill windshield washer reservoir.
03.30	Steam clean engine, transmission & radiator, before inspection and road test.
03.40	Road test - check engine performance, steering, suspension noise, transmission, and shift points.
03.41	1st _____ mph 2nd _____ mph 3rd _____ mph 4th _____
03.51	Decel test Service brakes _____ % _____ foot from 20 mph
03.60	Check Transmission Fluid Level.
03.81	Change oil and filter, take sample at operating temperature. Torque plug , 5w30 oil. 7QT FORD-6QT CHEVY
04.10	Check fuel, oil, water, air, trans. & PS lines under bus for rubbing, kinks, frays & leaks
04.20	Check exhaust system.
04.30	Brake Linings - check wear for wear.6 MM OK-5 MM or less brakes Due.
04.31	RF _____ LF _____ RR _____ LR _____
04.50	Record tire air pressure. Fronts 80 psi- Rears 80 psi --cold--
04.51	LF _____ RF _____ LRI _____ LRO _____ RRI _____ RRO _____

**SALEM AREA MASS TRANSIT DISTRICT  
Inspection Checklist Items**

Inspection Id: CLG  
Type: B

Item Number	Description
04.60	Record tire tread depth - Minimum of 6/32" on Fronts & 4/32 Rears
04.61	LF _____ RF _____ LRI _____ LRO _____ RRI _____ RRO _____
04.70	Clean differential breather, check for fluid leaks
04.80	Undercarriage inspection.
04.90	Tie rods and ends.
05.10	Check ball joints-upper & lower -check front wheel bearing adjustment.
05.20	Check steering gear and linkage.
05.30	Check wheel seals.
05.60	Check drive line and u-joints & center support bearing.
05.70	Check shocks and bushings.
05.80	Check engine and transmission mounts; cradle supports.
05.90	Lube chassis.
05.92	CHECK hoses to rear heaters-they should be soft.
06.20	Check ground straps, battery cables, terminals, and starter connections.
06.30	Clean battery tops and terminals if needed-Check water level- Load test batteries.
06.32	Clean battery compartment. Load test both batteries.
06.34	1) _____ 2) _____
06.40	Clean or replace heater filter on rear heater-A/C.
06.90	Check fuel, oil, coolant, air, transmission, & PS lines in engine compartment.
07.10	Check coolant protection level (-25 to -40)
07.40	Check all side compartment door latches, clean and lube.
07.45	Rotate or flip rear Tires from side to side if needed. Fronts if side walls are bad.
07.50	Wheel stud nuts - check for proper torque.150-165 lbs
07.52	If equipped; Remove hard drive.View hard drive for about 2 min, to make sure all cameras and sound are working normal. CHECK DATE, Time & Bus number.
07.53	Lube W/C & rear exit door key locks with dry lube
07.60	Check W/C operation
07.70	Lube W/C Pivot points & check fastners.
07.80	Check inner barrier operation.
07.81	Check outer barrier operation.
07.82	Check Threshold Warning Plate Alarm
07.83	Check cigarette lighter port and power port for power if equipped.
07.87	Check file for driver defects-(DVI)

**SALEM AREA MASS TRANSIT DISTRICT**  
**Inspection Checklist Items**

Inspection Id: CLG  
Type: B

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Item Number	Description
07.88	Reset oil change light.-if equipped.
07.90	Take for a SHORT test drive & check for leaks and fluid levels.

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# Cherriots – LIFT Inspections

## C Service

### SALEM AREA MASS TRANSIT DISTRICT Inspection Checklist Items

Inspection Id: CLG  
Type: C

Item Number	Description
01.00	Date _____ Mileage _____ WO# _____ IND# _____
01.05	Install protective seat cover on drivers seat
01.20	Check brake and accelerator pedal action and feel,
01.30	Check horn, tell tale lamps, driver's controls, and gauges.
01.40	Check parking brake operation -- holds on a slope.
01.50	Check brake and accelerator interlock.
01.60	Check tilt steering wheel adjustment and telescope.
01.80	Check turn signals.
01.90	Check door operation
02.10	Check wheelchair tie-down straps, seat belts, and fold-up seats.
02.20	Check interior and exterior for damage, missing parts, decals, seats, stanchions, vents, panels, and locks.
02.30	Check window operations including emergency features.
02.40	Check all interior and exterior lights.
02.50	Check back-up lights and horn.
02.60	Check drivers mirror mounting and adjustment.
02.70	Check windshield wipers and washers. Rinse windshield - do not allow soap to dry.
02.71	Check engine belts-Fan -A/C -Alt etc.
02.73	Check Brake Fluid Level
02.77	Check power steering fluid level.
02.80	Fill windshield washer reservoir.
03.30	Steam clean engine, transmission & radiator, before inspection and road test.
03.40	Road test - check engine performance, steering, suspension noise, transmission, and shift points.
03.41	1st _____ mph 2nd _____ mph 3rd _____ mph 4th _____
03.51	Decel test Service brakes _____ % _____ foot from 20 mph
03.60	Check Transmission Fluid Level.
03.81	Change oil and filter, take sample at operating temperature. Torque plug , 5w30 oil. 7QT FORD-6QT CHEVY
03.85	Replace Trans pick up filter- change ATF- Fill with 9qts Mercon LV- ARBOC 7QTS DEXRON VI
04.10	Check fuel, oil, water, air, trans. & PS lines under bus for rubbing, kinks, frays & leaks
04.20	Check exhaust system.
04.30	Brake Linings - check wear for wear.6MM OK- 5MM or less brakes Due
04.31	RF _____ LF _____ RR _____ LR _____
04.50	Record tire air pressure. Fronts 80 psi- Rears 80 psi --cold-

**SALEM AREA MASS TRANSIT DISTRICT  
Inspection Checklist Items**

Inspection Id: CLG

Type: C

Item Number	Description
04.51	LF _____ RF _____ LRI _____ LRO _____ RRI _____ RRO _____
04.60	Record tire tread depth - Minimum of 6/32" on Fronts & 4/32 Rears
04.61	LF _____ RF _____ LRI _____ LRO _____ RRI _____ RRO _____
04.70	Clean differential breather, check for fluid leaks
04.80	Undercarriage inspection.
04.90	Tie rods and ends.
05.10	Check ball joints-upper & lower -check front wheel bearing adjustment.
05.20	Check steering gear and linkage.
05.30	Check wheel seals.
05.60	Check drive line and u-joints & center support bearing.
05.70	Check shocks and bushings.
05.80	Check engine and transmission mounts; cradle supports.
05.90	Lube chassis.
05.92	CHECK hoses to rear heaters-they should be soft.
06.00	Replace fuel filter-ARBOC & 2010 buses do not have a inline fuel filter.
06.10	Replace air cleaner
06.20	Check ground straps, battery cables, terminals, and starter connections.
06.30	Clean battery tops and terminals if needed-Check water level- Load test batteries.
06.32	Clean battery compartment. Load test both batteries.
06.34	1) _____ 2) _____
06.40	Clean or replace heater filter on rear heater-A/C.
06.90	Check fuel, oil, coolant, air, transmission, & PS lines in engine compartment.
07.10	Check coolant protection level (-25 to -40)
07.40	Check all side compartment door latches, clean and lube.
07.45	Rotate or flip rear Tires from side to side if needed. Fronts if side walls are bad.
07.50	Wheel stud nuts - check for proper torque.150-165 lbs
07.52	If equipped; Remove hard drive.View hard drive for about 2 min, to make sure all cameras and sound are working normal. CHECK DATE, Time & Bus number.
07.53	Lube W/C & rear exit door key locks with dry lube
07.60	Check W/C operation
07.70	Lube W/C Pivot points & check fastners.
07.72	Remove pump module cover & inspect hoses, fittings, connections,cables, fuses & relays
07.75	Inspect micro switches for security & adjustment

**SALEM AREA MASS TRANSIT DISTRICT**  
**Inspection Checklist Items**

Inspection Id: CLG  
Type: C

Item Number	Description
07.80	Check inner barrier operation.
07.81	Check outer barrier operation.
07.82	Check Threshold Warning Plate Alarm
07.83	Check cigarette lighter port and power port for power if equipped.
07.87	Check file for drivers defects-DVI
07.88	Reset oil change light.-if equipped.
07.90	Take for a SHORT test drive & check for leaks and fluid levels.

# Cherriots – LIFT Inspections

## D Service

### SALEM AREA MASS TRANSIT DISTRICT Inspection Checklist Items

Inspection Id: CLG  
Type: D

Item Number	Description
01.00	Date _____ Mileage _____ WO# _____ IND# _____
01.05	Install protective seat cover on drivers seat
01.20	Check brake and accelerator pedal action and feel,
01.30	Check horn, tell tale lamps, driver's controls, and gauges.
01.40	Check parking brake operation -- holds on a slope.
01.50	Check brake and accelerator interlock.
01.60	Check tilt steering wheel adjustment and telescope.
01.80	Check turn signals.
01.90	Check door operation
02.10	Check wheelchair tie-down straps, seat belts, and fold-up seats.
02.20	Check interior and exterior for damage, missing parts, decals, seats, stanchions, vents, panels, and locks.
02.30	Check window operations including emergency features.
02.40	Check all interior and exterior lights.
02.50	Check back-up lights and horn.
02.60	Check drivers mirror mounting and adjustment.
02.70	Check windshield wipers and washers. Rinse windshield - do not allow soap to dry.
02.71	Check engine belts-Fan -A/C -Alt etc.
02.73	Check Brake Fluid Level
02.77	Check power steering fluid level.
02.80	Fill windshield washer reservoir.
03.30	Steam clean engine, transmission & radiator, before inspection and road test.
03.40	Road test - check engine performance, steering, suspension noise, transmission, and shift points.
03.41	1st ___ mph 2nd ___ mph 3rd ___ mph 4th ___
03.51	Decel test Service brakes _____ % _____ foot from 20 mph
03.60	Check Transmission Fluid Level.
03.81	Change oil and filter, take sample at operating temperature. Torque plug , 5w30 oil. 7QT FORD-6QT CHEVY
03.85	Replace Trans pick up filter- change ATF- Fill with 9qts Mercon LV- ARBOC 7QTS DEXRON VI
03.90	Change differential fluid -use 75W-90W fluid 5gallon can
03.91	Clean differential breather, check for fluid leaks
04.00	Change Anti-Freeze
04.10	Check fuel, oil, water, air, trans. & PS lines under bus for rubbing, kinks, frays & leaks
04.20	Check exhaust system.

**SALEM AREA MASS TRANSIT DISTRICT  
Inspection Checklist Items**

Inspection Id: CLG  
Type: D

Item Number	Description
04.30	Brake Linings - check wear for wear.6MM OK- 5 MM or less brakes Due.
04.31	RF _____ LF _____ RR _____ LR _____
04.50	Record tire air pressure. Fronts 80 psi- Rears 80 psi --cold-
04.51	LF _____ RF _____ LRI _____ LRO _____ RRI _____ RRO _____
04.60	Record tire tread depth - Minimum of 6/32" on Fronts & 4/32 Rears
04.61	LF _____ RF _____ LRI _____ LRO _____ RRI _____ RRO _____
04.80	Undercarriage inspection.
04.90	Tie rods and ends.
05.10	Check ball joints-upper & lower -check front wheel bearing adjustment.
05.20	Check steering gear and linkage.
05.30	Check wheel seals.
05.60	Check drive line and u-joints & center support bearing.
05.70	Check shocks and bushings.
05.80	Check engine and transmission mounts; cradle supports.
05.90	Lube chassis.
05.92	CHECK hoses to rear heaters-they should be soft.
06.00	Replace fuel filter-2010 buses do not have a inline fuel filter.
06.10	Replace Air cleaner
06.20	Check ground straps, battery cables, terminals, and starter connections.
06.30	Clean battery tops and terminals if needed-Check water level- Load test batteries.
06.32	Clean battery compartment. Load test both batteries.
06.34	1) _____ 2) _____
06.40	Clean or replace heater filter on rear heater-A/C.
06.90	Check fuel, oil, coolant, air, transmission, & PS lines in engine compartment.
07.10	Check coolant protection level (-25 to -40)
07.40	Check all side compartment door latches, clean and lube.
07.42	Repack front wheel bearings-ARBOC FT BEARINGS ARE SEALED UNIT-NOT SERVICABLE
07.43	Rotate or flip rear Tires from side to side if needed. Fronts if side walls are bad.
07.44	Replace PCV valve-NO PCV ON ARBOC
07.45	Replace Spark Plugs-ARBOC GAP .043-11 FT LBS. TORQUE
07.50	Wheel stud nuts - check for proper torque.150-165lbs
07.52	If equipped; Remove hard drive.View hard drive for about 2 min, to make sure all cameras and sound are working normal. CHECK DATE, Time & Bus number.



**SALEM AREA MASS TRANSIT DISTRICT**  
**Inspection Checklist Items**

Inspection Id: CLG  
Type: D

Item Number	Description
07.53	Lube W/C & rear exit door key locks with dry lube
07.60	Check W/C LIFToperation
07.70	Lube W/C Pivot points & check fastners.
07.72	Remove pump module cover & inspect hoses, fittings, connections,cables, fuses & relays
07.73	Check fluid level-change if fluid looks contaminated.
07.75	Inspect micro switches for security & adjustment
07.80	Check outer barrier operation.
07.81	Check inner barrier operation.
07.82	Check Threshold Warning Plate Alarm
07.83	Check cigarette lighter port and power port for power if equipped.
07.85	CHECK TOE IN-1/8 TO 5/32 ALL VEHICLES
07.87	Check file for drivers defects-DVI
07.88	Reset oil change light.-if equipped.
07.90	Take for a SHORT test drive & check for leaks and fluid levels.

**Cherriots – Orion VII Inspections**  
**A Service**

**SALEM AREA MASS TRANSIT DISTRICT**  
**Inspection Checklist Items**

Inspection Id: 0740  
 Type: A

Item Number	Description
01.00	Date _____ Mileage _____ WO# _____ IND# _____
01.01	Probe Fare box, before starting service.
01.05	Install protective seat cover on drivers seat
01.10	Gas Detector Fire Suppression Check:
01.11	A. Fire suppression green LED on.
01.12	B. Gas detection green LED on.
01.13	C. All other LED's off.
01.14	D. Press to test - all LED's for significant, trace and sensor fault on.
01.20	Check brake and accelerator pedal action and feel, pump down air system.
01.21	Check throttle pedal spring on electronic control pedal.
01.25	Check seat belt cutter is properly mounted
01.30	Check warning buzzer, horn, tell tale lamps, driver's controls, and gauges.
01.40	Check parking brake operation holds without movement. Idle to full throttle -- max 2 sec.
01.50	Check brake and accelerator interlock.
01.60	Check tilt steering wheel adjustment and lock.
01.70	Check kneel operation and adjustments.
01.80	Check turn signals.
01.81	Fare box mounting
01.90	Check door operation - speeds and sensitive edges.
02.10	Check wheelchair ramp operation, for leaks, and fluid level.
02.11	Check tie-down straps, seat belts, wheel locks, and fold-up seat.
02.20	Check interior and exterior for damage, missing parts, decals, seats, stanchions, vents, panels, and locks.
02.30	Check window operations including emergency features.
02.31	Check vandal guard film for damage and scratches, and note if replacement is needed.
02.40	Check all interior and exterior lights.
02.50	Check back-up lights and horn.
02.80	Check for intact red tie on emergency triangle box - repl as needed.
02.81	Check expiration date on fire extinguisher - replace if needed.
02.89	Check paper towel and puke bag
02.90	Check driver's first aid box for an intact seal. If seal is broken, check contents and restock items as necessary (see list below)
02.91	10 ea - Band-aids (+/- 1 or 2)
02.92	3-4 - Gauze pads

**SALEM AREA MASS TRANSIT DISTRICT**  
**Inspection Checklist Items**

Inspection Id: 0740  
Type: A

Item Number	Description
02.93	3-4 - Disinfectant towelettes
02.94	2-3 - Pair Latex Gloves
02.95	1 ea - CPR Microshield
02.96	1 ea - Red Biohazard Bag
03.00	Check destination signs - operation, lights, glass.
03.10	Allow air compressor to build to 125 lbs., cut off pressure, shut off engine.
03.20	Loss of air pressure in one minute - brake. Record loss _____
03.22	Check windshield wipers and washers. Rinse windshield - do not allow soap to dry.
03.23	Fill windshield washer reservoir
03.28	Clean water spots on mirrors and drivers window areas.
03.29	Before steam clean engine cover marine pump with something to keep it dry.
03.31	Steam clean engine, transmission, radiator,& undercarriage before inspection and road test.
03.32	Perform shop test with digital recorder - Route code 9999
03.40	Road test - check engine performance, steering, suspension noise, transmission, and shift points.
03.41	1st ____ mph 2nd ____ mph 3rd ____ mph 4th ____ 5th ____
03.51	Decel test Service brakes _____ % _____ foot from 20 mph
03.52	Decel test Park brake _____ % _____ foot from 20 mph.
03.60	Check all fluid levels - engine oil, power steering fluid, transmission, coolant.
03.62	HYD TANK-FLUID SHOULD ONLY COVER LOWER SIGHT GLASS
03.70	Check fuel fill door safety switch - Engine should die when door is opened.
03.80	Change oil and filters, take sample at operating temperature. Locktite 592 Sealer on threads. Torque drain plug 35-40 ft/lbs
03.97	Clean differential breather and check for fluid leaks & fluid level.
04.10	Check fuel, oil, water, air, trans. & PS lines under bus for rubbing, kinks, frays& leaks
04.20	Check exhaust system manifold and turbo for leaks.
04.30	Brake Linings - check wear line.
04.31	RF _____ LF _____ RR _____ LR _____
04.40	Check roller to cam positions.
04.41	RF _____ LF _____ RR _____ LR _____
04.42	Check Slack adjuster adjusting bolt with a torque wrench @ 13 ft lbs or 156 in/lbs.
04.43	RF _____ LF _____ RR _____ LR _____
04.44	Check slack adjusters Clevis and Pins.
04.45	Check rear Brake Chambers vent tubes for cracking.

