



SALEM AREA MASS TRANSIT DISTRICT — DIVERSITY, EQUITY AND INCLUSION PLAN

Final Report

Prepared for:

Salem Area Mass Transit District
555 Court Street NE
Salem OR 97301

Final Report
July 2022

Prepared by:

Keen Independent Research LLC
701 N 1st Street
Phoenix AZ 85004
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**KEEN
INDEPENDENT
RESEARCH**



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SUMMARY REPORT — Introduction

Salem Area Mass Transit District (“Cherriots”) aims to cultivate a more inclusive and equitable workplace for its staff and reaffirm its commitment to fairness and respect towards all members of the diverse Salem community. To do so, Cherriots engaged Keen Independent Research LLC (Keen Independent) in 2021 to assess equity and fairness in its personnel policies and practices through a diversity, equity and inclusion (DEI) study, and develop a context-specific DEI Strategic Plan.

Research Approach

This study began January 2021 and concluded in July 2022. Over the course of this time period, the study team utilized the following research methods to gather information and data:

- Focus groups with internal stakeholders;
- Virtual workshops with Cherriots staff, riders and community members;
- Quantitative workforce disparity analysis;
- Evaluation of Cherriots policies, programs, practices, complaints and budgets;
- Case studies of transit agencies’ approach to local and state legislation engagement;
- Literature review of academic and non-academic resources; and
- Review of additional input via mail, designated telephone hotline and email address.¹



Study team. Suzanne Donaldson of Donaldson Consulting LLC assisted Keen Independent in this project. Cherriots staff were also instrumental in completing certain research components, especially obtaining information from riders.

Community input. Keen Independent obtained input from more than 300 employees, external stakeholders, riders and other community members as part of this project. For anonymity and privacy, Keen Independent analyzed and coded comments without identifying any of the participants.

¹ Study hotline: 503-498-8518; email address: cherriotsdei@keenindependent.com; and mailing address: 100 Fillmore Street, 5th Floor, Denver CO 80206.

Introduction

Organization of the Report

This report is organized in five parts:

1. Key definitions;
2. Why diversity, equity and inclusion?;
3. Summary of findings;
4. Recommendations; and
5. Diversity, Equity and Inclusion Strategic Plan.

Information discussed in this summary document are supported by the following appendices:

- Appendix A provides demographic information about the Cherriots workforce.
- Appendix B reviews employment policies and practices.
- Appendices C and D summarizes results of virtual workshops (Appendix C) and focus groups (Appendix D) held with employees.
- Appendices E and F provide an external perspective via external stakeholder virtual workshops (Appendix E) and rider virtual workshops (Appendix F).
- For additional community context, Appendix G provides an overview of feedback from Cherriots' Citizen's Advisory Committee.
- Appendix H summarizes analysis of Cherriots procurement policies and programs through an equity lens.
- Appendix I provides an analysis of Cherriots' budgeting processes.
- Appendix J provides an evaluation of past DEI-related complaints filed at Cherriots, as well as complaints processes.
- Appendix K assesses how public transportation agencies engage in lobbying and advocacy efforts with a focus on political initiatives related to community mobility.
- As public safety becomes a growing area of national concern within the realm of DEI, Appendix L evaluates Cherriots' current public safety efforts.
- Appendix M summarizes equity-centered communications best practice for public agencies, such as Cherriots, to utilize during the implementation of DEI strategies.
- Appendix N provides information about public agency citizen advisory committee best practices.
- And, Appendix O reviews literature — academic and non-academic — to better understand the historical background of the Salem, Oregon region as well as DEI in transit agencies.

Key Definitions

To ensure consistent understanding of Cherriots' DEI Strategic Plan, Keen Independent provides definitions for key terms and language used in the Plan below.

Diversity. Variation of a group based on traits such as race and ethnicity, gender identity or expression, age or life stage, nationality, veteran status, language, religious affiliation, sexual orientation, disability, lived experience, income, neighborhood, communication style and more. Diversity includes all the ways in which people differ.

Equity. Acknowledging and addressing historic and current disparities experienced by Cherriots customers as well as local residents, businesses, neighborhoods and employees. Determinants of equity include the social, economic, geographic, political, physical environment and conditions in which people live.

Inclusion. The act of creating an environment and workspace where all individuals and groups are valued, respected and supported as they contribute to the mission and success of an organization.

Inequities. Differences in well-being that disadvantage an individual or group in favor of another.

Disadvantaged. Being in a powerless position in a community or group.

Minority group. A group that coexists with others in society, yet is subordinate to larger, more powerful groups.

This report primarily uses definitions of minority groups used by the federal government and in U.S. Census Bureau data and other information. However, minority race groups and racial identity change over time and are often context specific. Broad race or ethnicity categories also ignore diversity within groups. The demographic data that Keen Independent had for this study are somewhat simplistic.



Stakeholders. Individuals or groups who are impacted by, have expertise in or are concerned with a particular issue.

Underserved. People, places and communities that have not had or do not have equitable resources or access to services, in general. These groups may have disparities in both services and outcomes.

Why DEI?

Groups such as the Transportation Research Board, American Public Transportation Association and others sponsor research and conferences on DEI in transportation. Such research has worked hard to answer the question, “Why should an organization utilize finite resources on DEI?” This section provides just a few responses to this question. Appendix O further explores this topic.

Internal Benefits of DEI

Internal benefits include the following:

Producing higher-quality work. Workplaces that emphasize DEI experience an elevation of business performance by 31 percent on average.²

Improved organizational decision-making. Employees with diverse backgrounds bring diverse thinking, communication and decision-making skills. A variety of these skills have been found to improve organization-wide decision-making, as diverse colleagues tend to consider a broader range of possibilities than more homogenous organizations.³

Increased innovation. Research has found a positive relationship between diversity among an organization’s managers and innovative practices, which has increased revenues.⁴

Increased profitability. Private sector organizations with DEI programs have a 35 percent greater likelihood for above-average financial returns than those organizations without.⁵ Those that focus on honing an inclusive culture are twice as likely to meet or exceed fiscal targets.⁶

Greater competitiveness. Diversity initiatives strengthen long-term market competitiveness of companies while simultaneously producing short- and medium-term performance improvements.⁷

Increased team satisfaction. Diverse, inclusive and equitable workplaces build trust among workers, particularly those of minority racial, gender, sex and ability groups. They also shift perceptions of cultural differences towards being a resource for new approaches, ideas, learning and more. These, and many other facets of diversity, result in workforces that are more satisfied than non-diverse workforces.⁸

² McKinsey & Company. (2020). “Diversity Wins: How Inclusion Matters.” Retrieved September 2, 2021, from <https://www.mckinsey.com/featured-insights/diversity-and-inclusion/diversity-wins-how-inclusion-matters>

³ Ely, R. & Thomas, D. (2020). “Getting Serious About Diversity.” *Harvard Business Review*. Retrieved July 1, 2021, from <https://hbr.org/2020/11/getting-serious-about-diversity-enough-already-with-the-business-case>

⁴ Shufeldt, J. (2021). “The Importance of DEI.” LinkedIn. Retrieved September 2, 2021, from https://www.linkedin.com/pulse/importance-dei-john-shufeldt-md-jd-mba-facep?trk=articles_directory

⁵ McKinsey & Company. (2020). “Diversity Wins: How Inclusion Matters.” Retrieved September 2, 2021, from <https://www.mckinsey.com/featured-insights/diversity-and-inclusion/diversity-wins-how-inclusion-matters>

⁶ Shufeldt, J. (2021). “The Importance of DEI.” LinkedIn. Retrieved September 2, 2021, from https://www.linkedin.com/pulse/importance-dei-john-shufeldt-md-jd-mba-facep?trk=articles_directory

⁷ Employment and Social Affairs. (2003). “The Costs and Benefits of Diversity.” *European Commission*.

⁸ Ely, R. & Thomas, D. (2020). “Getting Serious About Diversity.” *Harvard Business Review*. Retrieved July 1, 2021, from <https://hbr.org/2020/11/getting-serious-about-diversity-enough-already-with-the-business-case>

Why DEI?

External Benefits of DEI

External benefits to transportation organizations include:

Increased social equity. DEI initiatives advance equity at a social level, as workers bring equity knowledge to spaces outside of the organization. This ultimately shapes non-workspaces in positive ways.⁹

Local economic benefits. Research conducted by Keen Independent across the country suggests that race and gender discrimination may have reduced the number of businesses owned by people of color and by women by 10 to 50 percent, depending on the industry and community. These lower rates of business startups and higher rates of business failure have reduced the economic capacity of communities such as Salem, as well as the economic vibrancy of community agencies, such as Cherriots. Race and gender discrimination negatively impacts employment opportunities in a community as well, especially for people of color. Addressing these barriers results in the community approaching its normal economic capacity, which generates secondary effects that benefit other local businesses, agencies and institutions as more money circulates through the local economy.

Improved services. DEI efforts foster community engagement and better data collection. This information allows a transportation organization to tailor its services and practices in ways that better suit customer needs. Ultimately, DEI initiatives lead to improved service delivery and efficient use of available resources.

⁹ Shufeldt, J. (2021). "The Importance of DEI." LinkedIn. Retrieved September 2, 2021, from https://www.linkedin.com/pulse/importance-dei-john-shufeldt-md-jd-mba-facep?trk=articles_directory

¹⁰ Estrada, S. (2021, January 13). "Workplace D&I in 2021 Will Keep External Community in Mind." HR Drive. Retrieved April 20, 2022, from

Community connections and trust. Equity efforts by an agency communicate to members of disadvantaged groups an openness for community-agency connections and trust. Equity work tends to increase organization transparency as well (through sharing of information and outreach interactions) and is viewed by diverse individuals as "investments" in their communities.¹⁰

Crafting opportunities for diverse partnerships. DEI efforts can attract more community organization and business partners for an agency. Such partnerships lead to benefits such as greater diversity in recruitment, as more people see equity-focused agencies as potential workplaces.¹¹

Usefulness of Communicating Benefits

Communicating DEI benefits to leaders, employees, riders and the community is advantageous to a transportation agency. Doing so can promote stakeholder buy-in and support — particularly among potential skeptics — as well as provide a "business case" for equity work that may be important to stakeholders. When producing communications materials for DEI strategies, agencies should include these benefits.

<https://www.hrdrive.com/news/workplace-di-in-2021-will-keep-external-community-in-mind/593297/>

¹¹ Ibid.

Summary of Findings — Governance and community engagement

Until three years ago, Cherriots Board members were elected; however, they are now appointed by the Governor. As a result, the makeup of the Board has become more diverse in recent years. Advising the Board and Cherriots leadership is a Citizens’ Advisory Committee (CAC), a group that was reinstated in recent years.

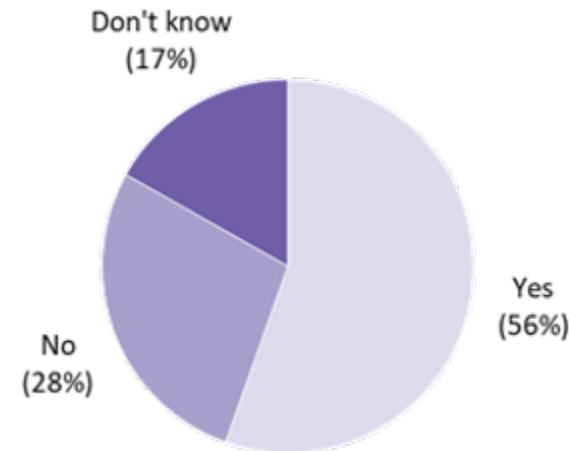
Study results regarding governance and Cherriots’ engagement with the local Salem community include:

- The agency is poised with the opportunity for the CAC to play a stronger role in identifying and communicating DEI issues.
- The CAC and other citizens advisory committees can act as a recruitment pathway for individuals to serve on the Board.
- “Burn-out” is an issue among community leaders asked to provide input and serve on public advisory groups, such as the CAC. (Note that this is a national issue, and not specific solely to Cherriots.) It is easier to recruit participants to a one-time virtual meeting than to serve on a standing committee.
- The Cherriots Board could further support DEI-related topics in an advocacy role.

Participation of Cherriots in local lawmaking. Cherriots leaders were interested in determining if the agency should engage in local lawmaking processes. Study findings show that slightly more than half of external virtual workshop participants commented that the agency should engage in local lawmaking, particularly regarding transportation and transit legislation. See Figure 1 for reference.

However, some stakeholders worried that doing so would spread Cherriots’ resources too thin and detract from the original services and purposes of the agency (see comments in Appendix E).

1. External respondents’ opinion on whether Cherriots should participate in law-making efforts related to transportation and mobility, 2021



Additional information about transit-related legislative efforts can be found in Appendix K.

Summary of Findings — Workforce

Workforce Disparity Analysis

To better understand the state of internal equity at Cherriots, Keen Independent utilized data from 2017 to quantitatively analyze whether there were demographic disparities on the basis of race, ethnicity or gender within the workforce, as well as in hiring, promotions and separations practices. (These data were the most complete and current at the time the work was performed.)

The study team found the following:

- Workers of color and women are underrepresented in hiring.
- Minority employees and women were substantially underrepresented at Cherriots based on employment data for 2017 and availability in the local labor pool (which is comprised of adults living within the Salem Metropolitan Statistical Area). (See Figure 2.)
- Workers of color and women separate from Cherriots at a higher rate.
- In the realm of promotions, no disparities between the expected promotion rate and the actual promotion rate of any studied groups were found.

Detailed analysis of Cherriots’ workforce can be found in Appendix A.

Examples of comments from stakeholders regarding the diversity of Cherriots’ workforce are included to the right.

2. Overall Cherriots workforce, 2017

	(a) Employees	(b) Percent of employees	(c) Availability	(d) Disparity index (b/c)
Race/ethnicity				
People of color	25	13.1 %	36.4 %	36
Non-Hispanic white	166	86.9	63.6	137
Gender				
Women	63	33.0 %	44.8 %	74
Men	128	67.0	55.2	121

Note: Column (d) scores below 80 (highlighted) are substantial disparities.

Source: Cherriots employee data, Census ACS data for availability analysis

Hire diverse people ... employees should represent community.

External virtual workshop participant

[Put] more POC [people of color] and women in place of power.

Internal virtual workshop participant

Hire more POC [people of color].

External virtual workshop participant

Summary of Findings — Workforce

The study team analyzed formal policies, procedures and practices surrounding hiring, recruitment, employment and equity-related budgeting at Cherriots. This section broadly summarizes results.

Hiring and Recruitment

Analysis of Cherriots hiring and recruitment policies finds:

- The agency makes a concerted effort to recruit and hire diverse candidates. However, per workforce analysis findings, Cherriots still struggles to attract minorities and women to particular positions.
- Cherriots also abides by federal Equal Employment Opportunity and Affirmative Action hiring and recruitment standards.
- Cherriots can utilize organizations and events within and outside of the Salem area to its advantage and improve hiring pipelines for diverse candidates. Pipelines include educational partnerships and internship programs.
- The agency can expand outreach techniques for inclusion of more diverse candidates. Comments are provided to the right.

More information on this topic is noted in Appendix B.

Participate in outreach to educational institutions to promote careers in transit.

Internal virtual workshop participant

We should have a staff person who can work within the underserved communities to find out their needs instead of just telling them what we have.

Internal virtual workshop participant

...forming relationships with local middle and high schools to expose kids to possible future careers ... [donate] a couple of buses to a high school so they could train the kids on the mechanics and electronic systems used on the buses. Shop classes could be places for engine mechanics lessons. Internships should be offered to high school and college students to get them acquainted with Cherriots and the career possibilities. There is a shortage of transit planners in the industry in large part because no one knows what a planner does.

Internal virtual workshop participant

... go out of your way to try and appeal to people who may have never considered Transit as a career.

Internal virtual workshop participant

Consider recruiting from up and down the I-5 corridor, partnering with community colleges and vocational ed programs.

Internal virtual workshop participant

Summary of Findings — Workforce

Employment Practices

Keen Independent analysis of employment practices found:

- Approximately 80 percent of internal virtual workshop participants felt they could bring their whole selves to work to Cherrlots. By “bringing your whole self to work,” participants meant:
 - Being comfortable at work;
 - Feeling free to share personal characteristics and beliefs with others; and
 - Showing up ready to work hard towards organizational goals.

Yet, of the 20 percent that felt they could not, most were women, indicating a potential issue at Cherrlots.

- Most internal participants perceived Cherrlots to be an equitable public transit system (63%).
- Evaluation of Cherrlots’ employment policies and practices found that policies and programs are, on their face, largely free of formal equity-related issues.

While generally positive, employees noted certain organizational practices that could affect inclusion at Cherrlots and discourage employees from bringing their whole self to work, such as:

- Organizational close-mindedness;
- Complacency of managers and leadership;
- Lack of needed resources to increase diversity (e.g., funding and staff); and
- Political or personal leanings.

Institutional behaviors. Many people here are set in their ways and can't see beyond what they believe is possible. We need more visionaries and more acceptance of growth.

Internal virtual workshop participant

Listen to more than just words. Learn to understand the cultural context and establish trusted relationships with a meaningful number of individuals that represent the voice of a diverse group of people that is representative of the full spectrum of our community.

Internal virtual workshop participant

A lack of open minded and progressive ideals could restrict the growth of equity in the workplace.

Internal virtual workshop participant

Some staff may push back or not fully embrace DE&I based on lack of knowledge of what it truly means. Some staff may also believe that DE&I is a passing trend and therefore not accept. Leadership and line managers should regularly speak positively about DE&I and the positive outcomes that organizations are experiencing as a result of embracing it.

Internal virtual workshop participant

Political agendas and voices that do not represent the communities they claim to represent.

Internal virtual workshop participant

The soft bigotry of continuing to call a community or group out as marginalized will ensure difficulty in the effort.

Internal virtual workshop participant

Summary of Findings — Contracting

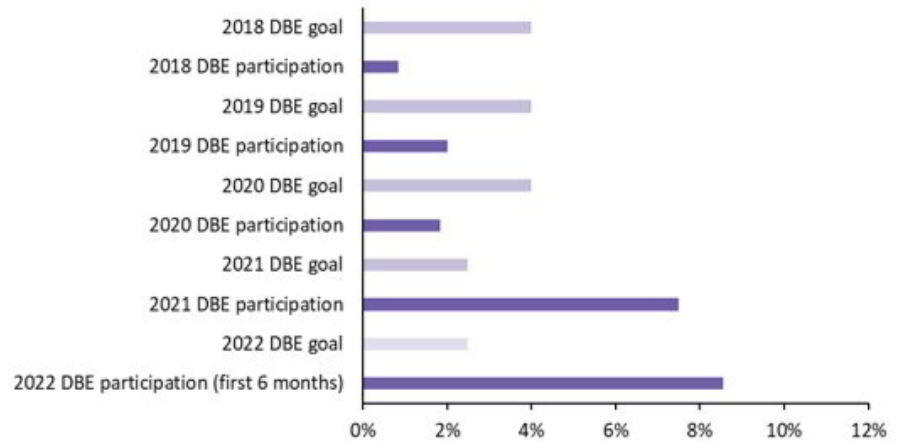
As a recipient of U.S. Department of Transportation funds, Cherriots is required to operate the Federal Disadvantaged Business Enterprise (DBE) Program. Minority and women-owned firms that have been certified as DBEs by the State of Oregon’s Certification Office for Business Inclusion and Diversity (COBID) can be counted towards annual DBE goal.

Keen Independent analysis of Cherriots’ contracting practices found:

- Cherriots follows procurement practices that are standard for public agencies in Oregon.
- Efforts to promote DBE participation are mostly limited to outreach.
- Cherriots had difficulty meeting its overall DBE goal in previous years. However, recently, the agency has met its goal of 2.49 percent, as reflected in Figure 3.

More detailed information about procurement at Cherriots is outlined in Appendix H.

3. Overall DBE participation in Cherriots contracts, FFY2018–FFY2022



Summary of Findings — Additional insights

Additional Stakeholder Insights

Internal and external stakeholders provided additional insight on topics such as:

- Perceptions of the agency;
- Services;
- Accessibility;
- Service delivery;
- Decision-making processes; and
- Outreach and communications.

Comments are summarized by topic.

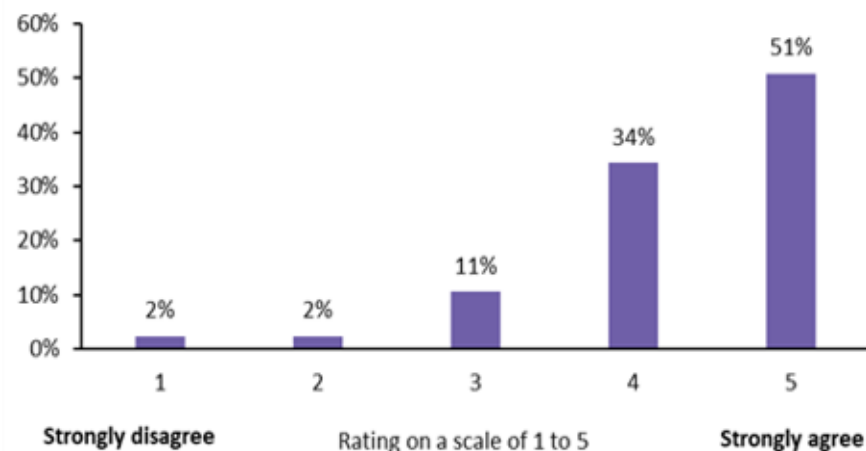
General community attitudes toward Cherrriots. While most internal study participants perceived Cherrriots to be an equitable public transit, only one-third of external participants perceived the agency to be so. Therefore, there is a clear divide between those inside and outside of Cherrriots regarding the agency’s approach to equity.

Despite this, as shown in Figure 4, about 80 percent of external participants rated Cherrriots’ relationship with the Salem-Keizer Community as a three or higher (on a five-point Likert scale). Additionally, the agency receives almost no formal complaints from riders, and very few reported rude drivers or other staff.

These indicate that while perceptions of equity within Cherrriots operations may be lacking among some community members, the community largely views its relationship with the transit agency as positive.

Detailed information about community perceptions of Cherrriots can be found in Appendices E, F and G.

4. Riders’ response to the statement that Cherrriots has a “good” relationship with the Salem-Keizer community, 2021



Summary of Findings — Additional insights

Emphasis on accessibility. Stakeholders emphasized the importance of accessibility throughout a rider’s entire route — from the front door of their residence to front door of their destination — as a factor of equity in transit services. Features that impact accessibility (and thereby equity) include:

- Affordability;
- Walkability;
- Routes;
- Frequency;
- Reliability of services;
- Cleanliness of vehicles and stops; and
- Safety.

To many, Cherriots met the basic standards of accessibility. For example:

... the district works hard to accommodate riders with disabilities.
Internal virtual workshop participant

For others, improvements could be made. Comments of this nature are included to the right, and further information is provided in the qualitative Appendices C, D, E, F and G.

We are making good steps, but more could be done, including more POC and highlighting our benefits for the LGBTQIAP+ community
Internal virtual workshop participant

I see a number of areas in town where ... there isn’t a crosswalk. And you have to navigate down several blocks, to then get across the street and then to walk over to get to a bus stop or wherever you might be going.
Citizen Advisory Committee member

Cherriots seems geared to the lower income and people with disabilities. It is not geared to pick up people in distress and take them to a mental or drug treatment facility.
External virtual workshop participant

Needs later service hours, more frequency [and] longer service on weekends
Internal virtual workshop participant

It would be better to have smaller more efficient vehicles going into neighborhoods making it more convenient for riders.
External virtual workshop participant

Summary of Findings — Additional insights

Service to disadvantaged communities. To better understand perceptions of agency services for disadvantaged communities, participants were asked if Cherriots equitably serves historically disadvantaged groups. One-half of internal participants responded in the affirmative, while most external participants responded that they were unsure.

Comments on this topic are presented below.

It appears that community has to work around the bus schedule as opposed to bus services around the needs of the community!

External virtual workshop participant

We struggle with the economics of serving everyone in our region. We simply don't have the resources or infrastructure to serve all the neighborhoods and the rural communities.

Internal virtual workshop participant

Personally, my bus ride experiences have not seen ethnically diverse population on the bus. Mostly homeless or people near to the streets.

External virtual workshop participant

Information on this topic is summarized in Appendices D and E.

Equity within decision-making processes. Stakeholders noted an importance of keeping diversity, equity and inclusion at the forefront of decision-making processes. Emphasis was placed on the need to evaluate how decisions regarding routes, fare pricing and service delivery are made, specifically whether these decisions can be done more equitably. For example:

The thing that concerns me is that the best transit that we have is towards the central part of the town If you're out on the fringes then it can be a long way to a bus stop In situations like now where we have reduced service 20 percent That has disenfranchised a good chunk of [people] in my part of town.

Citizen Advisory Committee member

Prioritization of DEI at Cherriots. Over half of internal participants reported that Cherriots leadership prioritizes equity. They identified noticeable effort on the part of leaders as proof, such as the creation of a DEI Subcommittee, the changing demographics of the Board and more. Generally, comments were positive, such as:

The Cherriots board and Executive Leadership Team are getting more and more diverse. There is a growing sense that the leadership of the organization should reflect the demographics of the community, and things are slowly changing for the better.

Internal virtual workshop participant

Summary of Findings — Additional insights

Training and Team Building

Analysis and stakeholder feedback found issues with the agency's lack of DEI-focused training, as, of the writing of this report, Cherriots staff have only been provided harassment prevention training. Comments of this type are included below:

I would like to see specific continued education for all employees. [not just] ... at the beginning of our employment.

Internal virtual workshop participant

We need EVERYONE to have some kind of training in this area. Many of "the leaders" seem to think they are above personal growth and that its only the staff that need help.

Internal virtual workshop participant

Offer training for employees. help them build their skills to be bigger contributors of community. Invest in them and good things will happen.

External virtual workshop participant

Keen Independent finds that Cherriots Board members, leadership and staff are prepared for regularly scheduled equity training, such as on implicit bias and inclusive managing practices.

Public Safety

As with any public transit agency, maintaining safety for riders and staff is one of Cherriots' priorities. The agency does so through partnerships with a private security company and Salem Police Department as well as de-escalation training of staff and coach operators.

In general, the frequency of requests for police assistance and exclusions from bus service have substantially declined over the past few years. However, homelessness and mental health conditions continue to be factors which influence safety situations on Cherriots vehicles, at stops and in facilities.

These conditions are not unique to Cherriots or the Salem area. Agencies across the country handle similar issues.

Comments on this topic include:

An equitable public transit system should be clean, friendly, inviting, and safe for its community.

External virtual workshop participant

The homeless can't afford \$4 for a day pass.

External virtual workshop participant

Summary of Findings — Additional insights

Outreach

Participants overwhelmingly emphasized the need for (and power of) outreach by Cherriots in the local community to keep people informed of services, service changes and DEI efforts.

In addition to increasing the amount of outreach conducted, participants recommended the following engagement strategies:

- Highlight agency DEI achievements rather than solely discussing plans for efforts;
- Publicize equity efforts via bus advertisements, posters, flyers and digital communications;
- Utilize multilingual communications during outreach; and
- Publicize the diversity of Cherriots' leadership and Board.

Examples of comments are provided to the right.

Additional information about DEI communications strategies is provided in Appendix M.

Advertising via posters to be set up at the windows of each nonprofit agency.

External virtual workshop participant

Be creative in reaching out. Go to them through flyer in electric bill, knocking on doors, info booth at neighborhood supermarket, and/or frequent the same social services they do. Do a ride along with Meals on Wheels.

Internal virtual workshop participant

It can be best communicated by actions, not words or press releases.

External virtual workshop participant

Needs to be more than talking points/trainings. Proof is in the data.

External virtual workshop participant

We need to develop partnerships with organizations that represent the historically marginalized communities.

Internal virtual workshop participant

Seek input from different communities, workers, students and different parts of our communities.

External virtual workshop participant

Maybe visit community churches, social media for feedback.

External virtual workshop participant

Summary of Findings — Diversity, Equity and Inclusion Strategic Plan

With study findings in mind, Keen Independent presents an evidence-based Diversity, Equity and Inclusion (DEI) Strategic Plan tailored to the needs and contexts of Cherriots. This plan aims to set agency strategies for the Cherriots' DEI strategic process, displayed in Figure 5, regarding the following functions and processes:

- Governance and community engagement;
- Workforce;
- Contracting;
- Services;
- Service delivery; and
- Internal and external communications.

Lists of DEI strategies, by topic, are included on the following pages. Please note that these strategies have been approved by Cherriots leadership.

Responsible parties. Parties responsible for initiating the listed DEI strategies and following through with efforts include Cherriots General Manager, Human Resources Manager, Procurement staff and Communications staff.

5. Diversity, equity and inclusion strategic process



Summary of Findings — Diversity, Equity and Inclusion Strategic Plan

6. Governance and community engagement DEI strategies

Governance and community engagement

1. Embrace Cherriots' key role in addressing equity in the community
2. Continue Board statements to community and staff regarding DEI
3. Continue work of Board DEI Committee, including review of progress on DEI efforts and framing board discussions in terms of DEI
4. Strengthen the Citizens Advisory Committee and utilize it as a pipeline for Board member recruitment
5. Hold one-time, low-commitment "listening sessions" with community members, which can serve to recruit CAC members
6. Encourage Budget Committee to embed DEI in budget review
7. Continue to embed DEI in all statements of purpose, from mission and values through strategic and operating plans
8. Advocate for transit-dependent populations and related issues beyond Cherriots

Summary of Findings — Diversity, Equity and Inclusion Strategic Plan

7. Workforce DEI strategies

Workforce

1. Continue substantial ongoing efforts and policies to encourage and protect employees
2. Further expand recruitment of diverse groups for jobs with few diverse workers
 - Analyze representation by job
 - Develop additional (multilingual) recruitment materials and methods
 - Expand partnerships with community organizations
 - Present and distribute information in a culturally relevant manner
3. Build pipelines for jobs that currently show little diversity, working with schools and other groups
4. Review job descriptions to eliminate any barriers to hiring diverse employees
5. Continue to encourage representation of people of color and women in interview panels
6. Monitor rates of hiring, promotions and separations and explore reasons for any disparities
 - Develop annual reports that are reviewed by senior leadership
 - Regularly conduct employee surveys with DEI questions (and analyze results by group)
7. As appropriate, discuss any potential barriers to DEI with union leadership
8. Build DEI into regular in-person employee and supervisor training, inclusive of represented employees (DEI principles should be routine)
9. Incorporate DEI objectives in leadership team performance reviews
10. Ensure strong informal complaints processes that minimize fear of retribution
11. Cultivate voluntary Employee Resource Groups (ERGs) that include represented and non-represented employees
12. Engage with employees through education, professionalization and empowerment
13. Continue to use exit interviews with departing staff to further improve policies, practices and programs

Summary of Findings — Diversity, Equity and Inclusion Strategic Plan

8. Contracting DEI strategies

Contracting

1. Partner with DBE Program activities of other agencies in Oregon (including TriMet)
 - Share lists of interested firms and participate in joint outreach
 - Introduce DBE contractors and vendors to Cherriots staff
2. Reach out to DBEs for bids for procurements under \$150,000
3. Communicate the overall DBE goal to prime contractors and request list of subcontractors for bids
4. Encourage representation of people of color and women in evaluation panels
5. Review contract specifications and evaluation criteria to minimize any barriers
6. Examine whether contractors (and subcontractors) are promptly paid
7. Consider conducting or participating in a transit-focused disparity study in Oregon
 - Develop future overall DBE goals based on data from a disparity study
 - Consider whether to implement DBE contract goals program based on study results
8. Strengthen DBE Program Plan and develop SBE Plan (for non-FTA-funded contracts)

Summary of Findings — Diversity, Equity and Inclusion Strategic Plan

9. Services and service delivery DEI strategies

Services and service delivery

Services provided

1. Continue to expand financial resources for Cherriots to be able to maintain and improve level of services throughout service area
2. Continue to consider options to better serve areas with lower-cost housing (often not downtown) and cross-town riders
3. Continue to work with local governments to address accessibility of portion of trip to bus stop
4. Consider new approaches to hear from underserved groups when making service decisions

Service delivery

1. Provide additional training to employees and supervisors about challenges around public safety issues and riders in distress
2. Add staffing and mobile component to private security contract to better respond to issues on busses
3. Strengthen relationships with law enforcement beyond Salem PD
4. Partner with social service organizations to address riders in distress

Summary of Findings — Diversity, Equity and Inclusion Strategic Plan

10. Communications DEI strategies

Internal and external communications

1. Invest in telling the Cherriots story (including around DEI), highlighting changes and achievements
2. Expand multilingual communications
3. Evaluate communications for culturally conscious messaging, avoid tokenization
4. Seek stakeholder feedback on efforts and messaging and communicate to the public
5. Seek out and learn from hard-to-reach community members who could use Cherriots but do not

Summary of Findings — Implementation

Next Steps

With research results and the proposed DEI Strategic Plan in hand, Cherriot's leaders can take the following next implementation steps:

1. Review Keen Independent recommendations for suitability within Cherriot's processes.
2. Obtain approval (and consensus) across leadership regarding the DEI Strategic Plan.
3. Work with leadership and staff to integrate elements of the DEI Strategic Plan into other organizational plans (and departmental workplans).
4. Assign equity-related responsibilities to specific parties and ensure an understanding of duties.
5. Set and organize equity benchmarks and communicate them internally (and externally, as appropriate).
6. Plan for and allocate equity-related resources (i.e., staffing, funding and time).
7. Set multi-year check-ins (several times per year, over several years) with leadership and managers regarding DEI progress.
8. Create an internal and external communications strategy to share the DEI Strategic Plan with stakeholders, and communicate current and future successes.

APPENDIX A. Quantitative Workforce Analysis

To better understand the state of equity internally at Cherriots, Keen Independent analyzed whether there were disparities among the workforce, and in hiring, promotions and separations at Cherriots.

This report is organized in the following sections:

- Methodology;
- Workforce results;
- Hiring results;
- Promotion results;
- Separation results;
- Results by EEO-4 job group; and
- Summary.

A. Quantitative Workforce Analysis — Methodology

Keen Independent performed four types of analyses regarding representation of people of color and women in Cherriot's jobs: overall workforce, hiring, promotions and separations.

Employment Data

Keen Independent obtained Cherriot's data on employees in its jobs and Census Bureau data on workers available for employment within the local labor market. Due to limited data availability, the analyses could not be performed for all disadvantaged groups, such as members of the LGBTQ community.