**SALEM AREA MASS TRANSIT DISTRICT**  
**Inspection Checklist Items**

Inspection Id: 0740  
Type: A

Item Number	Description
04.46	Do brake stroke measurement with 90 to 100 PSI Orion 7 Fronts 2",Rears 2 3/8" Max.
04.47	Applied            RF _____ LF _____ RR _____ LR _____.
04.48	Brakes released    RF _____ LF _____ RR _____ LR _____.
04.49	Stroke length      RF _____ LF _____ RR _____ LR _____.
04.50	Record tire air pressure. Orion VII - 115 front -120 rear psi cold.
04.51	LF _____ RF _____ LRI _____ LRO _____ RRI _____ RRO _____
04.60	Record tire tread depth - Minimum of 4/32" on Fronts & Rears
04.61	LF _____ RF _____ LRI _____ LRO _____ RRI _____ RRO _____
04.80	Undercarriage inspection.
04.90	Tie rods and ends.
05.10	Check king pins and front wheel bearing adjustment.
05.20	Check steering gear and linkage.
05.30	Check wheel seals. Verify correct gear oil level on front hubs.
05.40	Check air bags.
05.50	Check lateral & radius rod bushings.
05.60	Check drive line and u-joints.
05.70	Check shocks and bushings.
05.80	Check engine and transmission mounts; cradle supports.
05.90	Lube chassis.- Lube S- cams & Anchor pins. 1 pump by hand pump only.
06.10	Drain air tanks under bus & check for excess moisture.
06.20	Check ground straps, battery cables, terminals, and starter connections.
06.30	Clean battery Tops. Load test @ DECA 700 CCA & 950 Interstate batteries. .
06.31	1) _____ 2) _____ 3) _____ 4) _____
06.40	Clean driver's heater filter.
06.50	Tighten intake clamps, check air compressor inlet hose condition.
06.60	Change crankcase breather filter.
06.70	Check air filter minder - change filter if in red area. Date filter when changed.
06.71	Remove belt covers ,check belts,Idlers pulleys bearings & tensioner.
06.80	Check condition of alternator belt and power steering pump belt.
06.81	Check AC compressor drive belt (200 lbs +/- 10 lbs)
06.90	Check fuel, oil, coolant, air, transmission, & PS lines in engine compartment.
07.10	Drain air tanks above engine and check for moisture.

**SALEM AREA MASS TRANSIT DISTRICT**  
**Inspection Checklist Items**

Inspection Id: 0740

Type: A

Item Number	Description
07.30	Check exhaust system and muffler.
07.40	Check all side compartment door latches, clean and lube.
07.41	Check bike rack - lube latch, hinges, and check all for proper operation.
07.50	Wheel stud nuts - check for proper torque (450 to 500 ft/lbs).
07.60	Check Amerex fire suppression bottle gauge - should be in the green zone.
08.71	Remove hard drive. View hard drive for about 2 min, to make sure all cameras and sound are working normal. Reinstall hard drive and check to see if system reboots and says: System OK.
08.72	Check recorder date and time ,make sure it is set the same as the present time and date.
08.73	Clear engine codes with lap top. Check and set Date and time on ECM Detroit only.
08.74	Check DVI books-1 book they are using, 1 last 30 days used, 1 new book, all others remove.
08.98	Check & Fill day pass in Fare box. DO NOT OVER FILL
09.00	Clean swipe card & trim with cleaning card.
09.05	Clean coin insert slot.
09.07	Clean Coin Validator externally & internally.
09.08	Pressure check cooling system.-Should hold 10 lbs.
09.11	Road test on return check for leaks and fluid levels.
09.12	Check interior cleanliness to make sure it is presentable for the public before parking.

**Cherriots – Orion VII Inspections**  
**B Service**

**SALEM AREA MASS TRANSIT DISTRICT**  
**Inspection Checklist Items**

Inspection Id: 0735  
 Type: B

Item Number	Description
01.00	Date _____ Mileage _____ WO# _____ IND# _____
01.01	Probe Fare box, before starting service.
01.05	Install protective seat cover on drivers seat
01.10	Gas Detector Fire Suppression Check:
01.11	A. Fire suppression green LED on.
01.12	B. Gas detection green LED on.
01.13	C. All other LED's off.
01.14	D. Press to test - all LED's for significant, trace and sensor fault on.
01.20	Check brake and accelerator pedal action and feel, pump down air system.
01.21	Check throttle pedal spring on electronic control pedal.
01.25	Check seat belt cutter is properly mounted
01.30	Check warning buzzer, horn, tell tale lamps, driver's controls, and gauges.
01.40	Check parking brake operation holds without movement. Idle to full throttle -- max 2 sec.
01.50	Check brake and accelerator interlock.
01.60	Check tilt steering wheel adjustment and lock.
01.70	Check kneel operation and adjustments.
01.80	Check turn signals.
01.81	Farebox mounting
01.90	Check door operation - speeds and sensitive edges.
02.10	Check wheelchair ramp operation, for leaks, and fluid level.
02.11	Check tie-down straps, seat belts, wheel locks, and fold-up seat.
02.20	Check interior and exterior for damage, missing parts, decals, seats, stanchions, vents, panels, and locks.
02.30	Check window operations including emergency features.
02.31	Check vandal guard film for damage and scratches, and note if replacement is needed.
02.40	Check all interior and exterior lights.
02.50	Check back-up lights and horn.
02.80	Check for intact red tie on emergency triangle box - repl as needed.
02.81	Check expiration date on fire extinguisher - replace if needed.
02.89	Check paper towel and puke bag
02.90	Check driver's first aid box for an intact seal. If seal is broken, check contents and restock items as necessary (see list below)
02.91	10 ea - Band-aids (+/- 1 or 2)
02.92	3-4 - Gauze pads

**SALEM AREA MASS TRANSIT DISTRICT**  
**Inspection Checklist Items**

Inspection Id: 0735  
Type: B

Item Number	Description
02.93	3-4 - Disinfectant towelettes
02.94	2-3 - Pair Latex Gloves
02.95	1 ea - CPR Microshield
02.96	1 ea - Red Biohazard Bag
03.00	Check destination signs - operation, lights, glass.
03.10	Allow air compressor to build to 125 lbs., cut off pressure, shut off engine.
03.20	Loss of air pressure in one minute - brake. Record loss _____
03.21	Check windshield wipers and washers. Rinse windshield - do not allow soap to dry.
03.22	Fill windshield washer reservoir
03.25	Clean water spots on mirrors and drivers window areas.
03.29	Before steam cleaning engine cover marine pump with something to keep it dry.
03.30	Steam clean engine, transmission, radiator, & undercarriage, before inspection and road test.
03.31	Perform shop test with digital recorder - Route code 9999
03.40	Road test - check engine performance, steering, suspension noise, transmission, and shift points.
03.41	1st ___ mph 2nd ___ mph 3rd ___ mph 4th ___ 5th ___
03.51	Decel test Service brakes _____ % _____ foot from 20 mph
03.52	Decel test Park brake _____ % _____ foot from 20 mph.
03.60	Check all fluid levels - engine oil, power steering fluid, transmission, coolant.
03.62	HYD TANK-FLUID SHOULD ONLY COVER LOWER SIGHT GLASS
03.70	Check fuel fill door safety switch - Engine should die when door is opened.
03.75	Sample Trans fluid at operating temperature if pan is painted red.
03.80	Change oil and filters, take sample at operating temperature. Lockite 592 Sealer on threads. Torque drain plug 35-40 ft/lbs
03.97	Clean differential breather and check for fluid leaks & fluid level.
04.10	Check fuel, oil, water, air, trans. & PS lines under bus for rubbing, kinks, frays & leaks
04.20	Check exhaust system manifold and turbo for leaks.
04.30	Brake Linings - check wear line.
04.31	RF _____ LF _____ RR _____ LR _____
04.40	Check roller to cam positions.
04.41	RF _____ LF _____ RR _____ LR _____
04.42	Check Slack adjuster adjusting bolt with a torque wrench @ 13 ft lbs or 156 in/lbs.
04.43	RF _____ LF _____ RR _____ LR _____
04.44	Check slack adjuster Clevis and pin.

**SALEM AREA MASS TRANSIT DISTRICT**  
**Inspection Checklist Items**

Inspection Id: 0735  
 Type: B

Item Number	Description
04.45	Check rear Brakes Chamber vent tubes for cracking.
04.46	Do brake stroke measurement with 90 to 100PSI Orion 7 fronts 2" ,rears 2 3/8. Max.
04.47	Applied                    RF _____ LF _____ RR _____ LR _____
04.48	Brakes released        RF _____ LF _____ RR _____ LR _____
04.49	Stroke Length        RF _____ LF _____ RR _____ LR _____
04.50	Record tire air pressure. Orion VII - 115 front -120 rear psi cold
04.51	LF _____ RF _____ LRI _____ LRO _____ RRI _____ RRO _____
04.60	Record tire tread depth - Minimum of 4/32" on Fronts & Rears
04.61	LF _____ RF _____ LRI _____ LRO _____ RRI _____ RRO _____
04.80	Undercarriage inspection.
04.90	Tie rods and ends.
05.10	Check king pins and front wheel bearing adjustment.
05.20	Check steering gear and linkage.
05.30	Check wheel seals. Verify correct gear oil level on front hubs.
05.40	Check air bags.
05.50	Check lateral & radius rod bushings.
05.60	Check drive line and u-joints.
05.70	Check shocks and bushings.
05.80	Check engine and transmission mounts; cradle supports.
05.90	Lube chassis. --Lube S-cams & Anchor pins -1 pump with hand grease gun only.
06.10	Drain air tanks under bus & check for excess moisture.
06.20	Check ground straps, battery cables, terminals, and starter connections.
06.30	Clean battery Tops. Load test @ DECA 700 CCA & 950 CCA Interstate batteries. .
06.31	1) _____ 2) _____ 3) _____ 4) _____
06.40	Clean driver's heater filter.
06.50	Tighten intake clamps, check air compressor inlet hose condition.
06.60	Change crankcase breather filter.
06.70	Check air filter minder - change filter if in red area. Date filter when changed.
06.71	Remove belt covers and check belts, idler pulleys, and tensioner for condition.
06.80	Check condition of alternator belt and power steering pump belt.
06.81	Check AC compressor drive belt (200 lbs +/- 10 lbs)
06.90	Check fuel, oil, coolant, air, transmission, & PS lines in engine compartment.



**SALEM AREA MASS TRANSIT DISTRICT**  
**Inspection Checklist Items**

Inspection Id: 0735  
Type: B

Item Number	Description
07.10	Drain air tanks above engine and check for moisture.
07.30	Check exhaust system and muffler.
07.40	Check all side compartment door latches, clean and lube.
07.41	Check bike rack - lube latch, hinges, and check all for proper operation.
07.50	Wheel stud nuts - check for proper torque (450 to 500 ft/lbs).
07.60	Check Amerex fire suppression bottle gauge - should be in the green zone.
07.61	Check driver seat condition and lube sliders with Lift U chain lube.
08.71	Remove hard drive. View hard drive for about 2 min, to make sure all cameras and sound are working normal. Reinstall hard drive and check to see if system reboots and says: System OK.
08.72	Check recorder date and time. Make sure it is set the same as the present time and date.
08.73	Clear engine codes with lap top. Check and set Date and time on ECM Detroit's only.
08.74	Check DVI books-1 book they are using, 1 last 30 days used, 1 new book, all others remove.
08.98	Check & Fill day pass in Fare box. DO NOT OVER FILL
09.00	Clean swipe card & trim with cleaning card.
09.05	Clean coin insert slot.
09.07	Clean Coin Validator externally & internally.
09.09	Clean, lube & inspect Coin Validator solenoid
09.11	Clean Bill Validator externally & internally.
09.13	Inspect & clean trim belts & pulleys
09.14	Clean & inspect trim black rubber rollers
09.17	Pressure check cooling system.-Should hold 10 lbs.
09.18	Road test on return check for leaks and fluid levels.
09.19	Check interior cleanliness to make sure it is presentable for the public before parking.

# Cherriots – Orion VII Inspections

## C Service

### SALEM AREA MASS TRANSIT DISTRICT Inspection Checklist Items

Inspection Id: 0735  
Type: C

Item Number	Description
	cart Check bike rack - lube latch, hinges, and check all for proper operation.
01.00	Date _____ Mileage _____ WO# _____ IND# _____
01.01	Probe Fare box, before starting service.
01.05	Install protective seat cover.
01.10	Gas Detector Fire Suppression Check:
01.11	A. Fire suppression green LED on.
01.12	B. Gas detection green LED on.
01.13	C. All other LED's off.
01.14	D. Press to test - all LED's for significant, trace and sensor fault on.
01.20	Check brake and accelerator pedal action and feel, pump down air system.
01.21	Check throttle pedal spring on electronic control pedal.
01.25	Check seat belt cutter is properly mounted
01.30	Check warning buzzer, horn, tell tale lamps, driver's controls, and gauges.
01.40	Check parking brake operation holds without movement. Idle to full throttle -- max 2 sec.
01.50	Check brake and accelerator interlock.
01.60	Check tilt steering wheel adjustment and lock.
01.70	Check kneel operation and adjustments.
01.80	Check turn signals.
01.90	Check door operation - speeds and sensitive edges.
02.10	Check wheelchair ramp operation, for leaks, and fluid level.
02.11	Check tie-down straps, seat belts, wheel locks, and fold-up seat.
02.20	Check interior and exterior for damage, missing parts, decals, seats, stanchions, vents, panels, and locks.
02.30	Check window operations including emergency features.
02.31	Check vandal guard film for damage and scratches, and note if replacement is needed.
02.35	Farebox mounting
02.40	Check all interior and exterior lights.
02.50	Check back-up lights and horn.
02.80	Check for intact red tie on emergency triangle box - repl as needed.
02.81	Check expiration date on fire extinguisher - replace if needed.
02.90	Check paper towel & puke bag. Check driver's first aid box for an intact seal. If seal is broken, check contents and restock items as necessary (see list below)
02.91	10 ea - Band-aids (+/- 1 or 2)
02.92	3-4 - Gauze pads

**SALEM AREA MASS TRANSIT DISTRICT**  
**Inspection Checklist Items**

Inspection Id: 0735

Type: C

Item Number	Description
02.93	3-4 - Disinfectant towelettes
02.94	2-3 - Pair Latex Gloves
02.95	1 ea - CPR Microshield
02.96	1 ea - Red Biohazard Bag
03.00	Check destination signs - operation, lights, glass.
03.10	Allow air compressor to build to 125 lbs., cut off pressure, shut off engine.
03.20	Loss of air pressure in one minute - brake. Record loss _____
03.21	Check windshield wipers and washers. Rinse windshield - do not allow soap to dry. Fill reservoir.
03.22	Fill windshield washer tank.
03.27	Remove screen & steam clean radiator
03.28	Clean water spots on mirrors and drivers window areas.
03.29	Before steam cleaning engine cover marine pump with something to keep it dry.
03.30	Steam clean engine, transmission, radiator, & undercarriage before inspection and road test.
03.31	Clean Heaters And Evaporator coil area, and change filter only if it is determined filter is plugged.
03.32	Perform shop test with digital recorder-Route Code 9999
03.40	Road test - check engine performance, steering, suspension noise, transmission, and shift points.
03.41	1st _____ mph 2nd _____ mph 3rd _____ mph
03.42	4th _____ mph 5th _____ mph
03.50	Brake decel test.
03.51	Service brakes _____ % _____ foot from 20 mph
03.52	Park brake _____ % _____ foot from 20 mph.
03.53	AC check freon level.
03.60	Check power steering & coolant fluid levels.
03.61	HYD TANK-FLUID SHOULD ONLY COVER LOWER SIGHT GLASS
03.62	Sample trans fluid at operating temperature if pan is painted red.
03.70	Check fuel fill door safety switch - Engine should die when door is opened.
03.72	Shut off fuel at manual shut off valve. Check 500 lbs low fuel warning light & buzzer. .
03.73	Change fuel filters. 20000027
03.80	Perform starter amp. Draw: _____ (max. 600 amps).
03.90	Change oil and filters, take samples of operating temperature.
03.97	Clean differential breather, check for fluid leaks
04.00	Change coolant filter : Caution : Turn shut valves back on.