Cherriot's employees. Cherriot is subject to certain reporting requirements set by the Equal Employment Opportunity Commission (EEOC). EEO documents include information on employees for each EEO job category and by race, ethnicity and gender. Job categories include the following:

- Administrators and officials;
- Professionals;
- Technicians;
- Protection service workers;
- Paraprofessionals;
- Administrative support workers;
- Skilled craft workers; and
- Service maintenance workers.

Using the data reported in these forms, the Cherriot's Equal Employment Opportunity Plan and other documents, Keen Independent collected information on the Cherriot's workforce as of January 1, 2015, and June 30, 2017, as well as the hires that occurred in 2017.

Keen Independent performed the analyses using the following race and ethnicity categories:

- African American;
- American Indian and Alaska Native;
- Asian American or Pacific Islander;
- Hispanic American;
- Other minority; and
- Non-Hispanic white.

Due to small sample size, Keen Independent combined American Indian and Alaska Native with "other minority." This category also includes non-Hispanics of two or more races.

For some of the analyses, there were too few individuals in specific groups to perform meaningful analyses. Therefore, Keen Independent provides results for people of color compared with non-Hispanic whites when appropriate. Similarly, there were too few women of color in most analyses to produce meaningful results that incorporate both race and gender.

Separations and promotions. Cherriot's provided Keen Independent with the number of promotions and separations from each EEO job group by race, ethnicity and gender for FFY2015 through FFY2017.

Data for separations do not include separations due to death, retirement or health reasons.

A. Quantitative Workforce Analysis — Methodology

Workers in the Local Labor Pool

Keen Independent obtained data on workers in the labor force that live within the Salem Metropolitan Statistical Area (MSA) from the American Community Survey (ACS) dataset for 2017. Census data combined Yamhill County along with the two MSA counties (Marion and Polk), which lowered the percentage of workers who are people of color. Data provide worker counts by occupation within each EEO job group.

Analytical Approaches

For each type of employment analysis, the study team compared outcomes for Cherriots with calculated benchmarks. The study team presents results by EEO-4 group where sample size allows.

Cherriots employees in 2017 compared with workers in the local labor market. Keen Independent compared the demographic characteristics of employees within each EEO-4 job group with the characteristics of workers in those jobs within the three-county area.

The study team weighted results of the availability analysis for each job group based on the share of Cherriots workers that held a job within that group. For example, if individuals in EEO-2 (Professionals) comprised 15 percent of Cherriots workers, data for Professionals in the ACS data received that weight when calculating a benchmark.

Cherriots hiring compared with workers in the local labor market.

Keen Independent compared the demographic characteristics of Cherriots hires with the local labor force using the same approach as above, except that the weights for the ACS data were based on the share of Cherriots hires for each job group. If individuals in EEO-2 (Professionals) comprised 10 percent of Cherriots hires, for example, the data for EEO-2 workers in the ACS data received that weight when calculating overall demographic characteristics of potential hires in the labor market.

Promotions of Cherriots employees. For each EEO-4 group, the study team calculated a ratio of promotions per employee by dividing the number of people in each group who received a promotion by the number of people, on average, employed in that group over the study period. For 2016, when Cherriots did not submit an EEO Report, Keen Independent averaged the number of employees per group from 2015 and 2017.

The EEO-4 group of the employee receiving the promotion was determined based on the job from which the individual was promoted.

The benchmark for expected number of promotions per employee for people of color or women for an EEO-4 job group was determined by:

1. Finding the total number of promotions (for all workers) in each year for each group of jobs;
2. Based on the share of total employees that people of color comprised for a group of jobs in a year, calculating the expected number of promotions in that year (multiplying total promotions by share of employees for each year);
3. Summing results across years; and
4. Expressing results as a ratio of promotions per employee (dividing expected promotions by average number of employees of color).

For all EEO-4 job groups combined, Keen Independent conducted this analysis to determine benchmarks for individual racial and ethnic groups.

A. Quantitative Workforce Analysis — Methodology

Separations of Cherriots employees. Keen Independent calculated the number of separations per employee in the same way as number of promotions per employee (discussed on the previous page). Separations due to retirement, death or health reasons were not included in the analysis.

Note that although separations are more frequent among employees who were recently hired, data for length of time at job were not available. Therefore, one limitation of the separation analysis is that it did not account for job tenure.

Disparity indices and “substantial disparity.” For each type of analysis for each group, Keen Independent calculated disparity indices by dividing the observed outcomes by the benchmark for that group and then multiplying the result by 100.

A value of “100” indicated parity for the race/ethnicity group or women. Keen Independent applied the 80 percent rule when determining whether or not a disparity index indicated a “substantial disparity.” Any comparisons with a disparity index of less than 80 in the following tables is flagged as substantial (through different shading). In the case of separations, an index above 120 indicates a substantial disparity (as it is 20 percent higher than what was expected for that group if separations were randomly distributed across groups).

A. Quantitative Workforce Analysis — Results

Overall Workforce

Workers of color were underrepresented at Cherriots based on employment data for 2017 and availability in the local labor pool. People of color were 13 percent of Cherriots workers in that year compared with 36 percent of the workers in the three-county area (after adjusting for occupation). The disparity index of 36 indicates that the number of workers of color was about one-third of what would be expected based on availability of workers in the Salem-Keizer area. A disparity index less than 80 indicates a substantial disparity. (See Figure A-1.)

Similarly, the representation of women among Cherriots workers was less than what we would expect based on their share of the local labor force. This disparity was also substantial.

These results are largely consistent with the workforce analysis included in Cherriots' Equal Employment Opportunity Program for 2018–2021.

Hiring

Analysis of Cherriots hires from 2017 found substantial disparities among people of color and women. Both minorities and women were hired at substantially lower rates than expected based on their share of the local labor pool. (Note that the benchmarks for hiring for 2017 were calculated based on the mix of positions hired in that year.)

These results, shown in Figure A- 2, are similar to those from the overall workforce analysis (Figure A-1).

Study team results are also largely consistent with the hiring analysis included in Cherriots' Equal Employment Opportunity Program for 2018–2021.

A-1. Cherriots workers, 2017

	(a) Employees	(b) Percent of employees	(c) Availability	(d) Disparity index (b/c)
Race/ethnicity				
People of color	25	13.1 %	36.4 %	36
Non-Hispanic white	166	86.9	63.6	137
Gender				
Women	63	33.0 %	44.8 %	74
Men	128	67.0	55.2	121

Note: Column (d) scores below 80 (highlighted) are substantial disparities.

Source: Cherriots employee data, Census ACS data for availability analysis

A-2. Hiring of workers in Cherriots jobs, 2017

	(a) Hires	(b) Percent of hires	(c) Availability	(d) Disparity index (b/c)
Race/ethnicity				
People of color	10	15.2 %	37.9 %	40
Non-Hispanic white	56	84.8	62.1	137
Gender				
Women	22	33.3 %	44.3 %	75
Men	44	66.7	55.7	120

Note: Column (d) scores below 80 (highlighted) are substantial disparities.

Source: Cherriots employee data, Census ACS data for availability analysis

A. Quantitative Workforce Analysis — Results

Promotions

Overall, there were no substantial disparities between the expected promotion rate and the actual promotion rate among Cherriots employees in 2017.

Note that there were relatively few promotions among Cherriots employees during the study period. One explanation is that Cherriots employees advance by applying to other positions rather than through traditional promotions. This type of advancement warrants further investigation.

While these results are largely consistent with the promotions analysis included in Cherriots' Equal Employment Opportunity Program for 2018–2021, Cherriots found adverse impacts among women and some minority groups among professionals, technicians and administrative support workers at Cherriots.

Separation Results

Keen Independent examined voluntary and involuntary departures of employees for FFY2015–FFY2017 after excluding death, retirement and departure due to health reasons. The study team then calculated rates of departure per employee. People of color left their jobs at about twice the rate as non-Hispanic white employees (see Figure A-4).

Even though there were few departures in this time period, the disparity index of 176 for people of color marks a substantial difference between actual and expected rates of separation. Note that disparity indices of 120 or higher are considered substantial in separation analyses.

Women did not separate from these jobs at a higher rate than men. Cherriots' Equal Employment Opportunity Program does not include an analysis of employee separations.

A-3. Promotions of workers in Cherriots jobs, FFY2015–FFY2017

	(a) Promotions	(b) Average number of employees	(c) Promotions per employee (a/b)	(d) Benchmark	(e) Disparity index (c/d)
Race/ethnicity					
People of color	4	25	0.163	0.112	145
Non-Hispanic white	17	163	0.105	0.112	93
Gender					
Women	6	62	0.097	0.112	86
Men	15	126	0.119	0.112	106

Note: Column (e) scores below 80 (highlighted) are substantial disparities.

Source: Cherriots employee data.

A-4. Separations of workers in Cherriots jobs, FFY2015–FFY2017

	(a) Separations	(b) Average number of employees	(c) Separations per employee (a/b)	(d) Benchmark	(e) Disparity index (c/d)
Race/ethnicity					
People of color	6	25	0.245	0.139	176
Non-Hispanic white	20	163	0.123	0.139	89
Gender					
Women	7	62	0.113	0.138	82
Men	19	126	0.151	0.138	109

Note: Separations exclude death, retirement and departure due to health reasons. Column (e) scores of 120 or higher (highlighted) are substantial disparities.

Source: Cherriots employee data.

A. Quantitative Workforce Analysis — Results

Results for Service Maintenance Workers

Keen Independent attempted to perform these workforce and separation analyses for each EEO-4 job group, but the size of the workforce in each job group limited the review to service maintenance workers (the job group that constitutes more than one-half of Cherriots employees).

Also due to data constraints, the result to the right focus on overall workforce (Figure A-5) and job separations (Figure A-6).

Workforce results for service maintenance. Figure A-5 presents the workforce results for 2017 Cherriots service maintenance employees.

About 15 percent of service maintenance employees were people of color, which was about one-third of what one would expect based on availability among local service maintenance workers. Similarly, the 27 percent representation of women in these jobs was about two-thirds of what would be expected based on availability among service maintenance workers in the labor market.

Separation results for service maintenance. Figure A-6 shows separation results for Cherriots service maintenance workers. As with previous separation analyses, disparity indices of 120 or higher are considered substantial.

Compared to non-Hispanic whites and men, people of color and women working as Cherriots service maintenance workers separated from their jobs at higher rates than expected. However, the small total number of separations from these jobs indicates caution in interpreting these results. Further tracking is warranted.

A-5. Cherriots service maintenance workers, 2017

	(a)	(b)	(c)	(d)
Service maintenance	Employees	Percent of employees	Availability	Disparity index (b/c)
Race/ethnicity				
People of color	18	15.4 %	45.9 %	34
Non-Hispanic white	99	84.6	54.1	156
Gender				
Women	32	27.4 %	39.5 %	69
Men	85	72.6	60.5	120

Note: Column (d) scores below 80 (highlighted) are substantial disparities.

Source: Cherriots employee data, Census ACS data for availability analysis

A-6. Separations of Cherriots service maintenance workers, FFY2015–FFY2017

	(a)	(b)	(c)	(d)	(e)
Service-maintenance	Separations	Average number of employees	Separations per employee (a/b)	Benchmark	Disparity index (c/d)
Race/ethnicity					
People of color	3	18	0.17	0.12	136
Non-Hispanic white	11	96	0.12	0.12	93
Gender					
Women	5	31	0.16	0.12	131
Men	9	83	0.11	0.12	88

Note: Separations exclude death, retirement and departure due to health reasons. Column (e) scores of 120 or higher (highlighted) are substantial disparities.

Source: Cherriots employee data.

A. Quantitative Workforce Analysis — Results

Summary

Keen Independent’s analysis of Cherriots’ workforce, hiring, promotions and separations found:

- People of color were substantially underrepresented among Cherriots workers compared to their share of the Salem-Keizer area labor pool. Women were also substantially underrepresented among Cherriots workers.

Further analysis of service maintenance workers found that relative to availability in the local labor market, people of color were substantially underrepresented among Cherriots staff. Compared to their availability, women were also substantially underrepresented among service maintenance workers.

- For Cherriots hires in all job groups, people of color were substantially underrepresented compared to their share of the local labor pool. Women were also substantially underrepresented among hires.

- Among all Cherriots employees, people of color separated from their jobs at a substantially higher rate than would be expected. (Separations do not include departures due to death, retirement or health reasons.)

Analysis by job group found high rates of separation for both people of color and women working as service maintenance workers. Although these disparities were substantial, further tracking and review is needed as the total number of separations was very small.

- Although there were relatively few promotions during the study period, the analysis found no substantial disparities for people of color nor women working at Cherriots.

This analysis indicates disparities for some race and ethnicity groups among the workforce, hires and employee retention. Disparities in the workforce and in separations appear to be larger for service maintenance workers.

These results are based on limited data. Cherriots would benefit from continued tracking and analysis of not just overall workforce and hiring, but separations as well.

APPENDIX B. Workforce Policies and Practices — Hiring and recruitment

This document summarizes Salem Area Mass Transit District’s (Cherriots) workforce policies that relate to diversity, equity and inclusion (DEI).

Policies and Practices

Cherriots has several policies and programs in place to encourage DEI in hiring and recruitment, as detailed in this section.

Cherriots application. Cherriots’ employment application is standard. The application includes EEO forms. It also follows the State of Oregon’s “Ban the Box” initiative, in which criminal history is not discussed.

Equal Employment Opportunity (EEO) and Affirmative Action (Policy 310). Cherriots follows federal standards for EEO and Affirmative Action. Policy 310 is enforced by the Human Resources Director, who also acts as the appointed investigator of EEO-related complaints. Past Keen Independent studies have found that, when possible, a separation between EEO enforcement and Human Resources provides employees with more confidence in the EEO complaints and investigations process.

Current partner organizations for recruiting. Cherriots recruits candidates from the sources including:

- Handshake;
- Women’s Transportation Seminar (WTS);
- Hire Heroes USA;
- Diversity Jobs;
- Partners in Diversity;
- Goodwill;
- Easterseals; and
- Chemeketa Community College.

B. Workforce Policies and Practices — Potential additional partners for recruitment

There are additional opportunities, sites and organizations that Cherriots may find useful for recruiting diverse candidates. They include the following:

- **Incite.** A Salem community non-profit that assists with workforce development;
 - **Catholic Community Services, Salem.** A community services non-profit that helps youth, single parents, persons with disabilities and more achieve independent living, which includes employment placement.
 - **Silverton Together.** A community organization in Silverton that publicizes local events and opportunities through a website and newsletter;
 - **Willamette University.** A local university that holds career development fairs and posts employment opportunities on its online portal;
 - **Additional higher education institutions in the surrounding area.** Schools such as Linn-Benton Community College in Albany, University of Oregon in Eugene, Oregon State University in Corvallis, Reed College and Lewis and Clark College in Portland and Linfield University in McMinnville are just a few additional organizations Cherriots recruiters can reach out to for candidates in the region.
- **Online job posting sites.** Such as:
 - iHispano, for Hispanic Americans and Latinx individuals;
 - Pink Jobs, for LGBTQ communities;
 - Campus Pride Jobs, for recent college graduates who identify as LGBTQ;
 - Workforce50, for individuals over the age of 50;
 - AbilityLinks, for candidates with disabilities; and
 - BlackJobs, for African Americans.
 - **Internships.** Additionally, Cherriots may find value in partnering with local higher education institutions, such as Willamette University, Corban University and Chemeketa Community College to create internship and work-study opportunities.

B. Workforce Policies and Practices — Images in recruitment materials

Cherriots recruitment materials purposefully use images of women and people of color to promote a sense of diversity among potential recruits. See Figure B-1 for an example.

Racialized and gendered imagery can be sensitive and difficult to navigate. The Government Alliance on Race and Equity (GARE)¹ suggests being “as thoughtful about ... images as we are ... language.” To do so, they recommend that organizations invest time and resources in selecting thoughtful imagery that conveys the right message.

- Be true to real communities by using authentic images. Resist the urge to select images of “diversity” if what is shown does not accurately reflect the makeup of the community.
- Avoid images with stereotypes and cultural appropriation.
- Beware of visual “tokenism” where one person of color is used as the “figure head” or focus of the image.
- Avoid whitewashing, including images of lighter-skinned people of color and/or “whitening” images through editing software.

These recommendations should be kept in mind when selecting hiring material imagery.

B-1. Images used in Cherriots’ “Careers” portal

Whether you’re interested in getting behind the wheel of a 40-foot-long bus or more at home with numbers and spreadsheets, Cherriots has a place for you.

Cherriots is a growing organization and needs talented people ready to serve our community. It’s a big challenge. We provide services over a 76-square-mile-area in Salem-Keizer and the Mid-Willamette Valley.

**Working at Cherriots is more than a job;
it’s a career path with many opportunities.**

Skilled transit operators (bus drivers) help Cherriots riders reach their destination in all weather and road conditions. Mechanics and service technicians keep the Cherriots fleet in tip-top shape.



The Cherriots mission of connecting people with places also requires accountants, technicians, information technology specialists, human resources staff, transit planners, and customer service representatives.

Cherriots especially values employees with people skills, who make customer service their highest priority. Cherriots emphasizes career development and employees can advance into supervisory and management positions.

Cherriots provides competitive pay and benefits, including health insurance and a retirement plan. Many of our employees find not only jobs, but a rewarding public service career with Cherriots. We invite you to join our team.

¹ GARE. (2018, May 18). “GARE Communications Guide.” RacialEquityAlliance.org. Retrieved from <https://www.racialequityalliance.org/tools-resources/communication-tools/1-052018-gare-comms-guide-v1-1-2/>

B. Workforce Policies and Practices — Policies and practices to encourage and protect equity

Employment Practices

Cherriots has implemented policies to encourage and protect DEI within the workplace, as described in this section.

Domestic Violence, Sexual Assault or Stalking Leave Policy (Policy 336). The agency provides “reasonable leave” to any full-time employee (employed with Cherriots for at least 180 calendar days) who is suffering or has suffered from domestic violence, sexual assault or stalking. Leave is intended for the employee to seek out treatment, legal advice, safe residence and more.

Some employers extend protections for victimized employees by including provisions to provide reasonable accommodations, such as safety measures, worksite transfers, reassignments, modified schedules, altered work telephone number and email address and changed locks.² Cherriots may consider adding such provisions.

Pregnancy Accommodations and Protections (Policy 344).

Cherriots provides reasonable accommodations related to pregnancy, childbirth and other related conditions, and pledges not to allow pregnancy or childbirth impact employment opportunities. The agency’s policy is standard and upholds the fundamental requirements of the EEOC’s Pregnancy Discrimination Act.³

² SHRM. (n.d.). California domestic violence, sexual assault, stalking leave policy. *Society for Human Resource Management*. Retrieved from https://www.shrm.org/resourcesandtools/tools-and-samples/policies/pages/california-domestic-violence_sexual-assault_stalking-leave-policy.aspx

³ U.S. EEOC. (2015). Enforcement guidance on pregnant discrimination and related issues. *United States Federal Government*. Retrieved from <https://www.eeoc.gov/laws/guidance/enforcement-guidance-pregnancy-discrimination-and-related-issues>

Bilingual Pay Differential (Policy 365). Cherriots offers a pay differential to customer service employees who use bilingual abilities in 10 percent or more of their workday. Additional pay, if approved, is 5 percent more than the base classification pay. This policy is standard.⁴

Prevention of Workplace Discrimination, Harassment and Retaliation (Policy 372). The agency is dedicated to creating a workspace that emphasizes respect, dignity and equal employment opportunities. This policy covers federally protected classes (e.g., race, color, religion, etc.), has clauses that prevent retaliation and explains reporting processes. It is standard.

Improper and Offensive Language in the Workplace (Policy 375). Cherriots has language expectations in its workplaces, as outlined in Policy 375. While this policy is standard, it may be beneficial to outline how complaints of offensive language should be reported to managing staff. Doing so will set expectations and processes for staff.

⁴ International Public Management Association for Human Resources. (2006, July). Personnel practices: Bilingual Pay Policies. IPMA-HR. Retrieved from https://www.google.com/url?sa=t&rct=j&q=&esrc=s&source=web&cd=&ved=2ahUKEwjbsMfy-aLOAhXjHzQIHZQICqYQFnoECBAQAw&url=https%3A%2F%2Fwww.ipma-hr.org%2Fdocs%2Fdefault-source%2Fpublic-docs%2Fimportdocuments%2Fhr-solution-topics%2Fipma-hr-bilingualpay&usg=AOvVaw2WUKb_22FcYRTQRHnmuxCk

B. Workforce Policies and Practices — Policies and practices to encourage and protect equity

Equal Employment Opportunity Plan, 2018-2021. In 2018, Cherriots released an Equal Employment Opportunity Plan for 2018 to 2021. This plan included analysis of the agency’s workforce as well as employment practices. Cherriots reported findings summarized below:

- The following job groups were found to be underutilized (by race/ethnicity and gender):
 - Officials and Administrators;
 - Professionals;
 - Skilled Craft; and
 - Service Maintenance.

Cherriots aimed to remedy this by expanding its applicant pool, connecting with regional apprenticeship programs and other local organizations.

- Recruitment and selection processes were found to be purposefully inclusive and employ techniques such as Spanish and English language radio ads and use of multiple job posting sites.
- Testing at Cherriots , if applicable to a position, was found to utilize a nationally validated video test.
- Promotions and transfers practices were found to provide ample time to employees to review promotions opportunities. Employees are also provided preparation training, if desired.
- Employee training was found to center primarily on professional development and job performance enhancement. Cherriots planned to initiate a tuition-reimbursement program for non-represented employees to advance workforce education in 2019.

- Compensation and benefits were found to be fair and equitable. It was noted that Cherriots hires consultants to perform compensation equity analyses. The next analysis was scheduled for late-2018.
- Disciplinary procedures and termination processes were found to be clear and uniform across departments and job types. Grievance processes were notably different between represented and non-represented employees.

Tracking workforce EEO goals. Cherriots tracks EEO goals through the following means:

- Quantitative data collection during hiring process (e.g., applicants are asked demographic questions when completing an application);
- Monthly EEO personnel/General Manager meetings;
- Production of a demographic report for the EEO Officer to review at the end of each recruitment; and
- Regular meetings among leadership to monitor EEO goals and statistics.

B. Workforce Policies and Practices — Training

To date, Cherrlots staff have been provided training on harassment prevention.

Standard training at other public agencies and institutions tends to include far more topics. Therefore, Cherrlots should considering supplementing its current curriculum with training on the following topics:

- EEO rights, responsibilities and processes;
- Encouraging equity and belonging in the workplace;
- Inclusive managing practices;
- Untokening (e.g., understanding the lived experiences of marginalized riders and employees); and
- Implicit bias in hiring and recruitment.

Training can and should be implemented differently for each level of employee (e.g., general employee, manager and leader), as each requires different skillsets and information. As much as possible, DEI topics should be incorporated into routine training rather than solely being stand-alone.

APPENDIX C. Analysis of Employee Virtual Workshop

Keen Independent collected information from Cherriots employees through an internal virtual workshop. Core questions were open-ended and were followed by demographic questions. All employees were invited to participate.

There were 48 internal virtual workshop participants. Most participated online and six filled out hard-copy forms. The virtual workshop was also open to staff of contractors hired by Cherriots. (These responses are discussed at the end of the report.)

Analysis of internal virtual workshops includes the following sections:

- Elements of an equitable public transit system;
- Whether Cherriots fits respondents' vision of an equitable public transit system
- Reasons for responses regarding whether Cherriots fits respondents' vision of an equitable and inclusive public transit system;
- If individuals from historically marginalized communities are equitably served by Cherriots;
- Why participants believe (or do not believe) that individuals from historically marginalized communities are equitably served by Cherriots;
- What can be done about Cherriots' inequitable service of historically marginalized communities (if applicable);
- How Cherriots can ensure that its equity initiatives are inclusive of all individuals including those in hard-to-reach communities;
- Recommendations for Cherriots to become a more just, inclusive and diverse organization;
- Barriers to achieving Cherriots' objective;
- Whether Cherriots leaders clearly prioritize diversity, equity and inclusion;
- Why respondents do or do not believe Cherriots leaders clearly prioritize equity, inclusion and belonging;
- Whether Cherriots employees can bring their whole selves to work;
- What "bringing your whole self to work" means;
- What current or past factors have impacted equity and fairness at Cherriots;
- Suggestions for programs or efforts to break down barriers of bias or exclusion;
- Other input regarding Cherriots' objective of incorporating equity across agency activities;
- Other thoughts or comments; and
- Demographics and Cherriots departments represented.

C. Analysis of Employee Virtual Workshop — Whether Cherrriots provides equitable service

Elements of an Equitable Public Transit System

Cherrriots employees were asked to imagine an equitable public transit system for a community like Salem-Keizer. They were then asked to describe what this type of public transit system would look like. Several respondents reported that Cherrriots currently meets their vision for an equitable public transit system. Other common themes are presented to the right and are discussed below.

Accessibility. About one-third of respondents indicated that an equitable public transit system must be accessible to those who need it. Many types of accessibility were mentioned, including providing options for persons with disabilities (such as additional staff to assist those who need it), providing transit access to people from all socioeconomic backgrounds and ensuring that riders are within a short walk of public transit options (some cited one-quarter of a mile or less as a reasonable walk to public transit).

Affordability. Respondents also commented that equitable public transit should be affordable and in some cases, fares should be free depending on need.

Frequency and reliability. Other participants remarked that frequency and reliability of service are key factors to creating an equitable public transit system.

Other. Respondents also provided other ideas regarding equitable transit systems, including operator input regarding route times. Some commented that an equitable transit system would integrate multiple transit modes. Other respondents remarked on the need for cleanliness and safety at stops and on public transit. This included good lighting so that bus shelters are safer in the dark.

Everyone regardless of their economic or social status is able to get to where they need to go.

Coverage in all areas. A short walk for anyone who needs to use the service, from anywhere in the area.

Buses staffed with an assistant to help the disabled more easily use public transit.

Unlike Portland, our riders NEED to ride, this is not a luxury to avoid congested highways and urban surface streets. We need to reach the elderly, disabled and [those] in need of resources for [getting from place to place].

Reasonable fare.

It also finds ways to remove barriers related to the cost of using the service.

... the known high-volume areas have proportionate levels of bus stops, pulse frequency, and maintenance to support communities who rely significantly on public transport to get where they need to go in their daily lives.

An equitable public transit system should be: clean, friendly, inviting, and safe for its community.

Operator input re: how long a route takes for each time of the day/night.

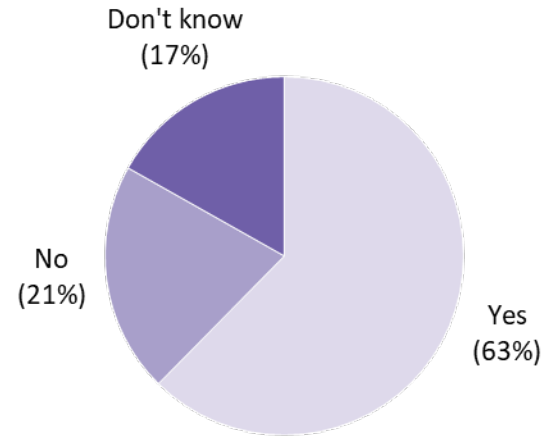
C. Analysis of Employee Virtual Workshop — Whether Cherrriots provides equitable service

Whether Cherrriots Fits Respondents' Vision of an Equitable Public Transit System

Virtual workshop participants were then asked if Cherrriots fits their personal vision of an equitable transit system as described in the previous question. Nearly two out of three respondents reported that Cherrriots fits their vision for an equitable transit system.

The figure on the right presents these results.

C-1. Respondents' opinion on whether Cherrriots fits their vision of an equitable public transit system, 2021



Source: Keen Independent Research Cherrriots Employee Virtual Workshop Survey, Dec. 2021–Jan. 2022.

C. Analysis of Employee Virtual Workshop — Whether Cherriots provides equitable service

Reasons for Responses Regarding Whether Cherriots Fits Respondents' Vision of an Equitable and Inclusive Public Transit System

Participants were then asked to elaborate on why Cherriots does (or does not) fit their vision of an equitable and inclusive public transit system. Some respondents provided reasons why Cherriots is inclusive and equitable, while others provided suggestions for how Cherriots could improve. Responses are summarized below and presented to the right.

Provides accommodations. Many participants commented that Cherriots provides accommodations such as wheelchair ramps and lifts for persons with disabilities.

Cherriots serves all riders throughout the City. Many workshop participants reported that Cherriots is equitable and inclusive because it serves anyone that wants to use it throughout the City.

Need for increased frequency. One area of concern was the need for increased frequency and expanded service in certain areas and at certain times.

Other reasons that Cherriots fits the vision of inclusiveness. Participants noted that Cherriots does not discriminate against riders and that the organization works to create an inclusive environment.

Other ways Cherriots can improve. Respondents also highlighted other ways that Cherriots could become a more equitable and inclusive system. These comments included better ADA accessibility in some areas as well as the need for increased diversity among staff.

... the district works hard to accommodate riders with disabilities.

Cherriots connects all people with all places.

Cherriots allows all riders on the bus unless they don't follow the rules. Access to the transit system is all throughout the city.

There are 15-minute frequency routes which are fantastic, but additional 15-minute frequency routes ... needs some attention

Needs later service hours, more frequency [and] longer service on weekends

The diversity appears to be even with what you find in the area. Everyone is polite to one another, there is a great deal of respect between co-workers.

There are too many areas in Salem and Keizer that lack ADA accessible sidewalks, crosswalks, and curb ramps.

We are making good steps, but more could be done, including more POC and highlighting our benefits for the LGBTQIAP+ community.

C. Analysis of Employee Virtual Workshop — Whether Cherrriots provides equitable service

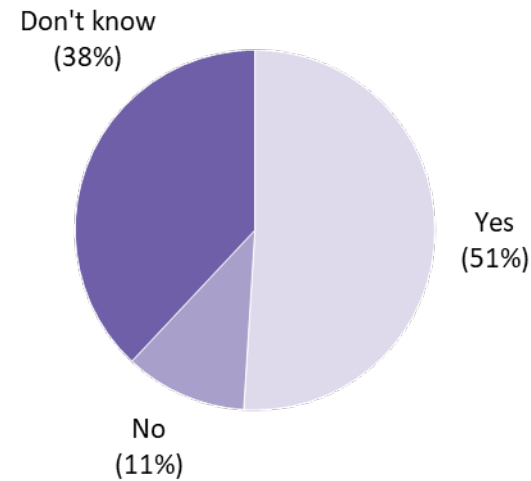
If Individuals from Historically Marginalized Communities Are Equitably Served by Cherrriots

Virtual workshop participants were then asked if Cherrriots equitably serves individuals from historically marginalized communities.

About one-half of respondents reported that they believe that Cherrriots does equitably serve individuals from these communities.

The figure on the right presents these results.

C-2. Respondents' opinion on whether individuals from historically marginalized communities are equitably served by Cherrriots, 2021



Source: Keen Independent Research Cherrriots Employee Virtual Workshop Survey, Dec. 2021–Jan. 2022.

C. Analysis of Employee Virtual Workshop — Whether Cherriots provides equitable service

Why Participants Believe (or Do Not Believe) that Individuals from Historically Marginalized Communities are Equitably Served by Cherriots

Participants were asked to provide more information regarding why they do (or do not) believe that individuals from historically marginalized communities are equitably served by Cherriots. The following themes emerged:

Lack of resources. Among workshop participants who responded that historically marginalized communities are not equitably served by Cherriots, respondents typically remarked that Cherriots lacks the resources to provide the level of service needed.

Frequency based on ridership. Many respondents commented that frequency of Cherriots services is based on ridership.

High level of service for historically marginalized communities. Some respondents commented that Cherriots provides more services to historically marginalized communities than to other communities.

We struggle with the economics of serving everyone in our region. We simply don't have the resources or infrastructure to serve all the neighborhoods and the rural communities.

This is an area that Cherriots is working on; however, there are limitations to having service absolutely everywhere.

Cherriots bases stops and frequency of routes based on ridership.

I believe we focus our service to the areas that need service.

If the definition of equity is service to the historically marginalized communities that is equal or greater than the non-marginalized communities, then Cherriots is doing a good job. According to an analysis of the current (Sept 5, 2021) transit network, 75%+ of minority, low-income, and Limited English Proficient populations within the Salem-Keizer UGB have access to transit, where only 72% of the total population has access within a quarter mile of a fixed route bus stop.

Most places with bus stops are historically marginalized communities.

C. Analysis of Employee Virtual Workshop — Whether Cherrriots provides equitable service

What Can Be Done About Cherrriots' Inequitable Service of Historically Marginalized Communities (If Applicable)

Participants who responded that historically marginalized populations are not equitably served by Cherrriots were then asked what can be done to address this.

Four workshop participants answered this question, and their responses are presented to the right.

Continue to seek to use the resources we have in the best way possible and seek more resources.

Continued focus, discussions, and expansion where and when funding is available.

I am not sure anything can be done.

More frequency. Offer alternative connecting services to main lines.

C. Analysis of Employee Virtual Workshop — Whether Cherriots provides equitable service

How Cherriots Can Ensure that its Equity Initiatives are Inclusive of All Individuals Including Those in Hard-to-Reach Communities

Participants were then asked how to ensure that Cherriots equity initiatives reach communities that might be more difficult to engage. Common suggestions for engagement strategies are outlined below, and respondents' specific ideas are presented on the right.

Community outreach. Two-thirds of respondents recommended engaging with hard-to-reach communities either directly or through community leaders and organizations. Many suggested that Cherriots representatives must go to such areas personally to ask what community needs are.

Other recommendations. Respondents also suggested a variety of other ideas, including planning projects in new communities and providing a high level of customer service. One respondent suggested modifying routes so that people outside of the downtown area do not have to go through downtown to get to various destinations.

Be creative in reaching out. Go to them through flyer in electric bill, knocking on doors, info booth at neighborhood supermarket, and/or frequent the same social services they do. Do a ride along with Meals on Wheels.

We need to develop partnerships with organizations that represent the historically marginalized communities.

Meeting riders, especially riders from hard-to-reach communities I believe, is about meeting them where they are at. Church, neighborhood markets, schools, work, etc. are all places that people are at, go to frequently, and are most comfortable.

We need to mobilize our existing resources — board and committee members are in ideal positions to reach these communities.

Providing high level customer service, rider education, and professionalism among colleagues is an important piece of ensuring community representation.

Start to think outside of a core model that bases downtown Salem as the hub and move to a more distributed transfer model that uses more of a feeder approach. That way people who live in places outside of the central core can get across town without always having to come downtown. It would necessitate a more robust transit center footprint than we have plans for but would undoubtedly increase the District's ability to serve more riders.