**SALEM AREA MASS TRANSIT DISTRICT**  
**Inspection Checklist Items**

Inspection Id: 0735  
Type: C

Item Number	Description
04.10	Check fuel, oil, water, air, transmission, and power steering lines for rubbing, kinks, fraying, and leaks under bus.
04.20	Check exhaust system manifold and turbo for leaks.
04.30	Brake Linings - check wear line.
04.31	RF _____ LF _____ RR _____ LR _____
04.40	Check roller to cam positions.
04.41	RF _____ LF _____ RR _____ LR _____
04.42	Check Slack adjuster adjusting bolt with a torque wrench @ 13 ft/lbs or 156 in/lbs
04.43	RF _____ LF _____ RR _____ LR _____
04.44	Check slack adjusters Clevis and Pin
04.45	Check rear Brake Chambers vent tubes for cracking.
04.46	Due brake stroke measurement with 90 to 100 PSI Orion 7 fronts 2" rears 2 3/8" Max.
04.47	Applied RF _____ LF _____ RR _____ LR _____
04.48	Brakes released RF _____ LF _____ RR _____ LR _____
04.49	Stroke length RF _____ LF _____ RR _____ LR _____
04.50	Record tire air pressure. Orion VII - 115 front -120 rear psi cold
04.51	RF _____ LF _____ RRI _____ RRO _____ LRI _____ LRO _____
04.60	Record tire tread depth - Minimum of 4/32" on Fronts & Rears
04.61	RF _____ LF _____ RRO _____ RRI _____ LRO _____ LRI _____
04.90	Undercarriage inspection.
05.00	Tie rods and ends.
05.10	Check king pins and front wheel bearing adjustment.
05.20	Check steering gear and linkage.
05.30	Check wheel seals. Verify correct gear oil level on front hubs.
05.40	Check air bags.
05.50	Check lateral & radius rod bushings.
05.60	Check drive line and u-joints.
05.70	Check shocks and bushings.
05.80	Check engine and transmission mounts; cradle supports.
05.90	Lube chassis. -Lube S-cams & Anchor pins 1 pump by hand grease gun only.
05.91	Drain air tanks under bus & check for excess moisture.
05.95	Lube wheelchair ramp mechanism
06.20	Check ground straps, battery cables, terminals, and starter connections.

**SALEM AREA MASS TRANSIT DISTRICT**  
**Inspection Checklist Items**

Inspection Id: 0735  
Type: C

Item Number	Description
06.30	Clean battery Tops. Load test @ DECA 700 CCA & 950 Interstate battery's. .
06.31	1) _____ 2) _____ 3) _____ 4) _____
06.40	Clean driver's heater filter.
06.42	Lube rollers & zirks on entrance & exit doors
06.43	Lube Zirks on outside mirrors-only one short shot
06.44	Check and Lube grease zirks on upper steering column shaft inside bus.
06.50	Tighten intake clamps, check air compressor inlet hose condition.
06.60	Change crankcase breather filter.
06.72	Remove belt covers ,check belts,Idlers pulleys bearings & tensioner.
06.80	Check condition of alternator belt and power steering pump belt.
06.90	Check fuel, oil, coolant, air, transmission, and power steering lines for rubbing, kinks, fraying, and leaks in engine compartment.
07.10	Drain air tanks above engine and check for moisture.
07.20	Check A/C compressor drive belt (200 lbs. +/- 10 lbs.)
07.30	Check exhaust system and muffler.
07.40	Check all side compartment door latches, clean and lube.
07.50	Wheel stud nuts - check for proper torque (450 to 500 ft/lbs).
07.60	Check Amerex fire suppression bottle gauge - should be in the green zone.
07.70	Check to ensure blow-off caps are in place on all 4 fire suppression nozzles.
07.80	Amerex Electrical Actuator has a shelf life of 12 years and a service life of 6 years. Date in service. _____
07.82	Check for exterior body damage, note on photo page.
08.20	Change hydraulic filter.
08.21	Clean foam filter inside hydraulic tank fill cap-take apart cap.
08.30	Change hydraulic fluid every 108,000 miles. Fluid last changed: _____
08.60	Change AC drier if moisture indicator not green.
08.62	Lube AC clutch with one pump of designated grease.
08.63	Lube evaporator motor shaft bearings.
08.64	Check evaporator compartment drains are clear. Clean compartment as needed
08.66	Check driver seat condition and lube sliders with Lift U chain lube.
08.67	Change driver seat bottom cushion & cover every 16 to 18 month. Date last done:_____01000870__
08.71	Remove hard drive. View hard drive for about 2 min, to make sure all cameras and sound are working normal. Reinstall hard drive and check to see if system reboots and says: System OK.
08.72	Check recorder date and time,make sure it is set the same as the present time and date.

**SALEM AREA MASS TRANSIT DISTRICT**  
**Inspection Checklist Items**

Inspection Id: 0735

Type: C

Item Number	Description
08.73	Clear engine code with lap top, Check and set Date and time on ECM Detroit only.
08.74	Clean air line filter that goes into pressure protection valve, (located above LR supply tank, next to fire extinguisher for fire system.)
08.75	Adjust valves.
08.76	Replace spark plugs in Detroit engines every 72,000 miles. Last done _____ miles.
08.77	Change starter at 120,000 miles. Last done: _____ miles.
08.78	Change AD-9 Cartridge every 36,000 miles and service purge valve assembly Date _____ Mileage _____
08.88	Check DVI books-1 book they are using, 1 last 30 days used, 1 new book, all others remove.
08.98	Check & Fill day pass in Fare box. DO NOT OVER FILL
09.00	Clean swipe card & trim with cleaning card.
09.05	Clean coin insert slot.
09.07	Clean Coin Validator externally & internally.
09.09	Clean, Lube & Inspect Coin Validator solenoid
09.11	Clean Bill Validator externally & internally.
09.13	Inspect & clean trim belts & pulleys
09.15	Clean & inspect trim yellow feed rollers
09.17	Clean & inspect trim black rubber rollers
09.23	Clean & inspect trim solenoids, gears & edge guides
09.37	Bill Transport - lube & inspect.
09.38	Pressure check cooling system.-Should hold 10 lbs.
10.05	Check toe-in on front tires.
10.06	Check condenser, clean as needed
10.07	Perform CNG tank inspection and certification.
10.08	Road test on return check for leaks and fluid levels.
10.09	Check interior cleanliness to make sure it is presentable for the public before parking.

**Cherriots – Orion VII Inspections**  
**D Service**

**SALEM AREA MASS TRANSIT DISTRICT**  
**Inspection Checklist Items**

Inspection Id: 0735

Type: D

Item Number	Description
01.00	Date _____ Mileage _____ WO# _____ IND# _____
01.01	Probe Fare box, before starting service.
01.05	Install protective seat cover.
01.10	Gas Detector Fire Suppression Check:
01.11	A. Fire suppression green LED on.
01.12	B. Gas detection green LED on.
01.13	C. All other LED's off.
01.14	D. Press to test - all LED's for significant, trace and sensor fault on.
01.20	Check brake and accelerator pedal action and feel, pump down air system.
01.21	Check throttle pedal spring on electronic control pedal.
01.25	Check seat belt cutter is properly mounted
01.30	Check warning buzzer, horn, tell tale lamps, driver's controls, and gauges.
01.40	Check parking brake operation holds without movement. Idle to full throttle -- max 2 sec.
01.50	Check brake and accelerator interlock.
01.60	Check tilt steering wheel adjustment and lock.
01.70	Check kneel operation and adjustments.
01.80	Check turn signals.
01.90	Check door operation - speeds and sensitive edges.
02.10	Check wheelchair ramp operation,for leaks,and fluid level.
02.11	Check tie-down straps, seat belts, wheel locks, and fold-up seat.
02.20	Check interior and exterior for damage, missing parts, decals, seats, stanchions, vents, panels, and locks.
02.30	Check window operations including emergency features.
02.31	Check vandal guard film for damage and scratches, and note if replacement is needed.
02.35	Farebox mounting
02.40	Check all interior and exterior lights.
02.50	Check back-up lights and horn.
02.80	Check for intact red tie on emergency triangle box - repl as needed.
02.81	Check expiration date on fire extinguisher - replace if needed.
02.90	Check paper towel & puke bag. Check driver's first aid box for an intact seal. If seal is broken, check contents and restock items as necessary (see list below)
02.91	10 ea - Band-aids (+/- 1 or 2)
02.92	3-4 - Gauze pads
02.93	3-4 - Disinfectant towelettes

**SALEM AREA MASS TRANSIT DISTRICT  
Inspection Checklist Items**

Inspection Id: 0735

Type: D

Item Number	Description
02.94	2-3 - Pair Latex Gloves
02.95	1 ea - CPR Microshield
02.96	1 ea - Red Biohazard Bag
03.00	Check destination signs - operation, lights, glass.
03.10	Allow air compressor to build to 125 lbs., cut off pressure, shut off engine.
03.20	Loss of air pressure in one minute - brake. Record loss _____
03.21	Check windshield wipers and washers. Rinse windshield - do not allow soap to dry. Fill reservoir.
03.22	Fill windshield washer tank.
03.24	Clean Heaters and Evaporator coil area -and change filter only if it is determined filter is plugged.
03.25	Remove screen from radiator before steam cleaning.
03.28	Clean water spots on mirrors and drivers window areas.
03.29	Before steam cleaning engine cover marine pump with something to keep it dry.
03.31	Steam clean engine, transmission, radiator,& undercarriage before inspection and road test.
03.40	Road test - check engine performance, steering, suspension noise, transmission, and shift points.
03.41	1st _____ mph 2nd _____ mph 3rd _____ mph
03.42	4th _____ mph 5th _____ mph
03.43	Perform shop test with digital recorder-Route Code 9999
03.50	Brake decel test.
03.51	Service brakes _____ % _____ foot from 20 mph
03.52	Park brake _____ % _____ foot from 20 mph.
03.53	Sample trans fluid at operating temperature if pan is painted red.engine running - drain out one pint before sample
03.54	AC check freon level.
03.60	Check power steering & coolant fluid levels.
03.70	Check fuel fill door safety switch - Engine should die when door is opened.
03.72	Shut off fuel at manual shut off valve. Check 500 lbs low fuel warning light & buzzer. .
03.73	Change fuel filters.(20000001)
03.80	Perform starter amp. Draw: _____ (max. 600 amps).
03.81	Change trans fluid & filters and refill with Petro Canada fluid-paint pan & dip stick handle red.
03.82	Torque drain pan plug 18-24 ft/lbs. Filter cover bolts 25 ft/lbs.
03.90	Change oil and filters, take samples of operating temperature.(20000009)
03.96	Change rear axle gear oil. (FL000008)
03.97	Clean differential breather, check for fluid leaks



**SALEM AREA MASS TRANSIT DISTRICT**  
**Inspection Checklist Items**

Inspection Id: 0735  
Type: D

Item Number	Description
03.99	Change Antifreeze.(FL000005)
04.00	Change coolant filter : Caution : Turn shut valves back on.(20000029)
04.10	Check fuel, oil, water, air, transmission, and power steering lines for rubbing, kinks, fraying, and leaks under bus.
04.20	Check exhaust system manifold and turbo for leaks.
04.30	Brake Linings - check wear line.
04.31	RF _____ LF _____ RR _____ LR _____
04.40	Check roller to cam positions.
04.41	RF _____ LF _____ RR _____ LR _____
04.42	Check Slack adjuster adjusting bolt with a torque wrench @ 13 ft/lbs or 156 in/lbs
04.43	RF _____ LF _____ RR _____ LR _____
04.44	Check slack adjuster Clevis Pins.
04.45	Check Rear Brakes Chambers vent tubes for cracking.
04.46	Do brake stroke measurement with 90 to 100 PSI Orion 7 Fronts 2", Rears 2 3/8" Max.
04.47	Applied RF _____ LF _____ RR _____ LR _____.
04.48	Brakes released RF _____ LF _____ RR _____ LR _____.
04.49	Stroke Length RF _____ LF _____ RR _____ LR _____.
04.50	Record tire air pressure. Orion VII - 115 front -120 rear psi cold.
04.51	RF _____ LF _____ RRI _____ RRO _____ LRI _____ LRO _____
04.60	Record tire tread depth - Minimum of 4/32" on Fronts & Rears
04.61	RF _____ LF _____ RRO _____ RRI _____ LRO _____ LRI _____
04.90	Undercarriage inspection.
05.00	Tie rods and ends.
05.10	Check king pins and front wheel bearing adjustment.
05.20	Check steering gear and linkage.
05.30	Check wheel seals. Verify correct gear oil level on front hubs.
05.40	Check air bags.
05.50	Check lateral & radius rod bushings.
05.60	Check drive line and u-joints.
05.70	Check shocks and bushings.
05.80	Check engine and transmission mounts; cradle supports.
05.90	Lube chassis.- Lube S- cams & Anchor pins. 1 pump by hand pump only.
05.91	Drain air tanks under bus & check for excess moisture.

**SALEM AREA MASS TRANSIT DISTRICT**  
**Inspection Checklist Items**

Inspection Id: 0735  
 Type: D

Item Number	Description
05.95	Lube wheelchair ramp mechanism
06.20	Check ground straps, battery cables, terminals, and starter connections.
06.30	Clean battery Tops. Load test @ DECA 700 CCA & 950 Interstate batteries. .
06.31	1) _____ 2) _____ 3) _____ 4) _____
06.40	Clean driver's heater filter.
06.42	Lube rollers & zirks on entrance & exit doors
06.43	Lube Zirks on outside mirrors-only one short shot
06.44	Check and Lube grease zirks on upper steering column shaft inside bus.
06.50	Tighten intake clamps, check air compressor inlet hose condition.
06.60	Change crankcase breather filter. (20000012)
06.71	Change air filter at 72,000 miles. Mileage & Date last done _____(20000022)
06.72	Remove belt covers ,check belts,Idlers pulleys bearings & tensioner.
06.80	Check condition of alternator belt and power steering pump belt.
06.90	Check fuel, oil, coolant, air, transmission, and power steering lines for rubbing, kinks, fraying, and leaks in engine compartment.
07.10	Drain air tanks above engine and check for moisture.
07.20	Check A/C compressor drive belt (200 lbs. +/- 10 lbs.)
07.30	Check exhaust system and muffler.
07.40	Check all side compartment door latches, clean and lube.
07.41	Check bike rack - lube latch, hinges, and check all for proper operation.
07.50	Wheel stud nuts - check for proper torque (450 to 500 ft/lbs).
07.60	Check Amerex fire suppression bottle gauge - should be in the green zone.
07.70	Check to ensure blow-off caps are in place on all 4 fire suppression nozzles.
07.80	Amerex Electrical Actuator has a shelf life of 12 years and a service life of 6 years. Date in service. _____
07.82	Check for exterior body damage, note on photo page.
08.20	Change hydraulic filter. (20000023)
08.21	Clean foam filter inside Hydraulic tank fill cap-take apart cap.
08.30	Change hydraulic fluid every 108,000 miles. Fluid last changed: _____
08.31	HYD TANK-FLUID SHOULD ONLY COVER LOWER SIGHT GLASS
08.60	Change AC drier if moisture indicator not green.
08.62	Lube AC clutch with one pump of designated grease.
08.63	Lube evaporator motor shaft bearings.
08.64	Check evaporator compartment drains are clear. Clean compartment as needed

**SALEM AREA MASS TRANSIT DISTRICT**  
**Inspection Checklist Items**

Inspection Id: 0735  
 Type: D

Item Number	Description
08.66	Check driver seat condition and lube sliders with Lift U chain lube.
08.67	Change driver seat bottom cushion & cover every 16 to 18 month. Date last done: _____(01000870)
08.71	Remove hard drive. View hard drive for about 2 min, to make sure all cameras and sound are working normal. Reinstall hard drive and check to see if system reboots and says: System OK.
08.72	Check recorder date and time,make sure it is set the same as the present time and date.
08.73	Clear engine code with lap top,Check and set Date and Time on ECM Detroit's only.
08.74	Change starter at 120,000 miles. Last done: _____ miles.(R06000038)
08.75	Change AD-9 Cartridge every 36,000 miles and service purge valve assembly Date _____ Mileage _____(06000985)
08.76	Clean air line air filter that goes into pressure protection valve.( Located aboce LR supply tank,next to fire extinguisher bottle for fire system.)
08.77	Adjust valves.
08.78	Replace spark plugs in Detroit engines every 72,000 miles. Last done _____ miles.(06001183)
08.80	Inspect & Repack Front Wheel Bearings. Mileage _____ Date _____ last done.(72,000 miles)(05000294)
08.85	Check DVI books-1 book they are using, 1 last 30 days used, 1 new book, all others remove.
08.98	Check & Fill day pass in Fare box. DO NOT OVER FILL
09.00	Clean swipe card & trim with cleaning card.
09.05	Clean coin insert slot.
09.07	Clean Coin Validator externally & internally.
09.09	Clean, lube & inspect Coin Validator soleniod
09.11	Clean Bill Validator externally & internally.
09.13	Inspect & clean trim belts & pulleys
09.15	Clean & inspect trim yellow feed rollers
09.17	Clean & inspect trim black rubber rollers
09.27	Clean & lube Cash box locking mechanism coin & bill stripper
09.29	Lube electronic lock drive gear & drive stud
09.37	Bill Transport -clean, inspect & Lube.
09.39	Cash Box - clean & lube locking mechanism, clean slides. USE GREASE SPARINGLY ! THANK YOU
09.41	Cash Box - every 3 years, replace battery.
09.42	Mark date battery was replaced on cash box.
09.43	Electronic Lock & Locking Bar - lube drive gear & stud.
09.44	Electronic Lock Door Switch - check & adjust if necessary.
09.45	Coin Bypass - clean, lube & inspect.