By expanding planning projects to new and underserved communities.

C. Analysis of Employee Virtual Workshop — Becoming a more just, inclusive, diverse organization

Recommendations for Cherriots to Become a More Just, Inclusive and Diverse Organization

Virtual workshop participants were then asked what they consider most important for Cherriots to become more just, inclusive and diverse as an organization. Common themes are presented on the right and are as follows.

Clear expectations. Some participants remarked that a clear plan and expectations will help Cherriots achieve this objective.

Hiring. Respondents also suggested that Cherriots hire diverse employees. Some respondents remarked that hiring diverse employees might be difficult in Oregon.

Outreach, including through existing educational institutions. Many respondents remarked that building connections with existing communities through organizations and educational institutions will promote inclusiveness and diversity within Cherriots.

The DEI Plan will help Cherriots to be laser focused on DEI and what each individual, each team, each department, each division can do to support and live diversity, equity, and inclusion every single day at Cherriots. Clear expectations and a plan to follow will help Cherriots to achieve this.

First step: hire diversity.

Hire more POC.

Participate in outreach to educational institutions to promote careers in transit.

We should have a staff person who can work within the underserved communities to find out their needs instead of just telling them what we have.

... forming relationships with local middle and high schools to expose kids to possible future careers ... [donate] a couple of buses to a high school so they could train the kids on the mechanics and electronic systems used on the buses. Shop classes could be places for engine mechanics lessons. Internships should be offered to high school and college students to get them acquainted with Cherriots and the career possibilities. There is a shortage of transit planners in the industry in large part because no one knows what a planner does.

Listen to more than just words. Learn to understand the cultural context and establish trusted relationships with a meaningful number of individuals that represent the voice of a diverse group of people that is representative of the full spectrum of our community.

C. Analysis of Employee Virtual Workshop — Becoming a more just, inclusive, diverse organization

Barriers to Achieving Cherriot's Objective

Virtual workshop participants were then asked what factors could pose a barrier to Cherriot's achieving its objective to become a more just, inclusive and diverse organization. Participants' thoughts are presented on the right and are as follows:

Closed-mindedness and complacency. Many respondents remarked that some people might prefer to continue doing things as they have been done before, and such complacent attitudes could be a barrier to achieving the objective.

Allocation of resources. Some workshop participants noted that lack of funding might get in the way of Cherriot's achieving its objectives. Others mentioned COVID-19 and other concerns regarding staff availability to work on these issues.

Politics, personal interests and discriminatory attitudes. Other respondents remarked that personal beliefs and attitudes, as well as personal interests, could create a barrier.

Other. Some respondents provided other thoughts regarding barriers such as lack of follow-through, the possibility of regressing into past behaviors and lack of training.

Institutional behaviors. Many people here are set in their ways and can't see beyond what they believe is possible. We need more visionaries and more acceptance of growth.

A lack of open minded and progressive ideals could restrict the growth of equity in the workplace.

Some staff may push back or not fully embrace DE&I based on lack of knowledge of what it truly means. Some staff may also believe that DE&I is a passing trend and therefore not accept. Leadership and line managers should regularly speak positively about DE&I and the positive outcomes that organizations are experiencing as a result of embracing it.

Financial prioritization. While there would be some cost involved in expanding our community outreach and offering incentives, the priority should be achieving our objectives.

Political agendas and voices that do not represent the communities they claim to represent.

Attitudes and personal opinions.

The soft bigotry of continuing to call a community or group out as marginalized will ensure difficulty in the effort.

Failure to plan and follow through.

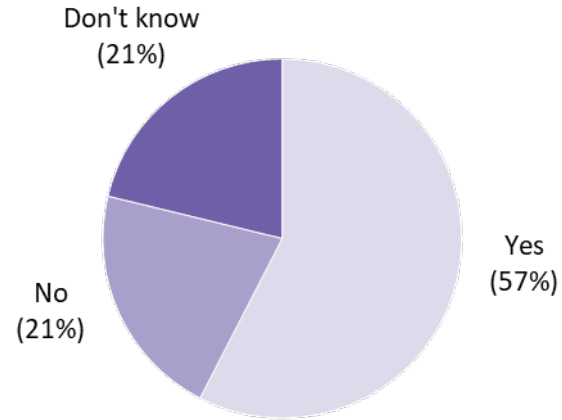
C. Analysis of Employee Virtual Workshop — Becoming a more just, inclusive, diverse organization

Whether Cherriots Leaders Clearly Prioritize Diversity, Equity and Inclusion

Virtual workshop participants were then asked if leaders of Cherriots clearly prioritize diversity, equity and inclusion. About three out of five respondents reported that leaders do.

The figure on the right presents these results.

C-3. Respondents' opinion on whether Cherriots leaders clearly prioritize diversity, equity and inclusion, 2021



Source: Keen Independent Research Cherriots Employee Virtual Workshop Survey, Dec. 2021–Jan. 2022.

C. Analysis of Employee Virtual Workshop — Becoming a more just, inclusive, diverse organization

Why Respondents Do or Do Not Believe it is Clear that the Leaders of Cherriots Prioritize Equity, Inclusion and Belonging

As a follow-up to the previous question, participants were then asked why they believe (or do not believe) that Cherriots leadership clearly prioritizes equity, inclusion and belonging. Responses are presented to the right and summarized below.

Diverse, representative Cherriots staff. Some respondents reported that the diversity of Cherriots staff indicates that Cherriots leaders prioritize equity, inclusion and belonging. Participants remarked that Cherriots employees are representative of the Salem-Keizer community, or that Cherriots employment is moving toward being representative.

Tangible efforts. Numerous respondents pointed out tangible efforts or results which indicate that leaders prioritize equity, inclusion and belonging. Some mentioned concrete actions such as performing this study, the formation of a DEI committee and other specific actions or hiring decisions as examples of leaders actively prioritizing DEI goals.

Need more action/communication. Other respondents remarked that leaders could more effectively demonstrate DEI prioritization through better communication and taking direct actions to promote equity. Some remarked that leaders use the right lingo, but do not always follow through with action.

Other. Some workshop participants provided various other remarks. While some believed that Cherriots works hard to remove obstacles to DEI goals, others commented that the agency does not treat its employees equitably.

The Cherriots board and Executive Leadership Team are getting more and more diverse. There is a growing sense that the leadership of the organization should reflect the demographics of the community, and things are slowly changing for the better.

We have a diverse workforce; our online presence always shows our DEI prioritization.

If they did not, they would not be conducting this study ... [The study] is desperately needed and is long overdue.

The board has expressed its commitment by establishing a designated DEI committee, the new head of HR has expertise and experience in DEI initiatives, we have contracted with a professional service to shape our DEI objectives and goals, [and] our GM has DEI strategy and a performance objective.

There is a lot of talk, but I think we need more action.

They more often use the buzz words, but actions speak louder than words.

It does appear to be half-hearted attempts. Sometimes we need active engagements and need to come up with solutions we created not that we borrowed from another transit system.

The district does not treat current employees with equity.

No one is treated differently; we are all equal.

C. Analysis of Employee Virtual Workshop — Bringing your whole self to work

Whether Cherriots Employees Can Bring Their Whole Selves to Work

Workshop participants were asked, “Where 1 is strongly disagree and 7 is strongly agree, how strongly do you agree that you personally can bring your whole self to work, while employed by Cherriots?”

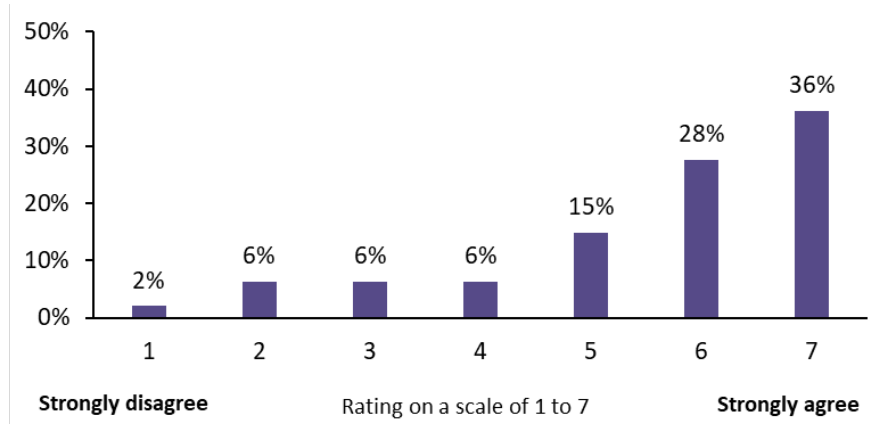
Approximately 80 percent of those surveyed agreed that they can bring their whole selves to work (response 5, 6 or 7), compared with about 6 percent that selected a neutral response (4). About 14 percent of respondents reported disagreeing with the statement (response 1, 2 or 3).

Response distribution is presented in the figure on the right.

Among respondents who indicated that they cannot bring their whole selves to work, the following groups were overrepresented:

- Other minorities were 29 percent of those that indicated not being able to bring their whole selves to work compared to 15 percent of all respondents; and
- Females were 71 percent of people that reported not being able to bring their whole selves to work and 48 percent of respondents.

C-4. Respondents’ opinion distribution on whether they can bring their whole selves to work, 2021



Source: Keen Independent Research Cherriots Employee Virtual Workshop Survey, Dec. 2021–Jan. 2022.

C. Analysis of Employee Virtual Workshop — Bringing your whole self to work

What “Bringing Your Whole Self to Work” Means

Virtual workshop participants were then asked what the phrase “bringing your whole self to work” means to them. Participants provided the responses to the right (summarized below).

Being able to share all aspects of oneself and one’s beliefs at work.

More than two-thirds of workshop participants defined “bringing your whole self to work” as feeling free to share personal characteristics and beliefs with coworkers without fear of retribution or other negative consequences.

Giving 100 percent at work. Other respondents remarked that this phrase means showing up every day ready to work hard toward Cherriot’s goals.

Nothing. A small number of virtual workshop respondents reported that this phrase does not have any meaning for them.

Other. Some participants specified why they personally feel they cannot bring their whole selves to work.

Being oneself without fear of reprimand.

That I feel safe talking about my queerness and paganism. Certain subjects are still a little too much for work and I'm not sure but overall I haven't had any issues.

I'm comfortable expressing myself (in an appropriate manner) at work.

This means being present mentally and physically. This means that I am engaged and focused on the work of the District.

I am free to complete my tasks and objectives associated with the District's mission, values, and brand promise while feeling empowered to make decisions.

I currently censor myself in conversations, staying away from talking about politics or religion. I would like to feel more safe in talking about things that inform who I am.

It means being free to express my personal views. That being said I don't actually expect to be able to do that. I would actually prefer it if my coworkers did not. Unfortunately they do which puts me in a situation where I'm uncomfortable sharing my own views for fear that they may not align with those of my co-workers and for that I may be judged.

Unfortunately I am the lowest on the totem pole and so my ideas and opinions have little value.

C. Analysis of Employee Virtual Workshop — Factors impacting equity and fairness

What Current or Past Factors Have Impacted Equity and Fairness at Cherriots

Workshop participants were also asked what factors, processes or actions have had a positive or negative impact on equity at Cherriots.

Unfair treatment of employees. Several workshop participants commented that Cherriots does not always treat its employees fairly. Examples are presented to the right.

Intentional inclusivity and goal-oriented action. Several respondents remarked that Cherriots behaves intentionally and with goals in mind regarding equity and fairness. Others commented the opposite, that lack of direction and communication have sometimes hindered these goals.

Unaware of any unfairness. Some participants reported that they are not aware of any instances of unfairness or lack of equity at Cherriots.

Other thoughts. Respondents provided other ideas, such as that hiring is not representative of the Salem-Keizer community, or that staff might be stuck in old habits.

Favoritism has become very prevalent in the administration offices.

Issues involving employees held against them for too long without opportunity and notice that the employee has improved and ready to change the behavior.

I appreciate that Cherriots has been intentional to be inclusive about the individuals represented on committees.

... not knowing what's coming / missed information with lack of communication is a negative.

We are being much more intentional, purposeful, and deliberate. Before it felt like were just checking off boxes.

Funding and staff resources have recently been allocated to address this area and to help Cherriots' inclusiveness throughout its organization and services. I have not experienced negative influences in this area in my tenure at Cherriots.

Personnel hired are not representative of the community. This may have had negative impact on riders.

A lack of ... willingness to find ways to engage with all parts of our community in a culturally relevant manner.

C. Analysis of Employee Virtual Workshop — Employee suggestions for improvement

Suggestions for Programs or Efforts to Break Down Barriers of Bias or Exclusion

Respondents were asked for suggestions regarding programs or efforts that Cherriots should consider or avoid when attempting to break down barriers of bias or exclusion. Responses are presented on the right and are summarized below.

Continued training and education for employees. Several respondents suggested that Cherriots employees, including leadership, should be educated on these topics, not just at the beginning of employment but as a continuing effort. Some participants recommended interactive training, and others reported that Cherriots could learn from other organizations, as it may not have up-to-date equity or inclusion training materials.

Outreach, recruiting and partnering with education institutions. Other participants suggested that Cherriots partner with local educational institutions for recruiting purposes. Workshop participants remarked that this might make younger people aware of opportunities to work in public transit.

Team building within Cherriots. Respondents also recommended that Cherriots create opportunities for team building, such as employee exchanges between departments, spaces where people can learn about each other's perceptions and learning to accept others on a personal level.

Other ideas. Some participants commented that breaking down barriers should be done through a lens of positivity, rather than making people feel inferior to others. Others remarked that thinking things through and building meaningful personal connections and programs are key to this effort.

I would like to see specific continued education for all employees. [not just] ... at the beginning of our employment.

We need EVERYONE to have some kind of training in this area. Many of "the leaders" seem to think they are above personal growth and that its only the staff that need help.

I recommend interactive poverty and equity training for employees at all levels, not a 20-minute video that could be ignored but training that requires engagement.

... go out of your way to try and appeal to people who may have never considered Transit as a career.

Consider recruiting from up and down the I-5 corridor, partnering with community colleges and vocational ed programs.

Employee exchange days, where employees work for a day in another department. Would help to build trust and relationships

We have many new hires. The different departments do not have any overlapping tasks / activities. I would like to see something address these two realities with the goal of getting to know each other.

More positivity in our journey, not trying to just react to the issues, but truly thinking and creating meaningful programs.

Positive training based on the Golden Rule is always healthy, but any discussions that accuse white people of "racist" behavior should be avoided.

C. Analysis of Employee Virtual Workshop — Employee suggestions for improvement

Other Input Regarding Cherriot's Objective of Incorporating Equity Across Agency Activities

Virtual workshop participants were also given the opportunity to provide additional input regarding Cherriot's objective of becoming more just, inclusive and diverse and incorporating equity across its activities. Comments are summarized below and presented to the right.

Open-mindedness. Respondents remarked that organizational and personal open-mindedness and willingness to change are key to Cherriot's embedding equity within its activities on an ongoing basis.

Need more diversity. Some participants commented that Cherriot's needs to have more diverse people on the Board and in other positions of power.

Treat people fairly. Other workshop participants responded that Cherriot's employees and leadership need to treat others equally, without bias or favoritism.

Other. Some respondents provided other suggestions, such as creating an overall inclusive organizational culture, defining and measuring what success should look like, updating pay ranges for employees who have been with the organization for a long time and concluding every meeting with a DEI moment (similar to how meetings currently begin with a safety moment).

I think being openminded to issues that arise and able to deal with them objectively instead of lumping everything into one box.

We as an organization and on an individual basis have to be willing to change. We have to be willing to not just go through the motions of fulfilling program objectives, we have to [be] motivated by personally understanding the need in a way that creates a sense of connection to the work that we do. ... It will mean opening up and being willing to feel what [others] feel to really understand.

We need to work on getting more racially diverse people on the board's advisory committees.

More POC and Women in place of power.

Everyone should be treated fairly and without bias no matter what.

Director and upper management training in regard to avoiding favoritism among those under their direction.

That it gets embedded into the culture so it is not just the "fad" of the month program.

... it's only by finding a way to measure success that we'll be able to tell the public how we're doing at achieving our goals.

Update the pay ranges/steps over a 20-25 year range to give incentive to the employees who stick it out

It would serve us well to conclude every meeting with a DEI moment.

C. Analysis of Employee Virtual Workshop — Employee suggestions for improvement

Other Thoughts or Comments

Virtual workshop participants were then asked for any other thoughts or comments regarding Cherriots' efforts to increase equity and inclusion. Common themes are presented below and to the right.

Cherriots is on the right track. Some respondents remarked that they are glad Cherriots is approaching these issues thoughtfully.

Doubts. Other virtual workshop participants expressed reservations regarding Cherriots' objectives. One respondent remarked that leaders might have difficulty with changes, and another commented that changes resulting from the DEI Plan might not be genuine.

Approach this issue with care. Some respondents provided specific suggestions for how Cherriots can approach these issues without alienating employees, such as allowing all employees to have a voice in this objective and ensuring that the DEI Plan does not turn into an attack on existing employees.

Other. Participants also provided other comments. One respondent remarked that Cherriots should get out in the community and discover issues rather than waiting for issues to be presented, and another commented that having to provide their age in order to submit the survey creates an inclusivity issue.

I am glad that Cherriots is working on these issues to its employees and customers.

I am happy we are doing this in a thoughtful approach.