**SALEM AREA MASS TRANSIT DISTRICT**  
**Inspection Checklist Items**

Inspection Id: 0735  
Type: D

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Item Number	Description
09.46	Pressure check cooling system.-Should hold 10 lbs.
10.06	Check steering stops, adjust if needed. (1/8 inch gap)
10.07	Check toe-in on front tires.
10.08	Check condenser, clean as needed
10.09	Perform CNG tank inspection and certification.
10.10	Road test on return check for leaks and fluid levels.
10.11	Check interior cleanliness to make sure it is presentable for the public before parking.

# Cherriots – Regional Inspections

## A Service

### SALEM AREA MASS TRANSIT DISTRICT Inspection Checklist Items

Inspection Id: KR34

Type: A

Item Number	Description
01.00	Date _____ Mileage _____ WO# _____ IND# _____
01.05	Install protective seat cover on drivers seat
01.20	Brake and accelerator pedal action and feel, pump down air system.
01.22	Check throttle pedal spring on electronic control pedal.
01.30	Warning buzzer, horn, tell tale lamps, drivers' controls, and gauges
01.32	Check route sign operation if equipped.
01.40	Parking Brake operation - holds without movement, idle to 1200 rpm max
01.50	Check brake and accelerator interlock.
01.60	Check tilt steering wheel adjustment and telescope.
01.80	Check turn signals.
01.90	Check door operation - sensitive edges.
02.10	Check wheelchair tie-down straps, seat belts, and fold-up seats.
02.20	Check interior and exterior for damage, missing parts, decals, seats, stanchions, vents, panels, and locks.
02.30	Check window operations including emergency features.
02.40	Check all interior and exterior lights.
02.50	Check back-up lights and horn.
02.60	Check drivers mirror mounting and adjustment.
02.70	Check windshield wipers and washers. Rinse windshield - do not allow soap to dry.
02.71	Check engine belts-Fan -A/C -Alt etc.
02.73	Check Brake Fluid Level
02.77	Check power steering fluid level.
02.80	Fill windshield washer reservoir.
02.85	Bike rack - lube latch, hinges, and check all for proper operation
02.87	* Allow air compressor to build to 130lbs., cut off pressure, shut off engine.
02.88	Loss of air pressure in one minute, brake and accelerator applied. Record Loss _____
03.30	Steam clean engine, transmission & radiator, before inspection and road test.
03.31	REMOVE SIDE DOOR & CLEAN RADIATOR AS IF TOMORROW WILL BE 100 DEGREES
03.40	Road test - check engine performance, steering, suspension noise, transmission, and shift points.
03.41	1st ___ mph 2nd ___ mph 3rd ___ mph 4th ___
03.51	Decel test Service brakes _____ % _____ foot from 20 mph
03.60	Check Transmission Fluid Level.
03.80	Sample Engine Oil at operating Temperature
04.10	Check fuel, oil, water, air, trans. & PS lines under bus for rubbing, kinks, frays & leaks

**SALEM AREA MASS TRANSIT DISTRICT  
Inspection Checklist Items**

Inspection Id: KR34  
Type: A

Item Number	Description
04.20	Check exhaust system.
04.30	Brake Linings - check wear for wear.
04.31	RF _____ LF _____ RR _____ LR _____
04.50	Record tire air pressure. 100 PSI 22.5 TIRE-110 PSI 19.5 TIRE
04.51	LF _____ RF _____ LRI _____ LRO _____ RRI _____ RRO _____
04.60	Record tire tread depth - Minimum of 6/32" on Fronts & 4/32" REARS
04.61	LF _____ RF _____ LRI _____ LRO _____ RRI _____ RRO _____
04.63	Check brake stroke measurement with 90 to 100 PSI --- Fronts 1 3/4" Rears 2".
04.64	Applied RF _____ LF _____ RR _____ LR _____
04.65	Released RF _____ LF _____ RR _____ LR _____
04.66	Stroke Length RF _____ LF _____ RR _____ LR _____
04.70	Clean differential breather, check for fluid leaks
04.80	Undercarriage inspection.
04.82	Soap Air Bags and Check For Leaks
04.84	
04.90	Tie rods and ends.
05.10	Check KING PINS & Front wheel bearing adjustment.
05.20	Check steering gear and linkage.
05.30	Check wheel seals.
05.60	Check drive line and u-joints & center support bearing.
05.70	Check shocks and bushings.
05.80	Check engine and transmission mounts; cradle supports.
05.90	Lube chassis.
06.05	Check air cleaner filter minder & reset.
06.20	Check ground straps, battery cables, terminals, and starter connections.
06.30	Clean battery tops and terminals if needed-Check water level-
06.32	Clean battery compartment. Load test both batteries.
06.34	1) _____ 2) _____
06.40	Clean or replace heater filter on rear heater-A/C.
06.90	Check fuel, oil, coolant, air, transmission, & PS lines in engine compartment.
07.40	Check all side compartment door latches, clean and lube.
07.49	Check front wheel oil level

**SALEM AREA MASS TRANSIT DISTRICT**  
**Inspection Checklist Items**

Inspection Id: KR34  
Type: A

Item Number	Description
07.50	Wheel stud nuts - check for proper torque.
07.51	If equipped; Remove hard drive.View hard drive for about 2 min, to make sure all cameras and sound are working normal. CHECK DATE, Time & bus number.
07.53	Lube W/C & rear exit door key locks with dry lube
07.60	Check W/C lift operation
07.70	Lube W/C Pivot points & check fastners.
07.80	Check inner barrier operation.
07.81	Check outer barrier operation.
07.82	Check Threshold Warning Plate Alarm
07.83	Check cigarette lighter port and power port for power if equipped.
07.87	Check file for driver defect sheets.
07.90	Take for a SHORT test drive & check for leaks and fluid level after defects are completed.

**Cherriots – Regional Inspections**  
**B Service**

**SALEM AREA MASS TRANSIT DISTRICT**  
**Inspection Checklist Items**

Inspection Id: KR34  
 Type: B

Item Number	Description
01.00	Date _____ Mileage _____ WO# _____ IND# _____
01.05	Install protective seat cover on drivers seat
01.20	Brake and accelerator pedal action and feel, pump down air system.
01.22	Check throttle pedal spring on electronic control pedal.
01.30	Warning buzzer, horn, tell tale lamps, drivers' controls, and gauges
01.32	Check route sign operation if equipped.
01.40	Parking Brake operation - holds without movement, idle to 1200 rpm max
01.50	Check brake and accelerator interlock.
01.60	Check tilt steering wheel adjustment and telescope.
01.80	Check turn signals.
01.90	Check door operation - sensitive edges.
02.10	Check wheelchair tie-down straps, seat belts, and fold-up seats.
02.20	Check interior and exterior for damage, missing parts, decals, seats, stanchions, vents, panels, and locks.
02.30	Check window operations including emergency features.
02.40	Check all interior and exterior lights.
02.50	Check back-up lights and horn.
02.60	Check drivers mirror mounting and adjustment.
02.70	Check windshield wipers and washers. Rinse windshield - do not allow soap to dry.
02.71	Check engine belts-Fan -A/C -Ait etc.
02.73	Check Brake Fluid Level
02.77	Check power steering fluid level.
02.80	Fill windshield washer reservoir.
02.87	* Allow air compressor to build to 130lbs., cut off pressure, shut off engine.
02.88	Loss of air pressure in one minute, brake and accelerator applied. Record Loss _____
020.8	Bike rack - lube latch, hinges, and check all for proper operation
03.30	Steam clean engine, transmission & radiator, before inspection and road test.
03.31	REMOVE SIDE DOOR & CLEAN RADIATOR AS IF TOMORROW WILL BE 100 DEGREES
03.40	Road test - check engine performance, steering, suspension noise, transmission, and shift points.
03.41	1st ____ mph 2nd ____ mph 3rd ____ mph 4th ____
03.51	Decel test Service brakes _____ % _____ foot from 20 mph
03.60	Check Transmission Fluid Level.
03.80	Change oil and filter, take sample at operating temperature. Torque plug,use ECO Oil 15/40 oil
04.10	Check fuel, oil, water, air, trans. & PS lines under bus for rubbing, kinks, frays & leaks



**SALEM AREA MASS TRANSIT DISTRICT**  
**Inspection Checklist Items**

Inspection Id: KR34  
 Type: B

Item Number	Description
04.20	Check exhaust system.
04.30	Brake Linings - check wear for wear.
04.31	RF _____ LF _____ RR _____ LR _____
04.50	Record tire air pressure. Fronts psi- Rears psi --cold
04.51	LF _____ RF _____ LRI _____ LRO _____ RRI _____ RRO _____
04.60	Record tire tread depth - Minimum of 6/32" on Fronts & 4/32" Rears
04.61	LF _____ RF _____ LRI _____ LRO _____ RRI _____ RRO _____
04.63	Check brake stroke measurement with 90 to 100 PSI --- Fronts 1 3/4" Rears 2".
04.64	Applied RF _____ LF _____ RR _____ LR _____.
04.65	Released RF _____ LF _____ RR _____ LR _____.
04.66	Stroke Length RF _____ LF _____ RR _____ LR _____.
04.70	Clean differential breather, check for fluid leaks
04.80	Undercarriage inspection.
04.82	Soap Air Bags and Check For Leaks
04.90	Tie rods and ends.
05.10	Check King Pins -check front wheel bearing adjustment.
05.20	Check steering gear and linkage.
05.30	Check wheel seals.
05.60	Check drive line and u-joints & center support bearing.
05.70	Check shocks and bushings.
05.80	Check engine and transmission mounts; cradle supports.
05.90	Lube chassis.
06.00	Replace fuel filters.
06.05	Check air cleaner filter minder & reset.
06.20	Check ground straps, battery cables, terminals, and starter connections.
06.30	Clean battery tops and terminals if needed-Check water level- Load test batteries.
06.32	Clean battery compartment. Load test both batteries.
06.34	1) _____ 2) _____
06.40	Clean or replace heater filter on rear heater-A/C.
06.90	Check fuel, oil, coolant, air, transmission, & PS lines in engine compartment.
07.01	Replace crank case breather filter-BUS 358 & 359 ONLY
07.10	Check coolant protection level (-25 to -40); check Nalcool with test strip (minimum = 10)

**SALEM AREA MASS TRANSIT DISTRICT**  
**Inspection Checklist Items**

Inspection Id: KR34

Type: B

Item Number	Description
07.40	Check all side compartment door latches, clean and lube.
07.45	Rotate or flip rear Tires from side to side if needed. Fronts if side walls are bad.
07.49	Check front wheel oil level
07.50	Wheel stud nuts - check for proper torque. Lbs
07.51	If equipped; Remove hard drive. View hard drive for about 2 min, to make sure all cameras and sound are working normal. CHECK DATE, Time & bus number.
07.53	Lube W/C & rear exit door key locks with dry lube
07.60	Check W/C operation
07.70	Lube W/C Pivot points & check fasteners
07.80	Check inner barrier operation.
07.81	Check outer barrier operation
07.82	Check Thershold warning plate.
07.83	Check cigarette lighter port and power port for power if equipped.
07.87	Check file for driver defect sheets.
07.90	Take for a SHORT test drive & check for leaks and fluid levels. After PM defects are completed.

# Cherriots – Regional Inspections

## C Service

### SALEM AREA MASS TRANSIT DISTRICT Inspection Checklist Items

Inspection Id: KR34

Type: C

Item Number	Description
01.00	Date _____ Mileage _____ WO# _____ IND# _____
01.05	Install protective seat cover on drivers seat
01.20	Brake and accelerator pedal action and feel, pump down air system.
01.22	Check throttle pedal spring on electronic control pedal.
01.30	Warning buzzer, horn, tell tale lamps, drivers' controls, and gauges
01.32	Check route sign operation if equipped.
01.40	Parking Brake operation - holds without movement, idle to 1200 rpm max
01.50	Check brake and accelerator interlock.
01.60	Check tilt steering wheel adjustment and telescope.
01.80	Check turn signals.
01.90	Check door operation - sensitive edges.
02.10	Check wheelchair tie-down straps, seat belts, and fold-up seats.
02.20	Check interior and exterior for damage, missing parts, decals, seats, stanchions, vents, panels, and locks.
02.30	Check window operations including emergency features.
02.40	Check all interior and exterior lights.
02.50	Check back-up lights and horn.
02.60	Check drivers mirror mounting and adjustment.
02.70	Check windshield wipers and washers. Rinse windshield - do not allow soap to dry.
02.71	Check engine belts-Fan -A/C -Alt etc.
02.73	Check Brake Fluid Level
02.77	Check power steering fluid level.
02.80	Fill windshield washer reservoir.
02.85	Bike rack - lube latch, hinges, and check all for proper operation
02.87	* Allow air compressor to build to 130lbs., cut off pressure, shut off engine.
02.88	Loss of air pressure in one minute, brake and accelerator applied. Record Loss _____
03.30	Steam clean engine, transmission & radiator, before inspection and road test.
03.31	REMOVE SIDE DOOR & CLEAN RADIATOR AS IF TOMORROW WILL BE 100 DEGREES
03.40	Road test - check engine performance, steering, suspension noise, transmission, and shift points.
03.41	1st ___ mph 2nd ___ mph 3rd ___ mph 4th ___
03.51	Decel test Service brakes _____ % _____ foot from 20 mph
03.60	Check Transmission Fluid Level.
03.80	Change oil and filter, take sample at operating temperature. Torque plug, use ECO Oil 15/40 oil.
03.85	Replace Trans Filters & ATF-use Mercon V- in the over head reels

**SALEM AREA MASS TRANSIT DISTRICT**  
**Inspection Checklist Items**

Inspection Id: KR34

Type: C

Item Number	Description
04.10	Check fuel, oil, water, air, trans. & PS lines under bus for rubbing, kinks, frays & leaks
04.20	Check exhaust system.
04.30	Brake Linings - check wear for wear.
04.31	RF _____ LF _____ RR _____ LR _____
04.50	Record tire air pressure. Fronts psi- Rears psi --cold
04.51	LF _____ RF _____ LRI _____ LRO _____ RRI _____ RRO _____
04.60	Record tire tread depth - Minimum of 6/32" on Fronts & 4/32 Rears
04.61	LF _____ RF _____ LRI _____ LRO _____ RRI _____ RRO _____
04.63	Check brake stroke measurement with 90 to 100 PSI --- Fronts 1 3/4" Rears 2".
04.64	Applied RF _____ LF _____ RR _____ LR _____.
04.65	Released RF _____ LF _____ RR _____ LR _____.
04.66	Stroke Length RF _____ LF _____ RR _____ LR _____.
04.70	Clean differential breather, check for fluid leaks
04.80	Undercarriage inspection.
04.82	Soap Air Bags and Check For Leaks
04.90	Tie rods and ends.
05.10	Check ball joints-upper & lower -check front wheel bearing adjustment.
05.20	Check steering gear and linkage.
05.30	Check wheel seals.
05.60	Check drive line and u-joints & center support bearing.
05.70	Check shocks and bushings.
05.80	Check engine and transmission mounts; cradle supports.
05.90	Lube chassis.
06.00	Replace fuel filters.
06.05	Check air cleaner filter minder & reset.
06.10	Replace Air Cleaner
06.20	Check ground straps, battery cables, terminals, and starter connections.
06.30	Clean battery tops and terminals if needed-Check water level- Load test batteries.
06.32	Clean battery compartment. Load test both batteries.
06.34	1) _____ 2) _____
06.40	Clean or replace heater filter on rear heater-A/C.
06.90	Check fuel, oil, coolant, air, transmission, & PS lines in engine compartment.

**SALEM AREA MASS TRANSIT DISTRICT**  
**Inspection Checklist Items**

Inspection Id: KR34  
Type: C

Item Number	Description
07.00	Adjust Valves
07.01	Replace crank case breather filter-BUS 358 & 359 ONLY
07.10	Check coolant protection level (-25 to -40); check Nalcool with test strip (minimum = 10)
07.21	Replace Hyd filter
07.40	Check all side compartment door latches, clean and lube.
07.45	Rotate or flip rear Tires from side to side if needed. Fronts if side walls are bad.
07.49	Check front wheel oil level-check bearings if oil is discolored
07.50	Wheel stud nuts - check for proper torque. Lbs
07.51	If equipped; Remove hard drive.View hard drive for about 2 min, to make sure all cameras and sound are working normal. CHECK DATE, Time & bus number.
07.53	Lube W/C & rear exit door key locks with dry lube
07.60	Check W/C operation
07.70	Lube W/C Pivot points & check fastners.
07.72	Remove pump module cover & inspect hoses, fittings, connections,cables, fuses & relays
07.75	Inspect micro switches for security & adjustment
07.80	Check inner barrier operation.
07.81	Check outer barrier operation.
07.82	Check Threshold Warning Plate Alarm
07.83	Check cigarette lighter port and power port for power if equipped.
07.87	Check file for driver defect sheets.
07.90	Take for a SHORT test drive & check for leaks and fluid levels.

# Cherriots – Regional Inspections

## D Service

### SALEM AREA MASS TRANSIT DISTRICT Inspection Checklist Items

Inspection Id: KR34  
Type: D

Item Number	Description
01.00	Date _____ Mileage _____ WO# _____ IND# _____
01.05	Install protective seat cover on drivers seat
01.20	Brake and accelerator pedal action and feel, pump down air system.
01.22	Check throttle pedal spring on electronic control pedal.
01.30	Warning buzzer, horn, tell tale lamps, drivers' controls, and gauges
01.32	Check route sign operation if equipped.
01.40	Parking Brake operation - holds without movement, idle to 1200 rpm max
01.50	Check brake and accelerator interlock.
01.60	Check tilt steering wheel adjustment and telescope.
01.80	Check turn signals.
01.90	Check door operation - sensitive edges.
02.10	Check wheelchair tie-down straps, seat belts, and fold-up seats.
02.20	Check interior and exterior for damage, missing parts, decals, seats, stanchions, vents, panels, and locks.
02.30	Check window operations including emergency features.
02.40	Check all interior and exterior lights.
02.50	Check back-up lights and horn.
02.60	Check drivers mirror mounting and adjustment.
02.70	Check windshield wipers and washers. Rinse windshield - do not allow soap to dry.
02.71	Check engine belts-Fan -A/C -Alt etc.
02.73	Check Brake Fluid Level
02.77	Check power steering fluid level.
02.80	Fill windshield washer reservoir.
02.85	Bike rack - lube latch, hinges, and check all for proper operation
02.87	* Allow air compressor to build to 130lbs., cut off pressure, shut off engine.
02.88	Loss of air pressure in one minute, brake and accelerator applied. Record Loss _____
03.30	Steam clean engine, transmission & radiator, before inspection and road test.
03.31	REMOVE SIDE DOOR & CLEAN RADIATOR AS IF TOMORROW WILL BE 100 DEGREES
03.40	Road test - check engine performance, steering, suspension noise, transmission, and shift points.
03.41	1st ___ mph 2nd ___ mph 3rd ___ mph 4th ___
03.51	Decel test Service brakes _____ % _____ foot from 20 mph
03.60	Check Transmission Fluid Level.
03.80	Change oil and filter, take sample at operating temperature. Torque plug, Use ECO Oil 15/40 oil
03.85	Replace Trans Filters & ATF-use Mercon V- in the over head reels

**SALEM AREA MASS TRANSIT DISTRICT**  
**Inspection Checklist Items**

Inspection Id: KR34  
Type: D

Item Number	Description
03.90	Change differential fluid -use ? Fluid
03.91	Clean differential breather, check for fluid leaks
04.00	Change Anti-Freeze
04.10	Check fuel, oil, water, air, trans. & PS lines under bus for rubbing, kinks, frays & leaks
04.20	Check exhaust system.
04.30	Brake Linings - check wear for wear.
04.31	RF _____ LF _____ RR _____ LR _____
04.50	Record tire air pressure. Fronts psi- Rears psi --cold
04.51	LF _____ RF _____ LRI _____ LRO _____ RRI _____ RRO _____
04.60	Record tire tread depth - Minimum of 6/32" on Fronts & 4/32 Rears
04.61	LF _____ RF _____ LRI _____ LRO _____ RRI _____ RRO _____
04.63	Check brake stroke measurement with 90 to 100 PSI --- Fronts 1 3/4" Rears 2".
04.64	Applied RF _____ LF _____ RR _____ LR _____.
04.65	Released RF _____ LF _____ RR _____ LR _____.
04.66	Stroke Length RF _____ LF _____ RR _____ LR _____.
04.80	Undercarriage inspection.
04.82	Soap Air Bags and Check For Leaks
04.90	Tie rods and ends.
05.10	Check King pins & check front wheel bearing adjustment.
05.20	Check steering gear and linkage.
05.30	Check wheel seals.
05.60	Check drive line and u-joints & center support bearing.
05.70	Check shocks and bushings.
05.80	Check engine and transmission mounts; cradle supports.
05.90	Lube chassis.
06.00	Replace fuel filters.
06.05	Check air cleaner filter minder & reset.
06.10	Replace Air Cleaner
06.20	Check ground straps, battery cables, terminals, and starter connections.
06.30	Clean battery tops and terminals if needed-Check water level- Load test batteries.
06.32	Clean battery compartment. Load test both batteries.
06.34	1) _____ 2) _____

**SALEM AREA MASS TRANSIT DISTRICT**  
**Inspection Checklist Items**

Inspection Id: KR34  
Type: D

Item Number	Description
06.40	Clean or replace heater filter on rear heater-A/C.
06.90	Check fuel, oil, coolant, air, transmission, & PS lines in engine compartment.
07.00	Adjust valves
07.01	Replace crank case breather filter-BUS 358 & 359 ONLY
07.10	Check coolant protection level (-25 to -40); check Nalcool with test strip (minimum = 10)
07.12	Replace DPF filter-BUS 358 & 359 ONLY
07.20	Change Hyd oil
07.21	Replace Hyd filter
07.40	Check all side compartment door latches, clean and lube.
07.42	Drain front hubs & refill with 85/140 oil-check bearings if oil is discolored
07.45	Rotate or flip rear Tires from side to side if needed. Fronts if side walls are bad.
07.50	Wheel stud nuts - check for proper torque. Lbs
07.51	If equipped; Remove hard drive.View hard drive for about 2 min, to make sure all cameras and sound are working normal. CHECK DATE, Time & bus number.
07.53	Lube W/C & rear exit door key locks with dry lube
07.60	Check W/C operation
07.70	Lube W/C Pivot points & check fastners.
07.72	Remove pump module cover & inspect hoses, fittings, connections,cables, fuses & relays
07.73	Check fluid level-change if fluid looks contaminated
07.75	Inspect micro switches for security & adjustment
07.80	Check inner barrier operation.
07.81	Check outer barrier operation.
07.82	Check Threshold Warning Plate Alarm
07.83	Check cigarette lighter port and power port for power if equipped.
07.85	Check Toe In
07.87	Check file for driver defect sheets.
07.90	Take for a SHORT test drive & check for leaks and fluid levels. After PM defects are completed.



# Cherriots – Shop and Ride Inspections

## A Service

### SALEM AREA MASS TRANSIT DISTRICT Inspection Checklist Items

Inspection Id: RDL  
Type: A

Item Number	Description
01.00	Date _____ Mileage _____ WO# _____ IND# _____
01.05	Install protective seat cover on drivers seat
01.20	Check brake and accelerator pedal action and feel.
01.30	Check horn, tell tale lamps, driver's controls, and gauges.
01.40	Check parking brake operation -- holds on a slope.
01.50	Check brake and accelerator interlock.
01.60	Check tilt steering wheel adjustment and telescope.
01.80	Check turn signals.
01.90	Check door operation - sensitive edges.
02.10	Check wheelchair tie-down straps, seat belts, and fold-up seats.
02.20	Check interior and exterior for damage, missing parts, decals, seats, stanchions, vents, panels, and locks.
02.30	Check window operations including emergency features.
02.40	Check all interior and exterior lights.
02.50	Check back-up lights and horn.
02.60	Check drivers mirror mounting and adjustment.
02.70	Check windshield wipers and washers. Rinse windshield - do not allow soap to dry.
02.71	Check engine belts-Fan -A/C -Alt etc.
02.73	Check Brake Fluid Level
02.77	Check power steering fluid level.
02.80	Fill windshield washer reservoir.
03.30	Steam clean engine, transmission & radiator, before inspection and road test.
03.40	Road test - check engine performance, steering, suspension noise, transmission, and shift points.
03.41	1st ____ mph 2nd ____ mph 3rd ____ mph 4th ____
03.51	Decel test Service brakes _____ % _____ foot from 20 mph
03.60	Check Transmission Fluid Level.
03.81	Change oil and filter, take sample at operating temperature. Torque plug , 5w30 oil. 7QT FORD-6QT CHEVY
04.10	Check fuel, oil, water, air, trans. & PS lines under bus for rubbing, kinks, frays & leaks
04.20	Check exhaust system.
04.30	Brake Linings - check wear for wear.6MM OK-5MM or less brakes Due.
04.31	RF _____ LF _____ RR _____ LR _____
04.50	Record tire air pressure. Fronts 80 psi- Rears 80 psi --cold
04.51	LF _____ RF _____ LRI _____ LRO _____ RRI _____ RRO _____

**SALEM AREA MASS TRANSIT DISTRICT  
Inspection Checklist Items**

Inspection Id: RDL  
Type: A

Item Number	Description
04.60	Record tire tread depth - Minimum of 6/32" on Fronts & 4/32" REARS
04.61	LF _____ RF _____ LRI _____ LRO _____ RRI _____ RRO _____
04.70	Clean differential breather, check for fluid leaks
04.80	Undercarriage inspection.
04.90	Tie rods and ends.
05.10	Check ball joints-upper & lower -check front wheel bearing adjustment.
05.20	Check steering gear and linkage.
05.30	Check wheel seals.
05.60	Check drive line and u-joints & center support bearing.
05.70	Check shocks and bushings.
05.80	Check engine and transmission mounts; cradle supports.
05.90	Lube chassis.
06.20	Check ground straps, battery cables, terminals, and starter connections.
06.30	Clean battery tops and terminals if needed-Check water level-
06.32	Clean battery compartment. Load test both batteries.
06.34	1) _____ 2) _____
06.40	Clean or replace heater filter on rear heater-A/C.
06.90	Check fuel, oil, coolant, air, transmission, & PS lines in engine compartment.
07.40	Check all side compartment door latches, clean and lube.
07.50	Wheel stud nuts - check for proper torque.150-165lbs
07.51	If equipped; Remove hard drive.View hard drive for about 2 min, to make sure all cameras and sound are working normal. CHECK DATE, Time & bus number.
07.53	Lube W/C & rear exit door key locks with dry lube
07.60	Check W/C lift operation
07.70	Lube W/C Pivot points & check fastners.
07.80	Check inner barrier operation.
07.81	Check outer barrier operation.
07.82	Check Threshold Warning Plate Alarm
07.83	Check cigarette lighter port and power port for power if equipped.
07.87	Check file for driver defect sheets.
07.88	Reset oil change light if equipped with.
07.90	Take for a SHORT test drive & check for leaks and fluid level after defects are completed.

# Cherriots – Shop and Ride Inspections

## B Service

### SALEM AREA MASS TRANSIT DISTRICT Inspection Checklist Items

Inspection Id: RDL

Type: B

Item Number	Description
01.00	Date _____ Mileage _____ WO# _____ IND# _____
01.05	Install protective seat cover on drivers seat
01.20	Check brake and accelerator pedal action and feel,
01.30	Check horn, tell tale lamps, driver's controls, and gauges.
01.40	Check parking brake operation -- holds on a slope.
01.50	Check brake and accelerator interlock.
01.60	Check tilt steering wheel adjustment and telescope.
01.80	Check turn signals.
01.90	Check door operation - sensitive edges.
02.10	Check wheelchair tie-down straps, seat belts, and fold-up seats.
02.20	Check interior and exterior for damage, missing parts, decals, seats, stanchions, vents, panels, and locks.
02.30	Check window operations including emergency features.
02.40	Check all interior and exterior lights.
02.50	Check back-up lights and horn.
02.60	Check drivers mirror mounting and adjustment.
02.70	Check windshield wipers and washers. Rinse windshield - do not allow soap to dry.
02.71	Check engine belts - Fan - A/C - Alt etc.
02.73	Check Brake Fluid Level
02.77	Check power steering fluid level.
02.80	Fill windshield washer reservoir.
03.30	Steam clean engine, transmission & radiator, before inspection and road test.
03.40	Road test - check engine performance, steering, suspension noise, transmission, and shift points.
03.41	1st ___ mph 2nd ___ mph 3rd ___ mph 4th ___
03.51	Decel test Service brakes _____ % _____ foot from 20 mph
03.60	Check Transmission Fluid Level.
03.81	Change oil and filter, take sample at operating temperature. Torque plug , 5w30 oil. 7QT FORD-6QT CHEVY
04.10	Check fuel, oil, water, air, trans. & PS lines under bus for rubbing, kinks, frays & leaks
04.20	Check exhaust system.
04.30	Brake Linings - check wear for wear.6MM OK-5MM or less brakes Due.
04.31	RF _____ LF _____ RR _____ LR _____
04.50	Record tire air pressure. Fronts 80 psi- Rears 80 psi --cold
04.51	LF _____ RF _____ LRI _____ LRO _____ RRI _____ RRO _____

**SALEM AREA MASS TRANSIT DISTRICT  
Inspection Checklist Items**

Inspection Id: RDL  
Type: B

Item Number	Description
04.60	Record tire tread depth - Minimum of 6/32" on Fronts & 4/32" Rears
04.61	LF _____ RF _____ LRI _____ LRO _____ RRI _____ RRO _____
04.70	Clean differential breather, check for fluid leaks
04.80	Undercarriage inspection.
04.90	Tie rods and ends.
05.10	Check ball joints-upper & lower -check front wheel bearing adjustment.
05.20	Check steering gear and linkage.
05.30	Check wheel seals.
05.60	Check drive line and u-joints & center support bearing.
05.70	Check shocks and bushings.
05.80	Check engine and transmission mounts; cradle supports.
05.90	Lube chassis.
06.00	Replace fuel filter --DIESEL ONLY
06.20	Check ground straps, battery cables, terminals, and starter connections.
06.30	Clean battery tops and terminals if needed-Check water level- Load test batteries.
06.32	Clean battery compartment. Load test both batteries.
06.34	1) _____ 2) _____
06.40	Clean or replace heater filter on rear heater-A/C.
06.90	Check fuel, oil, coolant, air, transmission, & PS lines in engine compartment.
07.10	Check coolant protection level (-25 to -40)
07.40	Check all side compartment door latches, clean and lube.
07.45	Rotate or flip rear Tires from side to side if needed. Fronts if side walls are bad.
07.50	Wheel stud nuts - check for proper torque. 150-165lbs
07.51	If equipped; Remove hard drive.View hard drive for about 2 min, to make sure all cameras and sound are working normal. CHECK DATE, Time & bus number.
07.53	Lube W/C & rear exit door key locks with dry lube
07.60	Check W/C operation
07.70	Lube W/C Pivot points & check fasteners
07.80	Check inner barrier operation.
07.81	Check outer barrier operation
07.82	Check Thershold warning plate.
07.83	Check cigarette lighter port and power port for power if equipped.
07.87	Check file for driver defect sheets.

**SALEM AREA MASS TRANSIT DISTRICT**  
**Inspection Checklist Items**

Inspection Id: RDL  
Type: B

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Item Number	Description
07.88	Reset oil change light if equipped with.
07.90	Take for a SHORT test drive & check for leaks and fluid levels. After PM defects are completed.

# Cherriots – Shop and Ride Inspections

## C Service

### SALEM AREA MASS TRANSIT DISTRICT Inspection Checklist Items

Inspection Id: RDL  
Type: C

Item Number	Description
01.00	Date _____ Mileage _____ WO# _____ IND# _____
01.05	Install protective seat cover on drivers seat
01.20	Check brake and accelerator pedal action and feel,
01.30	Check horn, tell tale lamps, driver's controls, and gauges.
01.40	Check parking brake operation -- holds on a slope.
01.50	Check brake and accelerator interlock.
01.60	Check tilt steering wheel adjustment and telescope.
01.80	Check turn signals.
01.90	Check door operation - sensitive edges.
02.10	Check wheelchair tie-down straps, seat belts, and fold-up seats.
02.20	Check interior and exterior for damage, missing parts, decals, seats, stanchions, vents, panels, and locks.
02.30	Check window operations including emergency features.
02.40	Check all interior and exterior lights.
02.50	Check back-up lights and horn.
02.60	Check drivers mirror mounting and adjustment.
02.70	Check windshield wipers and washers. Rinse windshield - do not allow soap to dry.
02.71	Check engine belts-Fan -A/C -Alt etc.
02.73	Check Brake Fluid Level
02.77	Check power steering fluid level.
02.80	Fill windshield washer reservoir.
03.30	Steam clean engine, transmission & radiator, before inspection and road test.
03.40	Road test - check engine performance, steering, suspension noise, transmission, and shift points.
03.41	1st _____ mph 2nd _____ mph 3rd _____ mph 4th _____
03.51	Decel test Service brakes _____ % _____ foot from 20 mph
03.60	Check Transmission Fluid Level.
03.81	Change oil and filter, take sample at operating temperature. Torque plug , 5w30 oil. 7QT FORD-6QT CHEVY
03.85	Replace Trans pick up filter- change ATF- Fill with 9qts Mercon LV
04.10	Check fuel, oil, water, air, trans. & PS lines under bus for rubbing, kinks, frays & leaks
04.20	Check exhaust system.
04.30	Brake Linings - check wear for wear.6MM OK-5MM or less brakes Due.
04.31	RF _____ LF _____ RR _____ LR _____
04.50	Record tire air pressure. Fronts 80 psi- Rears 80 psi --cold

**SALEM AREA MASS TRANSIT DISTRICT  
Inspection Checklist Items**

Inspection Id: RDL  
Type: C

Item Number	Description
04.51	LF _____ RF _____ LRI _____ LRO _____ RRI _____ RRO _____
04.60	Record tire tread depth - Minimum of 6/32" on Fronts & 4/32 Rears
04.61	LF _____ RF _____ LRI _____ LRO _____ RRI _____ RRO _____
04.70	Clean differential breather, check for fluid leaks
04.80	Undercarriage inspection.
04.90	Tie rods and ends.
05.10	Check ball joints-upper & lower -check front wheel bearing adjustment.
05.20	Check steering gear and linkage.
05.30	Check wheel seals.
05.60	Check drive line and u-joints & center support bearing.
05.70	Check shocks and bushings.
05.80	Check engine and transmission mounts; cradle supports.
05.90	Lube chassis.
06.00	Replace fuel filter-DIESEL & GASOLINE
06.10	Replace air cleaner
06.20	Check ground straps, battery cables, terminals, and starter connections.
06.30	Clean battery tops and terminals if needed-Check water level- Load test batteries.
06.32	Clean battery compartment. Load test both batteries.
06.34	1) _____ 2) _____
06.40	Clean or replace heater filter on rear heater-A/C.
06.90	Check fuel, oil, coolant, air, transmission, & PS lines in engine compartment.
07.10	Check coolant protection level (-25 to -40)
07.40	Check all side compartment door latches, clean and lube.
07.45	Rotate or flip rear Tires from side to side if needed. Fronts if side walls are bad.
07.50	Rotate rear Tires from side to side if needed. Fronts if side walls are bad.
07.52	If equipped; Remove hard drive.View hard drive for about 2 min, to make sure all cameras and sound are working normal. CHECK DATE, Time & bus number.
07.53	Lube W/C & rear exit door key locks with dry lube
07.60	Check W/C operation
07.70	Lube W/C Pivot points & check fastners.
07.72	Remove pump module cover & inspect hoses, fittings, connections,cables, fuses & relays
07.75	Inspect micro switches for security & adjustment
07.80	Check inner barrier operation.