... I doubt "the leaders" will be amenable to learning how to conduct deep self-reflection, so I'm not sure if we will ever have meaningful change in the culture.

If it didn't come naturally from everyone before, it seems it wouldn't be genuine.

Involve all employees and not just management.

I'm all for increasing diversity in our organization. The employees who work here should represent the face of the community. I would caution the Executive Leadership Team and Board of Directors against diving deep into political agendas, which are not healthy in a workplace. We don't want our co-workers to be fighting at work. We want harmony in order to be a high performing team. Mutual respect goes both ways. I don't want the DEI Plan to be an attack on the existing work force. That would be detrimental to the integrity of the organization.

I'm not very happy about having to give my age for this survey to be accepted, how old I am should be irrelevant (and don't get me started on how this impacts inclusivity).

Rather than addressing needs as they are presented, we need to get out there and discover them. We have an opportunity to play a major role in our ever-changing community.

C. Analysis of Employee Virtual Workshop — Characteristics of employee participants

Demographics of Virtual Workshop Participants

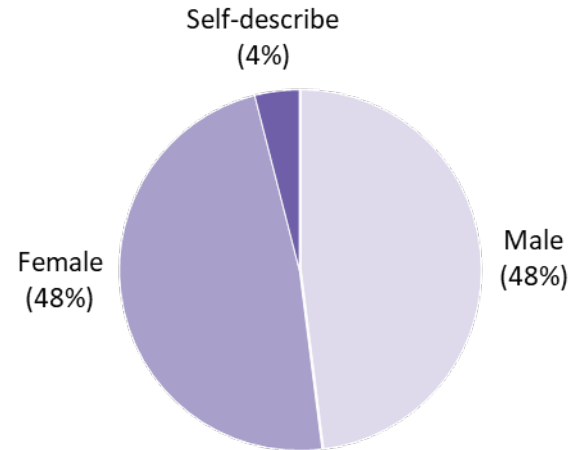
At the end of the survey, virtual workshop participants were asked to provide demographic information.

Gender. There was an equal amount of male and female respondents who completed this survey. The figure on the top right presents these results.

“Self-describe” refers to individuals to do not identify as cisgendered males or females, and therefore were given the option to enter in personal descriptors of their gender.

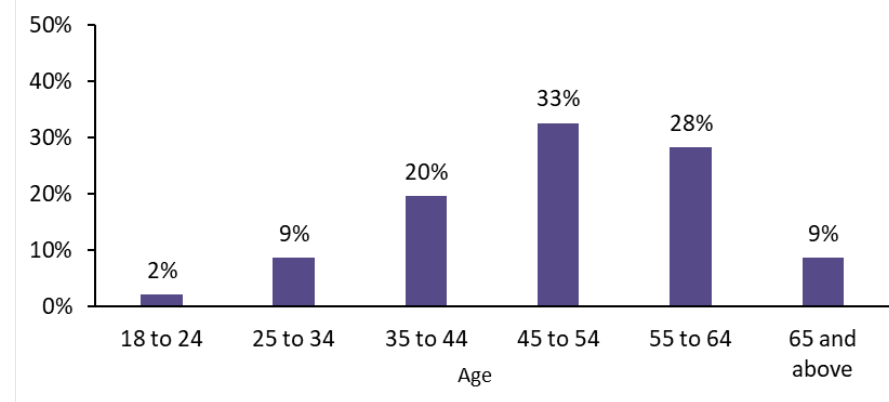
Age group. A majority of respondents were between the ages of 45 and 64. The figure on the bottom right presents these results.

C-5. Respondent gender distribution, 2021



Source: Keen Independent Research Cherrits Employee Virtual Workshop Survey, Dec. 2021–Jan. 2022.

C-6. Respondent age distribution, 2021



Source: Keen Independent Research Cherrits Employee Virtual Workshop Survey, Dec. 2021–Jan. 2022.

C. Analysis of Employee Virtual Workshop — Characteristics of employee participants

Race and ethnicity. About four-fifths of respondents were white.

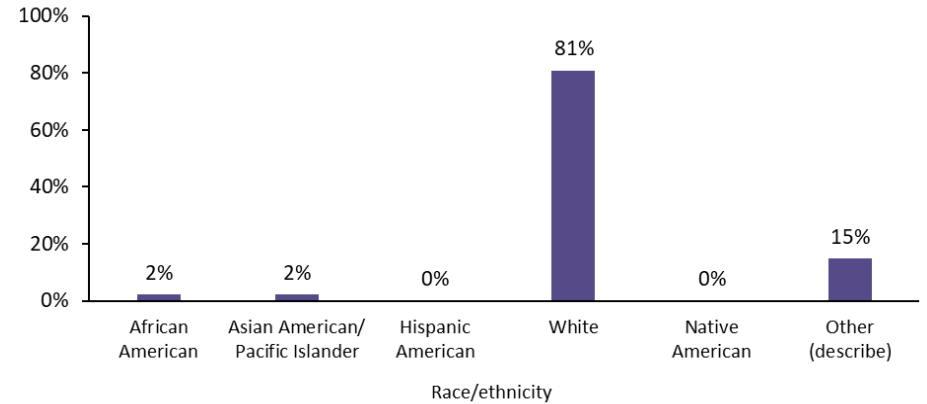
About 15 percent of respondents also selected “other” and then self-described their race/ethnicity. Many of these participants described themselves as biracial or of mixed race.

The figure on the top right presents these results.

Highest level of education. About two out of three respondents reported that they had at least a college degree.

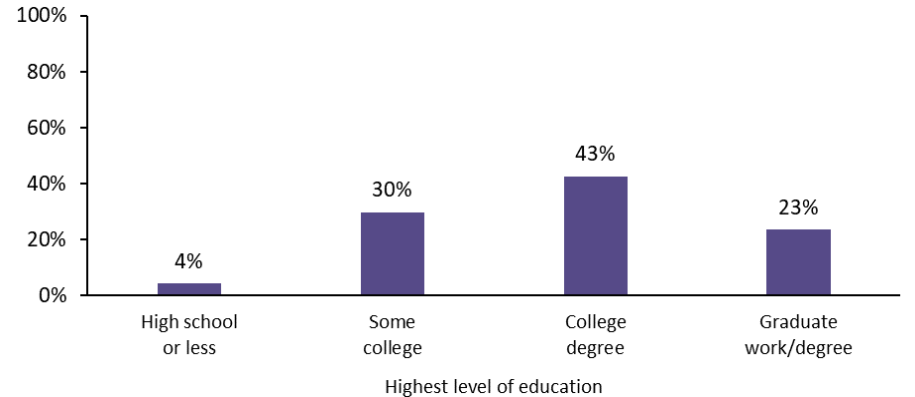
The figure on the bottom right presents these results.

C-7. Respondent race and ethnicity distribution, 2021



Source: Keen Independent Research Cherrits Employee Virtual Workshop Survey, Dec. 2021–Jan. 2022.

C-8. Respondent education attainment distribution, 2021



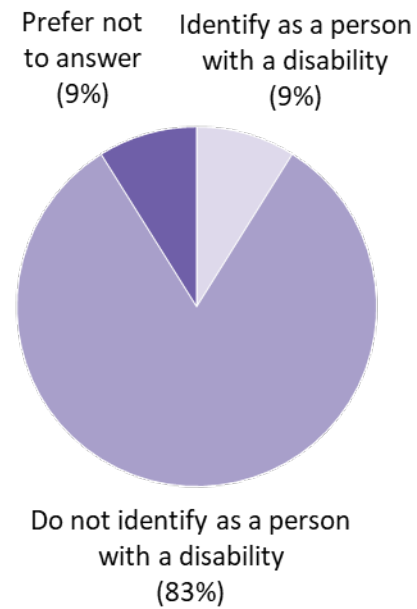
Source: Keen Independent Research Cherrits Employee Virtual Workshop Survey, Dec. 2021–Jan. 2022.

C. Analysis of Employee Virtual Workshop — Characteristics of employee participants

Persons with disabilities. Respondents were asked if they identified themselves as a person with a disability. Approximately 10 percent of respondents reported that they did.

The figure on the top right presents these results.

C-9. Distribution of respondents who identified as persons with a disability, 2021



Source: Keen Independent Research Cherriots Employee Virtual Workshop Survey, Dec. 2021–Jan. 2022.

C. Analysis of Employee Virtual Workshop — Characteristics of employee participants

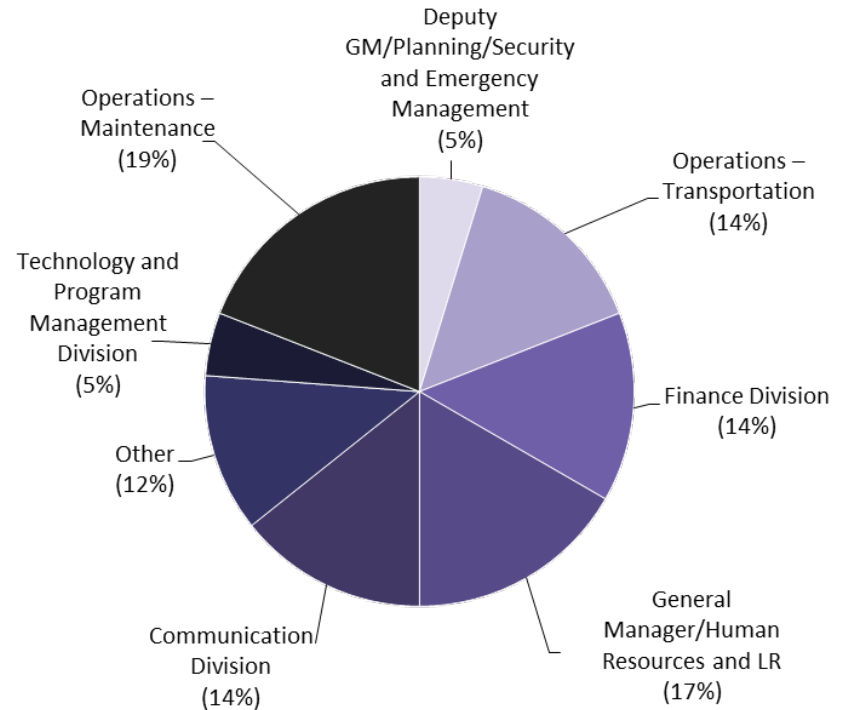
Departments Represented

Virtual workshop participants also asked what Cherriots department or division employs them.

There was wide representation across the organization.

The figure to the right presents these results.

C-10. Distribution of departments represented in the survey, 2021



Source: Keen Independent Research Cherriots Employee Virtual Workshop Survey, Dec. 2021–Jan. 2022.

C. Analysis of Employee Virtual Workshop — Contractor responses

Contractor Employee Responses

There were only two contractor employees who responded to the invitation to participate in the virtual workshop. They were asked the same questions as other internal virtual workshop participants. Responses are presented to the right and summarized below.

Vision of equitable public transit system. Respondents reported that their vision of an equitable public transit system included providing equitable service and access to users and said that Cherriots meets their vision of an equitable public transit system.

Historically marginalized communities. The two respondents differed in their responses regarding Cherriots service towards marginalized communities. Suggestions on how this could be improved included making additional outreach to those historically marginalized through events in schools and job fairs.

Thoughts on Cherriots mission to increase diversity, equity and inclusion. The two contractor respondents indicated that Cherriots is on its way to achieving its mission but indicated that there were obstacles to doing so, such as updating its payment collection system. They also agreed that leaders of Cherriots prioritize diversity, equity and inclusion.

Bring their whole selves to work. Contractor respondents largely reported that they can bring their whole selves to work.

Other comments and suggestions. Contractor respondents reemphasized that having more community outreach would be helpful in helping Cherriots become a more equitable, inclusive and diverse organization.

[My vision is] very similar to what is currently in place. The customer service here at Cherriots is amazing and everyone is treated with respect.

Providing transportation in Salem & Keizer, accessible to all people for a reasonable fare.

From the time I have been here, everyone has been so welcoming, from bus drivers to customer service. It has been a pleasure to work here. Cherriots has a family/team aspect to it.

I have witnessed many individuals from different backgrounds all treated with respect and dignity.

I think more outreach into those communities that are harder to reach [would be helpful]. [For example], more outreach into schools, colleges, job fairs.

I believe Cherriots is on the right track. From my short time here, I have noticed a very diverse environment.

Leaders here at Cherriots are great. They all have had an open-door policy with me.

I think that bringing your whole self to work is; any outside obstacles don't stand in the way of completing your task as an employee.

[Having] more community outreach when we are all opened back up.

APPENDIX D. Analysis of Cherrlots Employee Focus Group

Keen Independent Research held a virtual focus group session with 15 Cherrlots leaders and managers on January 28, 2022, over Zoom. The focus group was facilitated by Annette Humm Keen of Keen Independent facilitated the discussions.

This appendix provides an analysis of the group discussion, and includes the following sections:

- Barriers related to equity and fairness in Cherrlots employment practices;
- Equity conditions for represented and non-represented Cherrlots workers;
- Successful DEI training and barriers to DEI training success;
- Cherrlots onboarding process;
- Retention and promotion at Cherrlots;
- Creating a culture of embracing differences; and
- Other thoughts or comments.

D. Employee Focus Group — Barriers to equity and fairness in Cherriots employment practices

Keen Independent first asked focus group participants what barriers there are to equity and fairness in Cherriots employment and workforce practices. Comments included:

Qualifications, Including Drug Testing

One focus group participant mentioned that qualifications, including specific shop knowledge, as well as obtaining a DOT medical card for getting a Commercial Driver's License, might be a barrier to potential applicants.

These barriers sometimes include drug testing requirements, which have come as a surprise to some applicants following cannabis legalization in Oregon and surrounding states.

Publishing Opportunities and Bridging Cultural Gaps

Another focus group participant focused on the need for Cherriots to move beyond traditional means of communicating Cherriots job opportunities to the public. This participant mentioned that Cherriots could improve in terms of presenting and distributing information in a culturally relevant manner.

[In] my division ... there are the obvious barriers. There's the ability to obtain a DOT medical card so you can get a Commercial Driver's License. There's also the ability, or desire ... to pass a drug test – even though it's legal, it's not legal for CDL holders ... and of course when you go into the shop there are obvious barriers there ... you have to have some knowledge of working on an engine, and the systems involved in a vehicle and that sort of thing You can't just walk in off the street and do [it] ... we have ... training programs and on-the-job training and so forth, but there are those initial steps that one must take in order to be qualified, so I guess I could even say being qualified is a barrier for some ... but if they read the job description thoroughly, and they're not just checking a box for unemployment, we're pretty clear about the minimum qualifications. – FG-01

As thorough as we have tried to be, [our systems] have followed what I would call a somewhat traditional model of publication [and] notification of opportunities and the application process and so forth. I sometimes wonder about how well we do in [terms of publishing] opportunities ... in a cultural and relevant manner to various groups, whether we're trying to bridge a language gap, a cultural difference ... It's very easy to feel like we are checking all the boxes, [for example,] we translate our things into Spanish because that's the most common other language spoken in this area ... but it goes beyond that ... Are there perception barriers that are being encountered [by] the people that we're trying to reach that either make that job seem like it's really not attainable or it's not a welcoming place? ... We need to ... step out of our process and look at it from a different perspective to really recognize where we need to make some changes. – FG-02

D. Employee Focus Group — Equity conditions for represented versus non-represented workers

Focus group participants were then asked if there are differences between represented (union) and non-represented (non-union) employees, in particular if there are differences in employment practices, and how welcoming the work environment feels.

Conditions for Union Versus Non-Union Workers

One focus group participant commented that there is a marked difference between represented and non-represented workers in terms of DEI.

Unions' Openness to DEI Ideas

Focus group participants provided varied perspectives regarding whether unions are open to or interested in DEI considerations.

Suggestions

One focus group participant provided suggestions for how Cherriots might encourage DEI practices in labor unions with which it negotiates. For example, the participant suggested explaining how DEI impacts various aspects of the job, as well as including both union and non-union workers in DEI trainings.

There is a very obvious difference [between union and non-union workers] in hiring practices and day-to-day ... It's very difficult because ... it just hasn't been a topic of conversation ... in my [many] years of working with teamsters in different unions ... it's not about [DEI], it's about seniority and seniority only, so there is a difference there in hiring practices ... we have our District policies, but there's a lot that's governed by that labor agreement ... yeah, there's a very distinct difference between represented and non-represented staff ... – FG-01

I think it will take a very long time to change ... [DEI] has not been a point of interest for labor unions that I've worked with. How we can do that is by selecting the right people and maybe the culture will change ... [but] who are the right people? – FG-01

[At a previous company,] ... we found that people were really susceptible to learning about [DEI] once they went to [an] initial training ... [and] got to hear about what [DEI is and] how it affects their jobs ... [When] it comes to union employees, they want to know how it affects their day-to-day ... of driving the bus, interacting with the customers. – FG-03

One of the things that I found successful was having a training that was not just limited to the union, but we brought in everyone ... District employees in a room with union employees, all asking questions about how they all interact with each other, using diversity, equity and inclusion. I think that was an important piece ... Yeah, absolutely [it would work for Cherriots] Find the right people to present the content in the right way Any time you can tie in how [DEI] works with the contract, how it makes their job more beneficial, how it provides that world-class service to our customers [and] to working with our coworkers ... that's when people go, 'Okay this makes sense to me ... this is how it applies to my day-to-day life.' – FG-03

D. Employee Focus Group — Successful DEI training and barriers to DEI training success

Keen Independent then asked focus group participants if, in their experience, there are types of DEI training that are less positive or are not as effective. Additionally, staff were asked what could get in the way of DEI training success.

Paths to Success

One participant commented that they have had previous success with small, in-person groups and remarked that DEI training is less successful when it takes place online. Another participant mentioned that over time, a culture of overall collaboration and engagement can be created, with DEI as a starting point for those changes.

Barriers

Some participants noted that DEI training and solutions might be negatively impacted by lack of knowledge surrounding the purpose of DEI efforts. Participants also remarked that approaching DEI as “checking a box” is ineffective.

The training that we [at my previous employer] found to be the most successful was classroom, in-person training, getting away from anything that is digital like trying to do Zoom trainings When we had people in the room ... it became much more interactive ... and honestly small groups. We tried to do a few big groups, and [no] one wants to talk. In the smaller groups ... people are willing to talk I allowed anyone to sign up ... then they have their peers in the room, and that actually [played] really strongly to our benefit – FG-03

I think that DEI will be a part of everything ... having a culture of feedback, a culture of collaboration, a culture of engagement, to name a few, but I think DEI is at the root of everything. – FG-06

I think ... here at Cherriots ... people don't necessarily understand what [DEI] means, or when they're hearing it from outside the organization ... in the news lately, mostly it's been kind of adversarial I think that's the reason we have to plan how we're going to roll it out ... so we all have common language and common understanding but also [to explain] why we're doing it – to make it a better workforce, to attract a more diverse body of applicants ... to make a stronger, more inclusive organization Right now ... [people] aren't really understanding fully why we're doing this and [what it means]. – FG-05.

I agree 100 percent, we can't approach this as though we're checking a box, it needs to become something that everyone is familiar with [and] everyone understands the methodology, the purpose, the goal. We're aiming towards becoming a high-performance organization and ... this is one component of that roadmap [to get there]. Once everyone has that full understanding, there's more likelihood that people will embrace it and move forward with it. – FG-06

D. Employee Focus Group — Successful DEI training and barriers to DEI training success

Unsuccessful Methods

Participants noted specific DEI training methods that they have found unsuccessful in the past. These included online training with no follow-up, as well as emphasizing regulations instead of and trying to truly include everyone in DEI efforts.

When I was at [a former employer] ... you had to watch these [DEI] videos ... [it] was pretty non-interactive ... just watching videos. It was more of a check-the-box thing As long as you watched it ... you had your training ... nothing was ever followed up with it, and you couldn't ever correlate to anything in the organization or the culture – FG-07

The areas where I've seen it really not be successful ... I'll use Title VI as an example. Title VI is specific to race, color and national origin. Well, if we draw the line there, then we have already excluded a significant number of people that fall outside of those three strict categories. When we talk about inclusion, all means all. [It means] everyone. – FG-02

D. Employee Focus Group — Cherriots onboarding process

Participants also provided thoughts on the onboarding process at Cherriots.

Positive Impacts of Onboarding

Numerous respondents remarked that Cherriots has a highly effective onboarding process that makes employees feel welcomed and appreciated from the beginning.

Ensure that all Employees Receive the Benefits of Thorough Onboarding

Participants indicated that existing employees moving to a new position within Cherriots might benefit from some of the onboarding processes given to new hires. One participant mentioned that a somewhat more flexible onboarding process, that could be adjusted based on the department, could be beneficial. Another remarked that it is crucial to ensure that everyone can feel welcomed by Cherriots onboarding.

Feedback has been extremely positive [regarding the onboarding process]. These are things that make [people] feel like we prepared for them and that we want them to be there ... [Our onboarding process] really has worked I think it is important to say, 'Welcome, we want you here from the very beginning [of employment].' – FG-04

Currently onboarding is happening primarily with the teams that the new hire is going to. I believe that onboarding should begin with HR ... I know that it will be a process that will endear new hires to the [agency]. – FG-06

That first week, the inclusion that a new employee feels, [they get] ... to know people, departments, break the ice It's nice to have that sit-down, face-to-face time – FG-03

One of the things that I think is important ... is that there's onboarding for external new hires and there's onboarding for ... internal hires I think that there's a distinction there ... because the internal folks already have an idea of what the culture is and what we do, but there's additional information and/or additional training of course that can be provided to those folks. – FG-07

[Del Webb] ... follows the same ... [onboarding process as] everybody else. I think [there need] to be some tweaks made to make it a little bit more customizable ... for each individualized department because we all have different needs, but the bulk of it is still pretty worthwhile – FG-11

My onboarding was very positive ... great place to work ... how do you translate that into everybody else feeling the same way that I do about it, becomes the question. – FG-15

D. Employee Focus Group — Retention and promotion at Cherriots

Keen Independent asked focus group participants how Cherriots retains employees or helps them move through the promotion process, including whether participants believe the Cherriots promotion process is done equitably and fairly. Common themes are presented here and on the following page.

Actively Engaging with Employees

Several focus group participants pointed out the need to actively engage with employees as a means of retaining them as well as helping them grow and contribute to the Cherriots organization. Additionally, one participant mentioned using metrics and performance reviews to ensure that leaders can identify how employees can grow.

As a manager ... it's my responsibility to do what I call 'the three E's': you educate, equip and empower them to grow, to do their job to the best of their ability, and then get them to stay within the organization ... it's really about engaging the person where they're at, not waiting for somebody to come to me and say, 'I'd really like to learn this new thing.' I want to seek them out and say, 'Hey would you be interested in this?' Genuine acknowledgement of effort and then helping expose opportunities if they don't find them themselves. – FG-01

I think it's really important to identify the difference between equality and [equity] ... equality has a place, maybe at the base of the pyramid, but then as you continue on with the onboarding process and the training process, you've got to look at now being equitable, meeting that person where they're at, and finding out what their strengths are and how that can apply to the company because that will build confidence, and then finding out where their areas of growth are, and supporting them in that role, and I think that will also [improve] retention for that employee. – FG-03

The personal touches that I get on a regular basis, the attention that I've had to my career path since I've been here, making sure that I've had opportunities to learn and to grow ... have been great, so trying to figure out how to make that available to everyone in the same way ... I think we're trying to It's tough, though, to take the time and have the ability to sit down with every one of your employees when there's so many people here in some of the departments – FG-15

[If you use performance reviews and metrics,] you can see where they can grow; that way no one ever feels stagnant ... so people continue to have chances to grow. – FG-03

D. Employee Focus Group — Retention and promotion at Cherriots

Building Confidence and a Sense of Belonging Among Cherriots Employees

Participants also mentioned that managers need to build their employees' confidence. One mentioned that employees whose first language is not English might have added difficulties building confidence and would benefit from additional encouragement and managerial awareness of the particular skills that they bring to the table.

Additionally, focus group participants mentioned the need for a strong sense of belonging within the organization, as well as making it clear to employees that they can reach out to HR or their respective managers regarding opportunities.

Lack of Traditional Career Tracks at Cherriots

One participant mentioned that due to Cherriots' small size, the organization does not have as many traditional career ladders as other, larger organizations. Sometimes an employee's only means of being promoted is to become a people manager, which might not be the right fit for every employee.

In regard to the opportunities for promotion or encouragement to stay with the job ... especially for people for who English may not be their first, primary language, is a lack of confidence because they don't have the same level of comfort with the English language, and yet they are tremendously talented and skilled employees It's [incumbent] upon us to reach across those perceived barriers and to connect with the individual for who they are. – FG-02

Belonging is so essential for our mental psyche and our physical health, and I have always felt since I started here ... that I belong I don't think onboarding should [ever] stop; I think it should continue on a person's journey here as a member of Team Cherriots. – FG-09

... there has been a culture shift I think people are feeling better these days about going to their managers and going, 'Hey, I'd really like to learn about [this topic]' or 'Are there other opportunities?' or 'I want to look at some development opportunities' [prior to] this culture shift ... I think there were individuals that, quite frankly, were just kind of waiting to be developed ... and perhaps those individuals didn't know that [they could] go talk to [their] manager ... [Now] I think the culture is such that [an employee] can go to HR and say [they're] interested in [development opportunities] ... – FG-12

We don't have a lot of career progression tracks ... where some of the bigger agencies will have, like, a Management Analyst I, II and II, Planner I, II and III ... so that there's a natural progression [here] to move up you [typically] become a manager of people and some people don't want to be a manager of people What do we do to progress them because they don't want to be a manager but they're going to bring more and more value [to Cherriots]? How do we deal with that? – FG-05

D. Employee Focus Group — Creating a culture of embracing differences

Keen Independent asked focus group participants for their suggestions regarding how Cherrits can encourage a culture of embracing differences.

Each Person Counts

Participants emphasized the importance of recognizing people for who they are as individuals and for what they personally bring to the Cherrits organization.

It's a delicate balance between celebrating people for who they are and the cultures that they bring and the diversity that they bring, but not focusing on them as, 'See, look, this is our ... fill-in-the-blank, whatever category; isn't this great, we've got diversity.' So it's that balance of making it a natural celebration of the beauty of it all coming together as a diverse group of people but not stigmatizing someone because we're going to put a label on them. – FG-02

Everyone counts and caring and learning about everyone is all equally important. – FG-08

D. Employee Focus Group — Other thoughts or comments

Virtual workshop participants were then asked to provide any other thoughts or comments regarding diversity, equity and inclusion at Cherrlots.

Leader Education is Key

Respondents remarked that educating leaders first regarding DEI will help prepare them for questions on the subject that may come from their employees.

Metrics

One focus group participant remarked that at a previous place of employment, setting goals, using metrics and following a strategy were all crucial to DEI efforts.

When you were talking about people embracing the whole topic [of DEI] I think education is key. I think ... if you start with leadership, that's helpful because [employees] are going to start asking questions and if [leaders] don't have the right answers or know where to [direct them] to get the right answers then that's going to be frustrating So I think the more education we can do within [the leadership] group and the more that we can talk about it in normal, general conversations, not because that's the topic of the meeting, but just to bring it up in casual conversation, I think that it'll open up people's minds and people will start asking more questions once they understand the topic a little bit better. – FG-13

We can all do the other training about diversity and inclusion and equity ... but if we don't have a certain set target [for] results, it means nothing So what we [at a different organization] did was ask ... how do we plan strategically in terms of the overall objective to have a cultural shift? For example ... if you [look at] accounting and finance, you see less of a diverse workforce If you go to engineering [or] health services, you see more of a diversified [workforce], so we had to ... strategically set up targets in specific positions to go where minorities are not being fully represented, to go for job fairs, send out flyers, and tell them, ... 'this is a very good place to work' and then during recruitment ... [add] one key line there, 'Women and minorities are encouraged to apply.' That was the key. – FG-14

APPENDIX E. Analysis of External Stakeholder Virtual Workshop

Cherriots invited over 100 elected officials, community leaders and other external stakeholders to participate in a virtual workshop in December 2021. Virtual workshop participants were asked to respond to a series of open-ended questions regarding diversity, equity and inclusion. Of those invited, 18 people participated.

Components of the external stakeholder virtual workshop included the following:

- Elements of an equitable public transit system;
- Whether Cherriots fits respondents' vision of an equitable public transit system;
- Reasons for responses regarding whether Cherriots fits respondents' vision of an equitable and inclusive public transit system;
- How Cherriots can best communicate to the public its objective of incorporating diversity, equity and inclusion across agency activities;
- Cherriots' relationship with the Salem-Keizer community;
- What Cherriots can do to improve and strengthen its relationship with the community;
- Whether individuals from historically marginalized communities are equitably served by Cherriots;
- Why participants do (or do not) believe that individuals from historically marginalized communities are equitably served by Cherriots;
- What can be done about Cherriots' inequitable service of historically marginalized communities (if applicable);
- How Cherriots can ensure that its equity initiatives are inclusive of all individuals including those in hard-to-reach communities;
- Suggestions for Cherriots to become a more just, inclusive and diverse organization;
- Potential barriers to achieving Cherriots' objective;
- Whether respondents consider themselves an elected official or a member of a community organization or government agency;
- Organizations represented among the virtual workshop respondents;
- How Cherriots could more effectively reach or support local groups or communities;
- Whether Cherriots should participate in law-making efforts related to transportation and mobility;
- Why Cherriots should or should not participate in law-making efforts;
- Additional input regarding Cherriots' objective of incorporating equity across agency activities; and
- Demographic information.

E. Analysis of Stakeholder Virtual Workshop — Whether Cherrlots provides equitable service

Elements of an Equitable Public Transit System

Virtual workshop participants were asked to describe their vision of an equitable public transit system for a community like Salem-Keizer. Responses are summarized to the right and below.

Accessibility. Several participants remarked that an equitable public transit system must be:

- Accessible, including ADA accessibility;
- Provide solutions for rural residents and other areas with lower cost of living; and
- Provide options for people experiencing homelessness.

Safety/comfort. Some participants reported that safety and comfort are important to public transit equity.

Some mentioned lighting and shelters at bus stops along with comfortable buses.

Frequency. Other workshop participants remarked that frequency of service is a key component of equity. Few mentioned that service should be offered seven days a week or that service should be extended earlier or later in the day.

Other comments. Respondents mentioned other factors, such as providing more service to areas with more demand and treating everyone equally unless their behavior requires something different.

Geographic equity (solutions for more rural residents to have options for work and medical transportation).

Allow connectivity to nearby towns where the cost of living is less.

Well-lit bus stops, covered bus stops.

Shelters for bad weather.

It operates longer hours (earlier in the morning and later at night) and is a 7 day a week service.

Increase frequency of buses.

Routes with most demand, get more service

... it's an organization that treats everyone exactly the same until a person's behavior dictates differently.

E. Analysis of Stakeholder Virtual Workshop — Whether Cherrriots provides equitable service

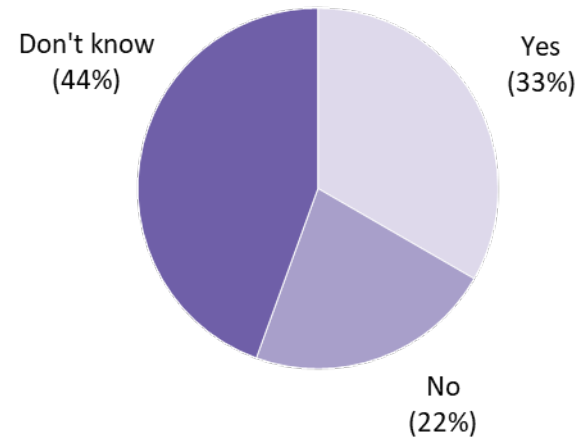
Whether Cherrriots Fits Respondents' Vision of an Equitable Public Transit System

Virtual workshop participants were then asked if Cherrriots fits their personal vision of an equitable transit system. About one-third of participants reported that Cherrriots does fit that vision.

The figure on the right presents results.

About one-third of the respondents that indicated “No” or “Don’t know” to this question also identified as a minority.

E-1. Respondents' opinion on whether Cherrriots fits their vision of an equitable public transit system, 2021



Source: Keen Independent Research Cherrriots External Survey, Dec. 2021–Jan. 2022.

E. Analysis of Stakeholder Virtual Workshop — Whether Cherriotics provides equitable service

Why Cherriotics Fits (or Does Not Fit) Respondents' Vision of an Equitable and Inclusive Public Transit System

As a continuation of the previous question, participants were asked why Cherriotics does (or does not) fit their vision of an equitable and inclusive public transit system. Responses are summarized below and presented to the right.

Participants who responded “yes”. Stakeholders said that Cherriotics fits their visions of an equitable and inclusive public transit system due to:

- Friendliness of bus drivers;
- Anyone who wants to ride a bus can pay the fare and ride; and
- Cherriotics' flexible and accommodating environment.

Participants who responded that Cherriotics does not meet their vision of equitable and inclusive public transit. Stakeholders who responded negatively to this question cited gaps in service, as well as a perception that Cherriotics does not assist people with obtaining emergency mental health services. Some also noted that Cherriotics should use smaller and more efficient vehicles in neighborhoods.

Flexible and accommodating.

Bus drivers are friendly.

If everyone that wants to ride a bus can pay the fare and do so, we have an equitable system.

It would be better to have smaller more efficient vehicles going into neighborhoods making it more convenient for riders.

Limited and poor services, does not reach all places; infrequent.

Cherriotics seems geared to the lower income and people with disabilities. It is not geared to pick up people in distress and take them to a mental or drug treatment facility.

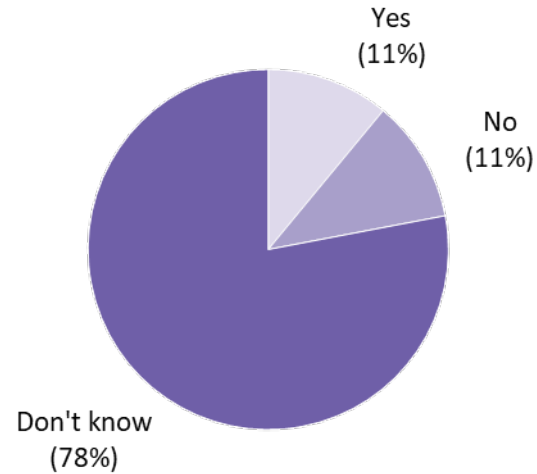
E. Analysis of Stakeholder Virtual Workshop — Whether Cherrriots provides equitable service

Whether Individuals from Historically Marginalized Communities Are Equitably Served by Cherrriots

Virtual workshop participants were asked if Cherrriots equitably serves individuals from historically marginalized communities.