**SALEM AREA MASS TRANSIT DISTRICT**  
**Inspection Checklist Items**

Inspection Id: RDL  
Type: C

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Item Number	Description
07.81	Check outer barrier operation.
07.82	Check Threshold Warning Plate Alarm
07.83	Check cigarette lighter port and power port for power if equipped.
07.87	Check file for drivers defects
07.88	Reset oil change light if equipped with.
07.90	Take for a SHORT test drive & check for leaks and fluid levels.

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# Cherriots – Shop and Ride Inspections

## D Service

### SALEM AREA MASS TRANSIT DISTRICT Inspection Checklist Items

Inspection Id: RDL  
Type: D

Item Number	Description
	- Date _____ Mileage _____ WO# _____ IND# _____
01.05	Install protective seat cover on drivers seat
01.20	Check brake and accelerator pedal action and feel,
01.30	Check horn, tell tale lamps, driver's controls, and gauges.
01.40	Check parking brake operation -- holds on a slope.
01.50	Check brake and accelerator interlock.
01.60	Check tilt steering wheel adjustment and telescope.
01.80	Check turn signals.
01.90	Check door operation - sensitive edges.
02.10	Check wheelchair tie-down straps, seat belts, and fold-up seats.
02.20	Check interior and exterior for damage, missing parts, decals, seats, stanchions, vents, panels, and locks.
02.30	Check window operations including emergency features.
02.40	Check all interior and exterior lights.
02.50	Check back-up lights and horn.
02.60	Check drivers mirror mounting and adjustment.
02.70	Check windshield wipers and washers. Rinse windshield - do not allow soap to dry.
02.71	Check engine belts-Fan -A/C -Alt etc.
02.73	Check Brake Fluid Level
02.77	Check power steering fluid level.
02.80	Fill windshield washer reservoir.
03.30	Steam clean engine, transmission & radiator, before inspection and road test.
03.40	Road test - check engine performance, steering, suspension noise, transmission, and shift points.
03.41	1st ____ mph 2nd ____ mph 3rd ____ mph 4th ____
03.51	Decel test Service brakes _____ % _____ foot from 20 mph
03.60	Check Transmission Fluid Level.
03.81	Change oil and filter, take sample at operating temperature. Torque plug , 5w30 oil. 7QT FORD-6QT CHEVY
03.85	Replace Trans pick up filter- change ATF- Fill with 9qts Mercon LV
03.90	Change differential fluid -use 75W-90W fluid 5gallon can
03.91	Clean differential breather, check for fluid leaks
04.00	Change Anti-Freeze
04.10	Check fuel, oil, water, air, trans. & PS lines under bus for rubbing, kinks, frays & leaks
04.20	Check exhaust system.

**SALEM AREA MASS TRANSIT DISTRICT  
Inspection Checklist Items**

Inspection Id: RDL  
Type: D

Item Number	Description
04.30	Brake Linings - check wear for wear.6MM OK-5MM or less brakes Due.
04.31	RF _____ LF _____ RR _____ LR _____
04.50	Record tire air pressure. Fronts 80 psi- Rears 80 psi --cold
04.51	LF _____ RF _____ LRI _____ LRO _____ RRI _____ RRO _____
04.60	Record tire tread depth - Minimum of 6/32" on Fronts & 4/32 Rears
04.61	LF _____ RF _____ LRI _____ LRO _____ RRI _____ RRO _____
04.80	Undercarriage inspection.
04.90	Tie rods and ends.
05.10	Check ball joints-upper & lower -check front wheel bearing adjustment.
05.20	Check steering gear and linkage.
05.30	Check wheel seals.
05.60	Check drive line and u-joints & center support bearing.
05.70	Check shocks and bushings.
05.80	Check engine and transmission mounts; cradle supports.
05.90	Lube chassis.
06.00	Replace fuel filter DIESEL & GASOLINE
06.10	Replace Air cleaner
06.20	Check ground straps, battery cables, terminals, and starter connections.
06.30	Clean battery tops and terminals if needed-Check water level- Load test batteries.
06.32	Clean battery compartment. Load test both batteries.
06.34	1) _____ 2) _____
06.40	Clean or replace heater filter on rear heater-A/C.
06.90	Check fuel, oil, coolant, air, transmission, & PS lines in engine compartment.
07.10	Check coolant protection level (-25 to -40)
07.40	Check all side compartment door latches, clean and lube.
07.42	Repack front wheel bearings
07.43	Rotate or flip rear Tires from side to side if needed. Fronts if side walls are bad.
07.44	Replace PCV valve- if equipped
07.45	Replace Spark Plugs-if equipped
07.50	Wheel stud nuts - check for proper torque.150-165lbs
07.52	If equipped; Remove hard drive.View hard drive for about 2 min, to make sure all cameras and sound are working normal. CHECK DATE, Time & bus number. .
07.53	Lube W/C & rear exit door key locks with dry lube

**SALEM AREA MASS TRANSIT DISTRICT**  
**Inspection Checklist Items**

Inspection Id: RDL  
Type: D

Item Number	Description
07.60	Check W/C LIFToperation
07.70	Lube W/C Pivot points & check fastners.
07.72	Remove pump module cover & inspect hoses, fittings, connections,cables, fuses & relays
07.73	Check fluid level-change if fluid looks contaminated.
07.75	Inspect micro switches for security & adjustment
07.80	Check outer barrier operation.
07.81	Check inner barrier operation.
07.82	Check Threshold Warning Plate Alarm
07.83	Check cigarette lighter port and power port for power if equipped.
07.85	Check Toe In
07.87	Check file for drivers defects
07.88	Reset oil change light if equipped with.
07.90	Take for a SHORT test drive & check for leaks and fluid levels.

# APPENDIX B

## Daily Vehicle Inspection Report



### Daily Vehicle Inspection Report

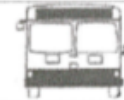
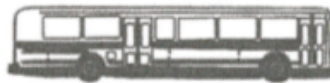
Vehicle No. \_\_\_\_\_

Date: \_\_\_\_\_

Operator's Name (Please Print)	RT / Run #	RT / Run #	RT / Run #	RT / Run #	RT / Run #	RT / Run #
1. _____						
2. _____						
3. _____						
4. _____						

1	2	3	4	Inspection Item	1	2	3	4	Inspection Item
				Headlights operational - High & Low beam					Triangle reflectors - red tie present
				Turn signals complete and operational					Seatbelt cutter present
				Emergency 4-way flashers operational					Check fire system says "OK"
				Clearance lights operational & reflectors present					Check camera system for "system ok".
				Mirrors are complete & in good condition					2-way radio is operational (key up mic)
				Bike rack is operational					Windshield wipers operational
				Windshields have no cracks/chips					Horn operational
				Route signs are operational before departing					Doors operational
				Tire Condition					Kneeling System operational
				Lug nuts tight, no rust or damage					W/C Ramp operating properly
				Coolant level (Orion 7 only)					Steering wheel secure, no excessive play
				Check under engine for leaks					List low air warning (by 60psi) _____
				Brake lights are complete and operational					Applied brake loss (no more than 3 psi in 60 sec)
				operational					Air compressor cut in (min 85 psi) _____
				Fuel cap secured (Except CNG)					Air compressor cut out (max 130 psi) _____
				Seats and cushions are secure, no vandalism					Parking brake complete and operating properly
				Tie-downs operational - # of tie-downs: _____					Brake pedal feels good and stopping properly
				Windows & panels secure before departing					Brake/throttle interlock operational
				First aid kit zip tie intact					Log on to farebox, check operation
				Fire extinguisher present and fully charged					Shut all windows and vents once returned to the facility.

Passing items indicate with a "V", failed items denote with an "X". Please explain in detail below any defect found with the vehicle or when a problem occurs prior to leaving the yard. Circle the diagrams below with any existing damage.



\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

I declare that I have properly performed a vehicle inspection on the vehicle indicated above and have inspected and marked the inspection items listed above accordingly.

Operator 1 Signature: \_\_\_\_\_

Operator 2 Signature: \_\_\_\_\_

Operator 3 Signature: \_\_\_\_\_

Operator 4 Signature: \_\_\_\_\_

- |  |                               |
|--|-------------------------------|
| <input type="checkbox"/> Reviewed                    | Technician's Signature: _____ |
| <input type="checkbox"/> Noted for Repair            |                               |
| <input type="checkbox"/> Could not duplicate problem | Maint. Sup. Signature: _____  |
| <input type="checkbox"/> Repaired                    |                               |

Comments:

Inspection of your vehicle is required by federal law and must be performed before moving the vehicle.

## APPENDIX C

### Transit Asset Management Targets

SAMTD TRANSIT ASSET MANAGEMENT									01/31/17
#	Reporting Category	Asset Inventory	Detail	Type	FTA Requirement (ULB)	CPC (ULB)	Performance Measure	SAMTD Current Performance	TAM Targets
1	Rolling Stock/ Urban	Fixed Route Bus (BU)	35 ft.	Diesel	12 yrs or 500K miles	15 yrs	Percent met or exceeded ULB	0%	0% of fleet above CPC ULB
1	Rolling Stock/ Urban	Fixed Route Bus (BU)	40 ft.	Diesel	12 yrs or 500K miles	15 yrs	Percent met or exceeded ULB	0%	0% of fleet above CPC ULB
1	Rolling Stock/ Urban	Fixed Route Bus (BU)	35 ft.	CNG	12 yrs or 500K miles	15 yrs	Percent met or exceeded ULB	100%	0% of fleet above CPC ULB
1	Rolling Stock/ Urban	Fixed Route Bus (BU)	40 ft.	CNG	12 yrs or 500K miles	15 yrs	Percent met or exceeded ULB	55%	0% of fleet above CPC ULB
1	Rolling Stock/ Rural	Fixed Route Bus (BU)	32 ft.	Diesel/hybrid	10 yrs or 350K miles	12 yrs	Percent met or exceeded ULB	13%	0% of fleet above CPC ULB
1	Rolling Stock/ Rural	Fixed Route Bus (BU)	33 ft.	Diesel	10 yrs or 350K miles	12 yrs	Percent met or exceeded ULB	13%	0% of fleet above CPC ULB
1	Rolling Stock/ Urban	Paratransit Service (CU)	22-24 ft.	Gas	5 yrs or 150K miles	8 yrs	Percent met or exceeded ULB	33%	0% of fleet above CPC ULB
1	Rolling Stock/ Urban	Paratransit Service (VN)	15 ft.	Gas	5 yrs or 150K miles	8 yrs	Percent met or exceeded ULB	0%	0% of fleet above CPC ULB
2	Equipment	Non-Revenue Service Vehicle	Utility Non-Revenue Service	Maintenance Pickups	8 yrs.	10 yrs. or 150,000 miles	Percent met or exceeded ULB	17%	0% of fleet above CPC ULB
2	Equipment	Non-Revenue Service Vehicle	Staff Non-Revenue Vehicles	Supervisor vehicles and pool cars	8 yrs.	8-10 yrs. or 150,000 miles	Percent met or exceeded ULB	8%	0% of fleet above CPC ULB
3	Facilities	Maintenance Operations Facilities	All systems and components	SAMTD-Owned Facilities	NA	Defined by FTA	% rated below 3 on the TERM scale	100%	100% at 3.0 or above on TERM scale
3	Facilities	Administration Facilities	All systems and components	SAMTD-Owned Facilities	NA	Defined by FTA	% rated below 3 on the TERM scale	100%	100% at 3.0 or above on TERM scale
3	Facilities	Keizer Transit Center/ Layover	All systems and components	SAMTD-Owned Facilities	NA	Defined by FTA	% rated below 3 on the TERM scale	100%	100% at 3.0 or above on TERM scale
3	Facilities	Downtown Transit Center/ Layover	All systems and components	SAMTD-Owned Facilities	NA	Defined by FTA	% rated below 3 on the TERM scale	100%	100% at 3.0 or above on TERM scale

\*Useful life benchmark detail

\*\*FTA Transit Economic Requirements Model Benchmark - Ratings below 3.0 for conditions

Equipment Benchmark - Age

Rolling Stock Benchmark - Age

Facilities Benchmark - Condition

Infrastructure Benchmark - Performance





# **Mobility Management Work Plan**

**7/1/2019-6/30/2021**

Highlight of changes from prior year:

Based on FY 19 evaluation analysis, additional performance measures were added as well as deleted

Reporting: Progress on goals will be reported on quarterly. An annual report will detail outcome achievements and a detailed analysis of the performance measures per quarter.

## Cherriots Mission Statement for Mobility Management:

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

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

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

### Promote Accessibility and Liveability:

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

The performance measures we have identified will show progress towards the goal of promoting accessibility and liveability are: the number of people successfully travel trained/number of travel trainings provided; the total number of trip planning interactions from the outreach specialist and the Customer Service Representatives as well as the total number



of website trip planner hits; the number of outreach opportunities attended; and the number of individual contacts made resulting from outreach opportunities attended.

Goal:	Objectives:	Outcomes:	Who:	Performance Measure:
<b>Promote accessibility and liveability</b>	Provide custom trip planning for individuals to enable use of the fixed route services	Customer Service provides custom trip planning for better responsiveness and improved customer service.  _____ Website Trip Planning	outreach specialist  Customer Service Representative (CSR)  _____ Marketing Department	# of trip planning interactions (% customer service calls, number of travel training trip planning interactions)  # of individual travel trainings provided/completed  _____ website and Transit App trip planner hits (from Marketing)
<b>Promote accessibility and liveability</b>	Promote transportation services that are accessible, lead to livable communities and improve quality of life	Greater mobility for seniors, individuals with disabilities, and all other populations; access to jobs, essential shopping, and recreational activities are provided	mobility coordinator	# of Outreach event reports  # of individual contacts  Reduced fare ridership # on fixed routes

Focus on the Individual:

Focusing on the individual was determined to be a priority for Cherriots because providing transportation services to ALL is a priority rather than just the majority of the population. Not all people can access one type of transportation option therefore Cherriots commits to offering a variety of transportation options so that everyone within the community has the ability to travel. In addition to providing transportation options for everyone within the community, Cherriots believes that providing excellent customer service supports the goal of focusing on the individual. Transit Hosts are a wonderful program where the individual is focused on which is a program that offers individualized services. The Transit Host is available to assist riders from one bus to another on the transit center as well as answer questions.

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

Goal:	Objectives:	Outcomes:	Who:	Performance Measure:
<b>Focus on the Individual</b>	Provide and promote transportation services which are specific to individual's needs	Passengers are assisted in trip planning, information about fixed route service and assisted to correct route at the transit mall	Transit host CS Manager	Daily data collected of transit host interactions (CS Manager)
<b>Focus on the Individual</b>	Increase RED Line utilization as a transportation option	Increase Shop and Ride Dial-a-Ride ridership for seniors	Call Center CSR	# of trips provided by monthly report (Melissa's report)

<b>Focus on the Individual</b>		and people with disabilities with preference for medical appointments	Customer Service CSR	# of Shop and Ride denials due to rightsizing the service to fit within the grant budget
	Focus on the quality of customer service	Better/more availability of information available to potential customers	Mobility Coordinator	
			Transit Hosts	# of transit host interactions per quarter (Ron's report)
			Mobility coordinator	# of drafted, customized, and/or revised presentations and literature for current and prospective riders- example PowerPoints, informational material, literature, flyers, ride guides, posters, collateral, etc.

Improve Coordination:

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

The performance measures that we have identified that show progress towards the goal of improving coordination are: the number of partnered community events; and the number of external coordination and partnership meetings/opportunities attended.

Goal:	Objectives:	Outcomes:	Who:	Performance Measure:
<b>Improve Coordination</b>	Establish partnerships to coordinate transportation services; programs, and projects	Increase coordination by reaching out to community partners which will promote coordination of transportation services	mobility coordinator	# of partnered community events
<b>Improve Coordination</b>	Improve services coordination	Increase coordination by reaching out to community partners which will promote coordination of transportation services	Mobility Coordinator	# of service coordination and partnership opportunities ie: SIT Meetings, STF Meetings, Outreach Meetings, etc.

Foster Education and Awareness:

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

The performance measures that we have identified that show progress towards the goal of fostering education and awareness are: the outreach event report on the number of individual contacts made; # of community meetings attended; the number of presentations provided to agencies within the community; the number of website hits; and the number of printed materials ordered and distributed.

Goal:	Objectives:	Outcomes:	Who:	Performance Measure:
<p><b>Foster Education and Awareness</b></p>	<p>Provide educational opportunities by attending health and human services forums, community partner events, educational institution events. Work to promote and reinforce a positive outlook in individual’s attitudes and behavior toward public transportation options.</p>	<p>Inform and educate through outreach efforts to the Salem-Keizer community as well as surrounding rural communities,</p>	<p>mobility coordinator  CS Manager  Marketing,</p>	<p># of outreach event reports/ # of individual contacts <hr/># of community meetings attended <hr/># of presentations to agencies in the community</p>

<p><b>Foster Education and Awareness</b></p>		<p>we expect to demonstrate an increase of awareness of supportive services and programs</p>		
<p><b>Foster Education and Awareness</b></p>	<p>Provide printed/internet public information on transportation services and programs to bolster the community's awareness</p>	<p>Cherriots website, outreach events, and C.S.R.s provide information on transportation services and programs Printed materials available to identify transportation services and programs</p>	<p>Marketing department</p>	<p>website hits</p> <p># of printed materials ordered and distributed</p>

Reporting: Performance measures will be reported quarterly by the persons responsible. The report will include a project summary in addition to specific quantitative data.

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

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



## **PUBLIC NOTICE**

### **FUNDS AVAILABLE FOR TRANSPORTATION PROJECTS SERVING SENIORS AND INDIVIDUALS WITH DISABILITIES**

The Federal Transit Administration has announced the availability of federal fiscal year 2020 Section 5310 Formula funds (\$244,731). Salem Area Mass Transit District (SAMTD) is a designated recipient of 5310(FTA) funds for the Salem-Keizer urban area and is responsible for soliciting for projects on an annual basis. Section 5310 funds (5310(FTA)) can be used for public transportation projects serving seniors and individuals with disabilities within the Salem-Keizer urban growth boundary only. Matching local funds are required for this grant. The match ratio is dependent on the type of project proposed. Projects must be listed in the Cherriots "Coordinated Public Transit – Human Services Transportation Plan" dated September 2019. A link to this document can be found at [Cherriots.org/grants](http://Cherriots.org/grants), and a list of eligible projects can be found in the tables of Chapter 6, beginning on p. 5.

During two public meetings, a Technical Advisory Committee (TAC) will review and rank applications for 5310 dollars, and the Special Transportation Fund Advisory Committee (STFAC) will review grant proposals and make a project priority ranking recommendation to the SAMTD Board. There will be time for public testimony at the TAC and STFAC meetings. Full details of the process including applications, instructions, and dates/times of the public meetings will be available at [Cherriots.org/grants](http://Cherriots.org/grants) beginning April 10, 2020.

Please refer to the corresponding grant application instructions for all of the eligibility requirements for organizations and projects.

Virtual Training Session for new and returning applicants is scheduled on April 16, 2020 from 2:00 p.m. to 3:00 p.m. Participation is by phone or webcast only. There will be no in-

person gathering for this meeting. To register for the virtual training session for assistance with the application process for your projects or for more information, contact Jolene White, Email: [jolene.white@cherriots.org](mailto:jolene.white@cherriots.org) | Phone: 503-361-7521.

To submit an application, send it to: Attn: Jolene White, [jolene.white@cherriots.org](mailto:jolene.white@cherriots.org). Paper copies will not be accepted. Applications must be received by 5:00 p.m., June 19, 2020 to be considered.

Si desea una copia de este aviso público en español, por favor visite el sitio web a partir del 10 de abril de 2020 (<http://cherriots.org/grants>) o por teléfono: 503-588-2424.

## Section 531 0(FTA) Grants

Title 49 USC Section 531 0 authorizes the formula assistance program for the Enhanced Mobility of Seniors and Individuals with Disabilities Program and provides formula funds to designated recipients to improve mobility for seniors and individuals with disabilities.

SAMTD is a designated recipient of Section 531 0 funds (531 0(FTA)) for the Salem-Keizer urban area, and is responsible for soliciting for projects on an annual basis. 531 0(FTA) funds can be used for public transportation projects serving seniors and individuals with disabilities within the Salem-Keizer urban growth boundary only. The appropriation for Fiscal Year 2020 is \$244,731. Matching local funds are required for this grant. The match ratio is dependent on the type of project proposed. Projects must be listed in the [Cherriots "Coordinated Public Transit Human Services Transportation Plan" dated September 2019](#). Local matches must be provided from sources other than Federal Department of Transportation (DOT) funds. Farebox revenue may not be used as a local match. Farebox revenue is considered income and is deducted from total operating cost to determine the net cost of the activity.

The use of a non-cash local match is allowable and may include volunteer transportation program services and physical improvements.

SAMTD's 531 0 program requires that all projects selected for award address at least one need or strategy identified in the [Cherriots Coordinated Public Transportation - Human Services Transportation Plan \(The Coordinated Plan\) dated September 2019](#). A list of eligible projects can be found in the tables of Chapter 6, beginning on p. 54.

During two public meetings, a Technical Advisory Committee (TAC) will review and rank applications for 531 0 dollars, and the [Special Transportation Fund Advisory Committee \(STFAC\)](#) will review grant proposals and make a project priority ranking recommendation to the

**2019-2021 Special Transportation  
Fund (STF) Grant Application  
for Projects Located Within Marion and  
Polk Counties**



# 2019-2021 STF Grant Application for Projects Located Within Marion and Polk Counties

## INTRODUCTION

- Read the Cherrriots *2019-2021 STF Grant Application Instructions* prior to completing this application.
- Each project submitted for funding consideration must have its own application.
- DO NOT submit the application for subrecipients on the “Funding Opportunities” section of the ODOT RPTD website. Only submit this application to Salem Area Mass Transit District (SAMTD) following the instructions referenced above.
- Selection criteria are detailed in the *Application Instructions*.
- This form must be filled out using the online form and submitted in Adobe .pdf format. Paper applications will NOT be accepted.
- Signature pages should be scanned and attached as separate pages to each application.

## Submittal Checklist

### *Make sure*

- ✓ Application is complete, signed, and dated

### *Submit*

- ✓ Proof of agency status (template included in application packet)
- ✓ Maintenance Plan (if submitting an application for preventive maintenance)

## A. ORGANIZATION INFORMATION

**Name of Organization:**

**Employer Identification Number (EIN):**

**Contact Person:**

**Contact Person Title:**

**Address:**

**Telephone:**

**Email:**

**2019-2021 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

**Type of Organization (check one)**

Government Agency	<input type="checkbox"/>
Private Not-for-Profit	<input type="checkbox"/>
Other	<input type="checkbox"/>

**Area of service (check one)**

Inside Marion and Polk Counties	<input type="checkbox"/>
Outside Marion and Polk Counties	<input type="checkbox"/>
Both inside and outside Marion and Polk Counties	<input type="checkbox"/>

**Organization Days and Hours of Operation**

Day	Hours
Sunday	
Monday	
Tuesday	
Wednesday	
Thursday	
Friday	
Saturday	
Please list any planned periods of service closure greater than 3 days (i.e., closed the week between Christmas Day and New Year's Day)	

**Total transportation program costs by year**

FY18 (historical data, if applicable)	FY19 (projected, if applicable)	FY20 (projected)	FY21 (projected)
\$	\$	\$	\$

**B. PROJECT INFORMATION**

**Project Title** (will be used for reviewer reference and in public comment process. Example: *Mobility Management for City of Utopia Transit Service*)

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**Project service area to be served** (indicate the geographic features that define your service area such as streets, rivers, or jurisdictional boundaries)

North boundary	
West boundary	
South boundary	
East boundary	
Other general geographic area (i.e., within the City of Woodburn)	

*Optional:* please provide a map of your service area as a separate single page 8.5"x11" attachment.

**2019-2021 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

**Start date**

*Provide the date of first work that will be charged to the grant.*

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**Project Service Types (check all that apply)** *What type of services will be supported with this STF grant?*

A. Open to the general public at all times	<input type="checkbox"/>
B. Open only to seniors and individuals with disabilities	<input type="checkbox"/>
C. Demand response	<input type="checkbox"/>
D. Open to the general public on a space-available basis	<input type="checkbox"/>
E. Limited to defined clientele (i.e., group residential home)	<input type="checkbox"/>
F. Deviated route	<input type="checkbox"/>
G. Other (define):	<input type="checkbox"/>

**Project Type (check one)** *Select the project type that you wish to include in your application.*

Project Type	Existing Service	New Service
A. Transit Operations	<input type="checkbox"/>	<input type="checkbox"/>
B. Mobility Management	<input type="checkbox"/>	<input type="checkbox"/>
C. Replacement Vehicle(s)	<input type="checkbox"/>	<input type="checkbox"/>
D. Service Expansion and Right-sizing Vehicles	<input type="checkbox"/>	<input type="checkbox"/>
E. Preventive Maintenance	<input type="checkbox"/>	<input type="checkbox"/>
F. Equipment	<input type="checkbox"/>	<input type="checkbox"/>
G. Signs and Other Bus Stop Amenities	<input type="checkbox"/>	<input type="checkbox"/>
H. Passenger Shelters	<input type="checkbox"/>	<input type="checkbox"/>
I. Facilities (Bus Barns and Other Buildings)	<input type="checkbox"/>	<input type="checkbox"/>

**Total STF funds requested**

\$
----

**Total grant funds requested by year**

	FY20	FY21
STF project	\$	\$

**Scalable STF Grant Request by Year**

*You are strongly encouraged to request the full amount of funding that is needed for each project, including funding for new projects; however, funding is limited. Describe the scalability of your STF funding request, how you scaled down your request and what aspects of the program would not be funded under this funding scenario below. Then enter your scaled down request amounts.*

**2019-2021 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

*Scalability Description (200 words max.):*

	FY20	FY21	Total
Scaled request:	\$	\$	\$

**Identify the project’s additional sources of funding in the table below:**

<b>Estimated Additional Project Resources</b>	
<b>Source of Funds</b>	<b>Dollar Amount</b>
2019-2021 STF Program Request ( <i>Important!</i> )	\$
Local Resources	\$
Federal Resources	\$
Other (provide description):	\$
<b>Project Grand Total</b>	<b>\$</b>

The award of this STF Grant will enable federal funds to be brought to the project.

**Coordinated Plan**

Is project derived from the *Cherriots Coordinated Public Transit – Human Services Transportation Plan* dated August, 2016?  Yes  No If yes, what page(s)? p.

If no, explain why the project is not part of the Coordinated Plan.

*For example: Is the project part of another plan (please name)? Is the plan still being finalized?*

**1. Project Description**

**a.) Describe services or capital investment to be provided by STF funding (limit 500 words).** Answer the following questions in your description:

- Who will you serve?
- What geographic area will you serve?
- What level of service will be provided to customers?
- Operational activities; how will customers request and receive rides, including scheduling and dispatching?
- Describe if volunteers will be utilized to provide service and how this will occur (will the volunteer program be supported with STF or other funds? Will you provide mileage reimbursement to volunteers using their own vehicles?).
- How will the service be marketed?



**2019-2021 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

**b.) Will you coordinate between providers to avoid duplication?** *Describe what level of coordination between partners is done and how duplication is avoided. Limit 200 words.*

**c.) Expected Outcomes**

*Describe the expected outcomes of this project on seniors and people with disabilities. Why is this project the best method to address the needs identified in the Coordinated Plan? Limit 400 words.*

**2. Project Budget**

Enter all costs involved in the **total** cost of the project.

Type	Amount
Labor (payroll)	\$
Contracted services	\$
Materials and supplies	\$
Operations	\$
Preventive maintenance	\$
Capital equipment	\$
Technology	\$
Marketing	\$
Other (describe)	\$
Other (describe)	\$
Other (describe)	\$

**2019-2021 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

<b>Project Total</b>	\$
Amount requested in this grant	\$

**3. Provide a timeline for the project in the following table:**

	<b>Milestone Description</b>	<b>Completion Date</b>
<b>1</b>		
<b>2</b>		
<b>3</b>		
<b>4</b>		
<b>5</b>		
<b>6</b>		

**4. Is your application for a replacement vehicle?**

Yes (continue to #5)     No (go on to Section C)

**5. Enter the following information about each vehicle to be replaced:**

<b>Vehicle Category*</b>	<b>Qty (#)</b>	<b>Cost Each (\$)</b>	<b>Total (\$)</b>	<b>No. Seats w/ADA Deployed</b>	<b>No. of ADA Stations</b>	<b>Total Capacity</b>	<b>Fuel Type*</b>	<b>Estimated Order Date</b>	<b>Estimated Delivery Date*</b>
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
<b>Totals:</b>		<b>Grand Total:</b>	<b>0</b>						

**2019-2021 STF Grant Application  
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**\*Vehicle Category Descriptions:** <http://www.oregon.gov/ODOT/PT/resources/guidance-library/vehicle-descriptions-usefullife-standards.pdf>

**\*Fuel Type Options:** (G) Gas, (D) Diesel, (B) Biodiesel, (HG) Hybrid-gas, (HD) Hybrid-diesel, (CNG) Compressed Natural Gas, (OF) Other alternative Fuel.

**\*Estimated Delivery Date:** Minimum 160 days if ADA accessible.

**5a. Will you use the ODOT/DAS state price agreement contract? (Yes/No).**

If No, describe the needs not addressed in state contracts (e.g., no contracts for trolley-style vehicles, no contracts for buses larger than 44 passengers, etc.).

**5b. Vehicles to be purchased (expansion vehicles only):**

<b>Vehicle Category*</b>	<b>Qty (#)</b>	<b>Cost Each (\$)</b>	<b>Total (\$)</b>	<b>No. Seats w/ADA Deployed</b>	<b>No. of ADA Stations</b>	<b>Total Capacity</b>	<b>Fuel Type*</b>	<b>Estimated Order Date</b>	<b>Estimated Delivery Date*</b>
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		

**2019-2021 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

**C. ORGANIZATIONAL CERTIFICATION**

By submitting this document via email to Salem Area Mass Transit District (SAMTD), I certify that the submitted materials and data included are complete, true and correct. Also, I certify that my organization is:

- Eligible to enter into agreements with SAMTD;
- Has the legal, managerial and operational capacity to do the work to be paid for by the STF;
- Not debarred or suspended from federal grants;
- In compliance with federal, state and local laws and regulations including, and not limited to, those pertaining to passenger transportation, civil rights, labor, insurance, safety and health, as applicable;
- Complies with the laws or rules of the STF Program;
- Properly uses and accounts for the STF Program's goals; and
- Will operate the project or service in a safe, prudent and timely manner.

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Signature of Authorized Organization Officer

Title

Date

**2019-2021 STF Grant Application  
for Projects Located Within Marion and Polk Counties**

**Private Nonprofit Agency – Corporation Status Inquiry and Certification**

If your agency or organization is claiming eligibility as a Section 5310 or STF Program applicant based on its status as a private nonprofit organization, you must obtain verification of its incorporation number and current legal standing from the Oregon Secretary of State Information Retrieval/ Certification & Records Unit (IRC Unit). The “Status Inquiry” document must be attached as an appendix to the application. To assist your agency or organization in obtaining this information, use one of these two methods:

To obtain Corporate Records Information over the Internet, go to:  
<http://sos.oregon.gov/business/Pages/find.aspx> Enter the name of your agency or organization. If its status is active, print the page and submit it as proof.

**Private Non-profits**

Legal Name of Non-profit Applicant:

State of Oregon Articles of Incorporation Number:

Date of Incorporation:

**Certifying Representative**

Name (print):	
Title (print):	
Signature:	Date:



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

*DECEMBER 2018*

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

**Please read carefully!**

### **Introduction**

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

### **Fund Source**

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

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

### **III. Program Goal**

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

### **Eligible Applicants**

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

### **Eligible Activities**

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

### **Biennial Application**

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

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

### **Applicant Qualifications**

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

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

### **Project Qualifications**

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

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



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

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

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

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

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

**VI. Grant Award Process:**

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

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

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

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

**VIII. Application Instructions:**

**A. Organization Information**

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

**Type of Organization**

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

**Area of service**

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

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

**Organization Days and Hours of Operation**

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

**Total transportation program costs by year**

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

**B. PROJECT INFORMATION**

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

**C. ORGANIZATIONAL CERTIFICATION**

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

**IX. Timeline:**

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

## 2019-21 Cherriots STF Grant Application Instructions

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

### Questions? Contact:

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

**2019-2021 Section 5310(ODOT)  
Formula Grant Application  
for Projects Located Within  
Marion and Polk Counties**



# 2019-2021 Section 5310(ODOT) Formula Grant Application for Projects Located Within Marion and Polk Counties

## INTRODUCTION

- Read the *Cherriots 2019-2021 Section 5310(ODOT) Formula Grant Application Instructions* prior to completing this application.
- Each project submitted for funding consideration must have its own application.
- DO NOT submit the application for subrecipients on the “Funding Opportunities” section of the ODOT RPTD website. Only submit this application to Salem Area Mass Transit District (SAMTD) following the instructions referenced above.
- Selection criteria are detailed in the *Application Instructions*.
- This form must be filled out using the online form and submitted in Adobe .pdf format. Paper applications will NOT be accepted.
- Signature pages should be scanned and attached as separate pages to each application.

## Submittal Checklist

### *Make sure*

- ✓ Application is complete, signed, and dated

### *Submit*

- ✓ Proof of agency status (template included in application packet)
- ✓ Maintenance Plan (if submitting an application for preventive maintenance)

## A. ORGANIZATION INFORMATION

**Name of Organization:**

**Employer Identification Number (EIN):**

**Contact Person:**

**Contact Person Title:**

**Address:**

**Telephone:**

**Email:**

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for Projects Located Within Marion and Polk Counties**

**Type of Organization (check one)**

Government Agency	<input type="checkbox"/>
Private Not-for-Profit	<input type="checkbox"/>
Other	<input type="checkbox"/>

**Area of service (check one)**

Inside Marion and Polk Counties	<input type="checkbox"/>
Outside Marion and Polk Counties	<input type="checkbox"/>
Both inside and outside Marion and Polk Counties	<input type="checkbox"/>

**Organization Days and Hours of Operation**

Day	Hours
Sunday	
Monday	
Tuesday	
Wednesday	
Thursday	
Friday	
Saturday	
Please list any planned periods of service closure greater than 3 days (i.e., closed the week between Christmas Day and New Year's Day)	

**Total transportation program costs by year**

FY18 (historical data, if applicable)	FY19 (projected, if applicable)	FY20 (projected)	FY21 (projected)
\$	\$	\$	\$

**2019-2021 Section 5310(ODOT) Formula Grant Application  
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**Risk Assessment**

	<b>Yes</b>	<b>No</b>	
Are any FTA-funded buildings that your transit agency owns located in a flood zone?	<input type="checkbox"/>	<input type="checkbox"/>	
If yes, do you have flood insurance?	<input type="checkbox"/>	<input type="checkbox"/>	
Did your agency have any turnover of management or financial staff in the last two years?	<input type="checkbox"/>	<input type="checkbox"/>	
Does your agency have an accounting system that allows you to completely and accurately track the receipt and disbursement of funds related to the award?	<input type="checkbox"/>	<input type="checkbox"/>	
Does your agency have a system in place that will account for 100 percent of each employee's time?	<input type="checkbox"/>	<input type="checkbox"/>	
Did your staff members attend required trainings and meetings during prior grant awards?	<input type="checkbox"/>	<input type="checkbox"/>	
Was your agency audited by the Federal government in the past two years?	<input type="checkbox"/>	<input type="checkbox"/>	
If yes, did the audit result in one or more audit findings?	<input type="checkbox"/>	<input type="checkbox"/>	
Did your agency stay on budget in the past two years?	<input type="checkbox"/>	<input type="checkbox"/>	
	<b>Manual</b>	<b>Automated</b>	<b>Combined</b>
What type of accounting system does your agency use?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**B. PROJECT INFORMATION**

**Project Title** *(will be used for reviewer reference and in public comment process. Example: Mobility Management for City of Utopia Transit Service)*

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**Project service area to be served** *(indicate the geographic features that define your service area such as streets, rivers, or jurisdictional boundaries)*

North boundary	
West boundary	
South boundary	
East boundary	
Other general geographic area (i.e., within the City of Woodburn)	

*Optional: please provide a map of your service area as a separate single page 8.5"x11" attachment.*

**Start date**

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**2019-2021 Section 5310(ODOT) Formula Grant Application  
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**Project Service Types (check all that apply)** *What type of services will be supported with this Section 5310(ODOT) grant?*

A. Open to the general public at all times	<input type="checkbox"/>
B. Open only to seniors and individuals with disabilities	<input type="checkbox"/>
C. Demand response	<input type="checkbox"/>
D. Open to the general public on a space-available basis	<input type="checkbox"/>
E. Limited to defined clientele (i.e., group residential home)	<input type="checkbox"/>
F. Deviated route	<input type="checkbox"/>
G. Other (define):	<input type="checkbox"/>

**Project Type (check one)** *Select the project type that you wish to include in your application.*

Project Type	Existing Service	New Service
A. Purchased service	<input type="checkbox"/>	<input type="checkbox"/>
B. Mobility Management	<input type="checkbox"/>	<input type="checkbox"/>
C. Replacement Vehicle(s)	<input type="checkbox"/>	<input type="checkbox"/>
D. Service Expansion and Right-sizing Vehicles	<input type="checkbox"/>	<input type="checkbox"/>
E. Preventive Maintenance	<input type="checkbox"/>	<input type="checkbox"/>
F. Equipment	<input type="checkbox"/>	<input type="checkbox"/>
G. Signs and Other Bus Stop Amenities	<input type="checkbox"/>	<input type="checkbox"/>
H. Passenger Shelters	<input type="checkbox"/>	<input type="checkbox"/>
I. Facilities (Bus Barns and Other Buildings)	<input type="checkbox"/>	<input type="checkbox"/>

**Total Section 5310(ODOT) funds requested**

\$
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**Total grant funds requested by year**

	FY20	FY21
Section 5310 project	\$	\$

**Scalable Section 5310(ODOT) Grant Request**

*You are strongly encouraged to request the full amount of funding that is needed for each project, including funding for new projects; however, funding is limited. Describe the scalability of your 5310(ODOT) funding request, how you scaled down your request and what aspects of the program would not be funded under this funding scenario below. Then enter your scaled down request amounts.*

**2019-2021 Section 5310(ODOT) Formula Grant Application  
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*Scalability Description:*

	FY20	FY21
Scaled request:	\$	\$

**Identify the project’s additional sources of funding in the table below**

<b>Estimated Additional Project Resources</b>	
<b>Source of Funds</b>	<b>Dollar Amount</b>
2019-2021 Section 5310(ODOT) Grant Request ( <i>Important!</i> )	\$
Local Resources (to meet matching requirements)	\$
Federal Resources	\$
Other (provide description):	\$
<b>Project Grand Total</b>	<b>\$</b>

**Coordinated Plan**

Is project derived from the *Cherriots Coordinated Public Transit – Human Services Transportation Plan* dated August, 2016?  Yes  No If yes, what page(s)?

p.

If no, explain why the project is not part of the Coordinated Plan.

*For example: Is the project part of another plan (please name)? Is the plan still being finalized?*

**1. Project Description**

**a.) Describe services or capital investment to be provided by Section 5310 funding by answering the questions below based on the type of project (*limit 500 words*):**

- For Purchased Service projects, please provide the following:
  - Explain how your project is planned, designed, and carried out to meet the special needs of seniors and individuals with disabilities when general public transit is either insufficient, inappropriate, or not available.
  - Is this project part of a group of activities or projects that are dependent on each other (for example, a new transit service that requires capital and operating funds)?

## 2019-2021 Section 5310(ODOT) Formula Grant Application for Projects Located Within Marion and Polk Counties

- Does your agency have an existing contract with Cherrriots and/or ODOT to provide transit services? If yes, name the contractor. If no, describe how the transit agency will procure the service and name contractor.
- For Mobility Management projects, please:
  - Explain how your project is planned, designed, and carried out to meet the special needs of seniors and individuals with disabilities when general public transit is either insufficient, inappropriate, or not available.
  - Identify the estimated number of customer contacts, customers trained, or mobility products/services produced. Describe the method you will use to measure output from the project.
- For Vehicle Purchases (replacement or expansion vehicles), please:
  - Describe how the vehicles will be used in service to seniors and individuals with disabilities
- For Equipment, Signs, Amenities, and Shelter projects:
  - Will this project disturb the ground? If yes, an [environmental worksheet](#) including site map(s) showing placement of each item must be submitted to Cherrriots and ODOT, and approved by FTA prior to payment for any ground-disturbing activities. Submittal of the draft environmental worksheets at the time of this application is optional.
  - Describe why these equipment, signs, amenities, and/or shelters are needed and how they will be used in providing transit service to seniors and individuals with disabilities.
- For Facilities including Transit Centers, Bus Barns, and Transit Agency Building projects:
  - Will this project disturb the ground? If yes, an [environmental worksheet](#) including site map(s) showing placement of each item must be submitted to RPTD and approved by FTA prior to payment for any ground-disturbing activities.
  - Explain why this facility project is needed and how the facility will be used in providing transit service to seniors and individuals with disabilities
  - Provide a description of the facility project request as one of the following:
    - Siting and Right-of-Way, Planning, Architecture, Engineering, Project Management, Construction Contracting, Inspecting and Permitting, Interior Surfaces and Furnishings

**b.) Describe how this project coordinates with other services to provide services to seniors and individuals with disabilities. *Limit 200 words.***

**2019-2021 Section 5310(ODOT) Formula Grant Application  
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**c.) Expected Outcomes**

- For Purchased Service projects, please provide:
  - Estimated number of unduplicated individuals (older adults and individuals with disabilities) this project proposes to support in the biennial grant period
  - Estimated number of one-way rides this project proposes to provide in the biennial grant period
- For Mobility Management projects, please:
  - Identify the estimated number of customer contacts, customers trained, or mobility products/services produced. Describe the method you will use to measure output from the project.
- For all projects, please explain why is this project the best method to address the needs identified in the Coordinated Plan? *Limit 400 words.*

**d.) Is this project part of a group of activities or projects that are dependent on each other (for example, a bus washing station that is dependent on a facility)? If yes, please describe.**

**e.) For vehicle purchases and preventive maintenance projects, a Vehicle Preventive Maintenance Plan must be submitted by the time the grant agreement is signed. A plan reflecting current fleet policies, fleet procedures, and vehicle and lift equipment manufacturer's recommended maintenance schedules is required. (add an optional button to attach an electronic document).**

**2. Project Budget**

Enter all costs involved in the **total** cost of the project.

Type	Amount
Labor (payroll)	\$

**2019-2021 Section 5310(ODOT) Formula Grant Application  
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Contracted services	\$
Materials and supplies	\$
Purchased Service	\$
Preventive maintenance	\$
Capital equipment	\$
Technology	\$
Marketing	\$
Other (describe)	\$
Other (describe)	\$
Other (describe)	\$
<b>Project Total</b>	\$
Amount requested in this grant	\$

**2a. Describe the source of your local match funds in the field below (examples: funds from your budget or STF funds). If the matching funds are not available now, describe when they will be (examples: next fiscal year, month/year). Please be specific.**

**3. Provide the timeline of the project in the following table**

	<b>Milestone Description</b>	<b>Completion Date</b>
<b>1</b>		
<b>2</b>		
<b>3</b>		
<b>4</b>		
<b>5</b>		
<b>6</b>		

**4. Is your application for a new vehicle?**

**2019-2021 Section 5310(ODOT) Formula Grant Application  
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Yes (continue to #5)     No (go on to Section C)

**5. Enter the following information about each vehicle to be replaced:**

Year	Make/Model	Vehicle Category*	VIN	Total Seats	ADA Seats	Current Mileage	Vehicle Condition	Maintenance History (Issues, repairs, etc.)
		Choose an item.						
		Choose an item.						
		Choose an item.						
		Choose an item.						
		Choose an item.						

**5a. Will you use the ODOT/DAS state price agreement contract? (Yes/No).**

If No, describe the needs not addressed in state contracts (e.g., no contracts for trolley-style vehicles, no contracts for buses larger than 44 passengers, etc.). Note that under new FTA guidelines, piggybacking on outside contracts is strictly limited.

**5b. Vehicles to be purchased:**

Vehicle Category*	Qty (#)	Cost Each (\$)	Total (\$)	No. Seats w/ADA Deployed	No. of ADA Stations	Total Capacity	Fuel Type*	Estimated Order Date	Estimated Delivery Date*
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
Choose							Choose		

**2019-2021 Section 5310(ODOT) Formula Grant Application  
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an item.							an item.		
Choose an item.							Choose an item.		
Choose an item.							Choose an item.		
<b>Totals:</b>	<b>0</b>	<b>Grand Total:</b>	<b>0</b>						

**\*Vehicle Category Descriptions:** <http://www.oregon.gov/ODOT/PT/resources/guidance-library/vehicle-descriptions-usefullife-standards.pdf>

**\*Fuel Type Options:** (G) Gas, (D) Diesel, (B) Biodiesel, (HG) Hybrid-gas, (HD) Hybrid-diesel, (CNG) Compressed Natural Gas, (OF) Other alternative Fuel.

**\*Estimated Delivery Date:** Minimum 160 days if ADA accessible.

**6. For Facilities projects only (including Transit Centers, Bus Barns, and Transit Agency Buildings), please complete the questions below about your facility project. Please be brief, but thorough, and answer all questions. If your project is tentatively accepted for funding, you may be asked to complete a supplemental application.**

A. Total scope of entire facility project

B. Portion of project scope applied for in this grant. (If all, state this)

C. Proposed total square feet of facility

D. Other secured funding sources for this project

E. Other anticipated funding sources for this project

F. Who are the designated partner agencies for this project?

**2019-2021 Section 5310(ODOT) Formula Grant Application  
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G. Who are the other stakeholders for this project, and how is their support being enlisted?

H. Describe how support from local elected officials or bodies has been formally received for this project.

I. Describe how the project fits into the regional coordinated plan.

J. Has this project been thoroughly discussed with your Rail and Public Transit Section Regional Transit Coordinator and has the Regional Transit Coordinator been involved with preliminary project planning efforts? (Yes/No).

K. Has your local Area Commission on Transportation been involved and is it in support of this project? (Yes/No).

L. Project Milestones: List each of the project's major phases or milestones below. Include associated costs and completion date for each item.

Estimated final completion date of all project activities

M. Is property for facility owned by your agency or an affiliate body? (Yes/No).

If an acquisition, has a firm offer been made on this project, and when?

N. Has preliminary project planning been accomplished for this project? (Yes/No).

O. Have requisite local agency planning, zoning, building permits and all approvals been applied for and received for this project? (Yes/No).

P. Does this project involve changes to any railroad rights of way? (Yes/No).

Q. Have all relevant project documents been attached to your grant application? If not, please send them via email to [ted.stonecliffe@cherriots.org](mailto:ted.stonecliffe@cherriots.org). (Yes/No).

R. Is there any other information you wish reviewers to understand about this project? (Yes/No).



**2019-2021 Section 5310(ODOT) Formula Grant Application  
for Projects Located Within Marion and Polk Counties**

**C. ORGANIZATIONAL CERTIFICATION**

By submitting this document via email to Salem Area Mass Transit District (SAMTD), I certify that the submitted materials and data included are complete, true and correct. Also, I certify that my organization is:

- Eligible to enter into agreements with SAMTD;
- Has the legal, managerial and operational capacity to do the work to be paid for by the Section 5310 Program;
- Not debarred or suspended from federal grants;
- In compliance with federal, state and local laws and regulations including, and not limited to, those pertaining to passenger transportation, civil rights, labor, insurance, safety and health, as applicable;
- Complies with the laws or rules of the Section 5310 Program;
- Properly uses and accounts for the Section 5310 Program's goals; and
- Will operate the project or service in a safe, prudent and timely manner.

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Signature of Authorized Organization Officer

Title

Date

## 2019-2021 Section 5310(ODOT) Formula Grant Application for Projects Located Within Marion and Polk Counties

### Private Nonprofit Agency – Corporation Status Inquiry and Certification

If your agency or organization is claiming eligibility as a Section 5310 or STF Program applicant based on its status as a private nonprofit organization, you must obtain verification of its incorporation number and current legal standing from the Oregon Secretary of State Information Retrieval/ Certification & Records Unit (IRC Unit). The “Status Inquiry” document must be attached as an appendix to the application. To assist your agency or organization in obtaining this information, use one of these two methods:

To obtain Corporate Records Information over the Internet, go to:  
<http://sos.oregon.gov/business/Pages/find.aspx> Enter the name of your agency or organization. If its status is active, print the page and submit it as proof.

### Private Non-profits

Legal Name of Non-profit Applicant:

State of Oregon Articles of Incorporation Number:

Date of Incorporation:

### Certifying Representative

Name (print):	
Title (print):	
Signature:	Date:



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

*DECEMBER 2018*

## 2019-2021 Cherriots Section 5310(ODOT) Formula Grant Application Instructions

### **I. Introduction**

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

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

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

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

### **Fund Source**

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

### **Program Goal**

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

### **Eligible Transit Agencies**

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

### **Eligible Activities**

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

### **Funding**

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

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

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

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

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

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



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

### **II. Coordination Requirements**

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

### **III. Local Match Requirements**

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

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

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

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

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

### **IV. Application Submittal Instructions**

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

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

### **V. Grant Award Process:**

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

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

## **VI. Selection Criteria**

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

## **VII. Application Instructions:**

### **A. Organization Information**

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

#### **Type of Organization**

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

#### **Area of service**

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

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

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

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

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

#### **Risk Assessment**

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



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

## **B. PROJECT INFORMATION**

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

### **1. Project description**

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

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

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

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

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

**1b. Project coordination**

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

**1c. Expected outcomes**

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

**1d and 1e.**

Answer the questions briefly.

**2. Project budget**

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

**3. Project Schedule**

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

#### **4. New Vehicle Question**

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

#### **5. Vehicle Information**

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

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

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

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

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

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

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

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

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

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

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

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

### C. ORGANIZATIONAL CERTIFICATION

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

### VIII. Timeline:

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

Questions? Contact:

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