More than three-quarters of respondents reported not knowing whether Cherrriots does this, as shown in the graphic on the right.

E-2. Respondents' opinion on whether individuals from historically marginalized communities are equitably served by Cherrriots, 2021



Source: Keen Independent Research Cherrriots External Survey, Dec. 2021–Jan. 2022.

E. Analysis of Stakeholder Virtual Workshop — Whether Cherriots provides equitable service

Why Participants Do (or Do Not) Believe that Cherriots Equitably Serves Individuals From Historically Marginalized Communities

As a follow-up to the previous question, participants were asked why they believe (or do not believe) that historically marginalized communities are equitably served by Cherriots. Responses are presented to the right and summarized below.

“Don’t know” responses. For respondents who reported not knowing whether Cherriots equitably serves individuals from historically marginalized communities, responses varied.

- Some remarked that they would need more data to answer this question, and one mentioned that buses mostly contain homeless people.
- Another participant remarked that people have to fit their lives to the bus schedule rather than the other way around.

Other comments. Other respondents provided varied ideas, including bus area coverage and the need for emergency mental health and substance issues services.

What Can Be Done About Cherriots’ Inequitable Service of Historically Marginalized Communities

Participants who responded that historically marginalized populations are not equitably served by Cherriots were then asked what can be done to address inequitable service. One workshop participant answered this question (shown below).

Request funding for a treatment facility to take people to in distress from the State and the City council as this would be similar to what Eugene has.

This has to be identified in the data.

It appears that community has to work around the bus schedule as opposed to bus services around the needs of the community!

Personally, my bus ride experiences have not seen ethnically diverse population on the bus. Mostly homeless or people near to the streets.

My guess is you'll find the "marginalized communities" represent a very high percentage of the community Cherriots serves.

It does not provide transportation in an emergency situation like a mental break down including drug and alcohol issue

Access to all parts of our community via bus lines.

E. Analysis of Stakeholder Virtual Workshop — Relationship with the community

How Cherrriots Can Best Communicate to the Public its Objective of Incorporating Diversity, Equity and Inclusion Across Agency Activities

Workshop participants were then asked for suggestions regarding how Cherrriots might best communicate its DEI objectives to the public. Some respondents remarked that they think Cherrriots is already doing well in this regard or is moving in the right direction. Participants' other suggestions are presented to the right and are as follows.

Actions and data. Nearly one-half of virtual workshop participants remarked that Cherrriots should let results speak for themselves. For example, one respondent commented that Cherrriots should just focus on services for people who need them most, and another commented that talking points are not enough.

Specific methods of sharing Cherrriots' message. Some participants recommended specific ways that Cherrriots could inform the public of its DEI objectives. For example, several respondents mentioned that ads on the side of buses could spread Cherrriots' message. Others suggested ideas such as posters at non-profit organizations, flyers in neighborhoods and digital efforts such as on the Cherrriots website and social media.

Representation. Some virtual workshop respondents commented on community representation at Cherrriots. For example, one participant suggested that employees should be diverse and representative of the community, and another mentioned that demonstrating that the Board represents the community and uses public transit will garner trust between Cherrriots and the community.

Intentional increase in services, frequency.

It can be best communicated by actions, not words or press releases.

Needs to be more than talking points/trainings. Proof is in the data.

Provide an efficient, clean, safe service and the rest will work itself out.

Just focus on service for people who most need it.

The sides of the busses. Social media.

Advertising via posters to be set up at the windows of each nonprofit agency.

Hire diverse people ... employees should represent community.

If more of the community knew the board presented much like the community, and at least some of its members expressed experiences as riders, they might feel more empowered to trust DEI processes, and participate moving forward.

E. Analysis of Stakeholder Virtual Workshop — Relationship with the community

Cherriots' Relationship with the Salem-Keizer Community

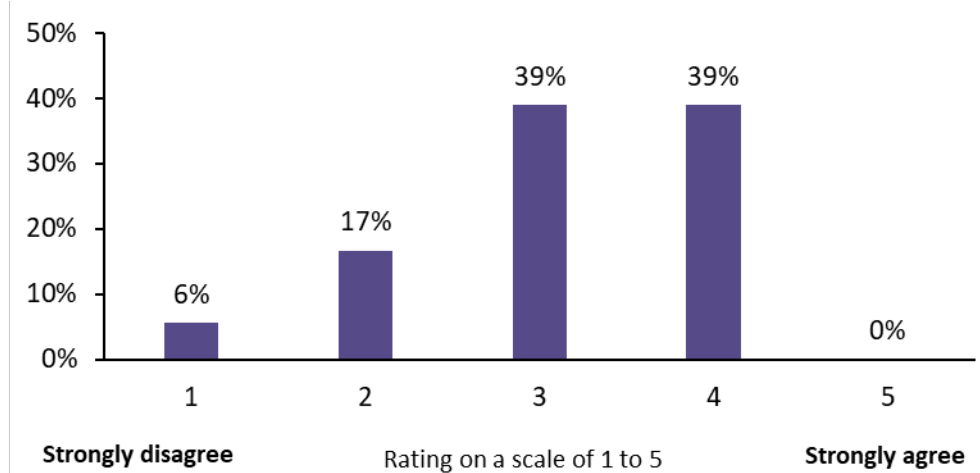
Workshop participants were asked, “Where 1 is very poor and 5 is very good, how would you describe Cherriots’ relationship with the Salem-Keizer community?”

About 80 percent of those surveyed rated this relationship as a three or four out of five, and only 6 percent gave the relationship the lowest rating possible (1). Additionally, three-fourths of the respondents who rated this relationship as a two or below belonged to a minority group.

No respondents rated the relationship as a five out of five.

Response distribution is presented in the figure on the right.

E-3. Respondents’ opinion on Cherriots’ relationship with the Salem-Keizer community, 2021



Source: Keen Independent Research Cherriots External Survey, Dec. 2021–Jan. 2022.

E. Analysis of Stakeholder Virtual Workshop — Relationship with the community

What Cherriots Can Do to Improve and Strengthen its Relationship with the Community

Participants were then asked how Cherriots can improve and strengthen its relationship with the Salem-Keizer community. The following themes emerged.

Increased service or visibility. Respondents recommended that Cherriots enhance its service offerings through higher frequency and accessibility and expanded service areas.

Others suggested that Cherriots needs to increase its visibility or rebuild its reputation following many years when Cherriots was perceived as lacking regular service.

Community outreach. Some participants suggested that Cherriots perform community outreach to identify needs and receive feedback.

More visibility.

The relationship here [in Dallas] would largely involve more bus stops.

... for many years the Cherriots brand was 'tarnished' by lack of regular service (and the broader, cultural impressions and stigmas against mass-transit). While Cherriots provides many more services than the general public is aware (making its true relationship better than its brand), until that brand improves, ridership is limited, and thus, the relationship is limited.

Seek input from different communities, workers, students and different parts of our communities.

Maybe visit community churches, social media for feedback.

E. Analysis of Stakeholder Virtual Workshop — Relationship with the community

How Cherriots Can Ensure That Its Equity Initiatives Are Inclusive of All Individuals Including Those In Hard-to-Reach Communities

Participants were then asked how to better ensure that Cherriots equity initiatives extend to hard-to-reach communities. Respondents' specific ideas are presented to the right, and common themes are summarized below.

Outreach. About 60 percent of respondents suggested inclusion through outreach practices, including requesting community feedback, bilingual communication and community-specific focus groups.

Other recommendations. Respondents also provided other suggestions, such as hiring additional staff to assist those experiencing homelessness and to ensure riders from hard-to-reach communities feel welcome; increased funding for these initiatives; and tracking ridership.

Potentially, add staffing for 'partnerships', 'outreach', or 'development programming.'

Reach out to places of worship, workplace, organizations, seek feedback in language, radio and news and social media.

Bi-lingual communication.

have you conducted focus groups? surveys won't help much. recommend asking the community themselves.

They would need funding for expansion of this type of service.

Maybe offer more bus ride support for these communities. Offer staff to ride with them, to help them feel welcome.

Keep track of ridership.

Help the homeless people get to their agencies and back.

E. Analysis of Stakeholder Virtual Workshop — Becoming more just, inclusive, diverse organization

Suggestions for Cherrlots to Become a More Just, Inclusive and Diverse Organization

External virtual workshop participants were then asked how Cherrlots could become a more just, inclusive and diverse organization. Common themes are presented to the right and below.

Optimizing service. Virtual workshop participants suggested that Cherrlots work to optimize services to ensure to address actual needs.

Hiring. Some respondents remarked that hiring is crucial to this process.

Other thoughts. Some workshop respondents suggested other ideas, including multi-lingual materials, advocating for high occupancy traffic lanes and providing employees with training so they can be better contributors to the community.

Improving bus lines to optimize riders.

Find out the gaps and needs before planning services.

Concentrate on those areas where transportation is a challenge – not only where they live but also where the larger employers are located.

Hire and promote the best.

Multi-lingual everything!

... consider advocating that any additional lanes are exclusively for mass-transit/carpooling. While this initially benefits a shared global environment and fits under larger target 50 goals (which is DEI in a macro scale), it builds in long-term promotions of ridership that affords Cherrlots mandates for specific community programming.

Offer training for employees. help them build their skills to be bigger contributors of community. Invest in them and good things will happen.

E. Analysis of Stakeholder Virtual Workshop — Becoming more just, inclusive, diverse organization

Potential Barriers to Achieving Cherriots' Objective

Virtual workshop participants were then asked what factors might present barriers to Cherriots achieving its objective of becoming a more just, inclusive and diverse organization. Common themes are presented on the right and are as follows.

Personal and political goals. Some respondents remarked that over-politicizing issues or catering to personal interests could create a barrier to Cherriots achieving its objective as a public transit organization.

Assumptions and inflexibility. Other workshop respondents indicated that inflexible ideas or making assumptions about what is needed rather than asking communities could become barriers to Cherriots' objectives.

Political commitments to too many equity groups - be all things to everyone leaves you effective to virtually no one.

Trying to please people that don't care about running a good bus system.

If we assume what communities need as opposed what actually is needed.

[lack of] open dialogue

inflexible strategic plan

E. Analysis of Stakeholder Virtual Workshop — Communications

How Cherrlots Can Best Communicate to the Public its Objective of Incorporating Diversity, Equity and Inclusion Across Agency Activities

Workshop participants were then asked for suggestions regarding how Cherrlots might best communicate its diversity, equity and inclusion objectives to the public. Some respondents remarked that they think Cherrlots is already doing well in this regard, or is moving in the right direction. Participants' suggestions are presented to the right and are as follows.

Actions and data. Nearly one-half of virtual workshop participants remarked that Cherrlots should let results speak for themselves. For example, one respondent commented that talking points are not enough and action is instead the best communication tool.

Specific methods of sharing Cherrlots' message. Some participants recommended specific ways that Cherrlots could inform the public of its DEI objectives. For example, several respondents mentioned that ads on the side of buses could spread Cherrlots' message. Others suggested ideas such as posters at non-profit organizations, flyers in neighborhoods and digital efforts such as the Cherrlots website and social media.

Representation. Some virtual workshop respondents commented on community representation at Cherrlots.

Intentional increase in services, frequency.

It can be best communicated by actions, not words or press releases.

Needs to be more than talking points/trainings. Proof is in the data.

Provide an efficient, clean, safe service and the rest will work itself out.

Just focus on service for people who most need it.

The sides of the busses. Social media.

Advertising via posters to be set up at the windows of each nonprofit agency.

Hire diverse people ... employees should represent community.

If more of the community knew the board presented much like the community, and at least some of its members expressed experiences as riders, they might feel more empowered to trust DEI processes, and participate moving forward.

E. Analysis of Stakeholder Virtual Workshop — Communications

How Cherriots Could More Effectively Reach or Support Local Groups or Communities

Continuing from the previous question, external virtual workshop participants were asked how Cherriots could expand its reach or better support the respondents' respective groups or communities. Some workshop respondents remarked that Cherriots already does a good job with outreach, while others provided the suggestions presented to the right (and summarized below).

Direct outreach. Some participants provided specific suggestions for direct outreach opportunities or methods, such as attending neighborhood association meetings and collaborating with school districts. One respondent remarked that Cherriots needs to actively listen to the communities it serves.

Providing high-quality, optimized service. Some respondents remarked that Cherriots can best reach and support groups by providing optimized services, including smaller buses for lower ridership areas, more bus stops and pulse frequency and increasing its coordination with community assistance programs.

Other. Respondents provided other suggestions as well, such as hiring and training more people of color.

Cherriots does a good job reaching out to people.

My experience with Cherriots is, they don't need anything from anyone and are not willing to listen so that's where they need to start. Actually listening to the communities they serve, followed by action would go a long way.

Collaboration with school district to increase the reach for our students

Attend neighborhood meetings in Salem and surrounding areas

Create routes that are time sensitive for employment hours.

More bus stops in the community. I like [Cherriots'] new Sunday service.

Continuing/increasing its coordination between community-assistance programs and bus stops.

Hire more people of color and train them.

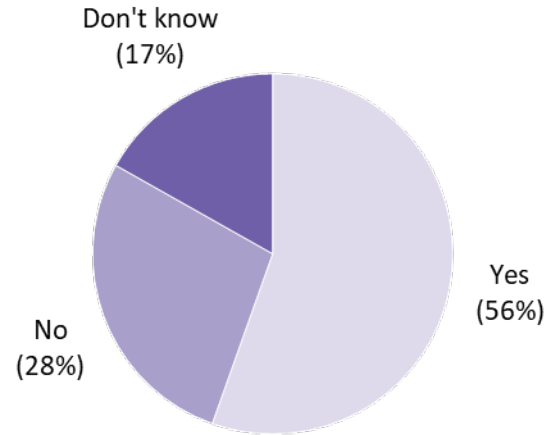
E. Analysis of Stakeholder Virtual Workshop — Communications

Whether Cherrriots Should Participate in Law-Making Efforts Related to Transportation and Mobility

The survey then asked whether participants think Cherrriots should participate in state and local law-making efforts related to transportation and mobility, such as advocating for the construction of bike lanes.

More than half of respondents selected “yes.” The figure on the right presents these results.

E-4. Respondents’ opinion on whether Cherrriots should participate in law-making efforts related to transportation and mobility, 2021



Source: Keen Independent Research Cherrriots External Survey, Dec. 2021–Jan. 2022.

E. Analysis of Stakeholder Virtual Workshop — Communications

Why Cherriots Should (or Should Not) Participate in Law-Making Efforts

Respondents were then asked to explain their reasoning regarding whether Cherriots should advocate for transportation and mobility legislation. Responses are summarized below and presented to the right.

Cherriots' voice is important to transit legislation. Some respondents remarked that legislative issues regarding transit impact Cherriots' operations and so Cherriots should be involved in them.

Resources allocated incorrectly. Some participants indicated that participating in legislative efforts regarding transit would spread Cherriots' resources more thinly. Some mentioned staffing and time constraints, and one mentioned that this would expand Cherriots' mission beyond its current scope. Another respondent remarked that it would not be appropriate to use public funds for this type of political effort.

Good for the community and economy. Other workshop respondents commented that Cherriots can assist with legislation that will provide better transit solutions that could create a positive impact on the local community and economy.

Cherriots is an important voice at the table when it comes to planning community transportation methodologies

Cherriots is a transportation organization and laws affecting how transit operates is an important area for Cherriots to be engaged.

Being publicly funded it would be inappropriate for Cherriots to use those funds for promoting a political stance.

Don't get involved in other things. Just what we asked for which are more important for the whole community in Salem. Please don't spread yourself so thin.

Mission creep. Deal with your part of the transportation and mobility continuum where you are directly impacted. It's too easy to be pulled into things beyond your scope and then decide you have to hire more people to focus on the things outside your scope. It becomes a money drain.

Shaping policy will result in more responsive transportation solutions for area within and outside of the District.

... many different transportation options allow a community to be healthy.

E. Analysis of Stakeholder Virtual Workshop — Characteristics of external stakeholder participants

Whether an Elected Official or a Member of a Community Organization or Government Agency

Virtual workshop participants were asked whether they would describe themselves as a member of a community support organization, ethnic/cultural organization, business organization, government agency or an elected official.

All participants responded, “yes,” to this question.

Organizations Represented

As a follow up to the previous question, participants were asked what organization or community they represent. Responses are summarized below and presented on the right.

Business community. Some virtual workshop respondents indicated that they represent the business community, including the small business community.

County, government or school board. Other participants remarked that they belong to a specific community, county, government entity or school board.

Neighborhood or neighborhood association. Some workshop participants commented that they represented a specific neighborhood, including neighborhood associations.

Non-profit organization. Some respondents reported that they represent a non-profit or community support organization in the Salem-Keizer area.

Other. Other respondents indicated that they represent groups such as low-income populations, seniors, persons with disabilities or racial or ethnic groups.

Small business community

Business Organization

Dallas, a community of 17,000.

School board directors

All of Polk County

Northeast Neighborhood Association

Northgate neighborhood

Salem Free Clinics, Westminster Presbyterian Church, Morningside Neighborhood Association, City committees

Salem For Refugees.

Seniors, people with disabilities

Low-income neighbors in need

Latino/a/x, Mexican, Mexican-American, American

E. Analysis of Stakeholder Virtual Workshop — Characteristics of external stakeholder participants

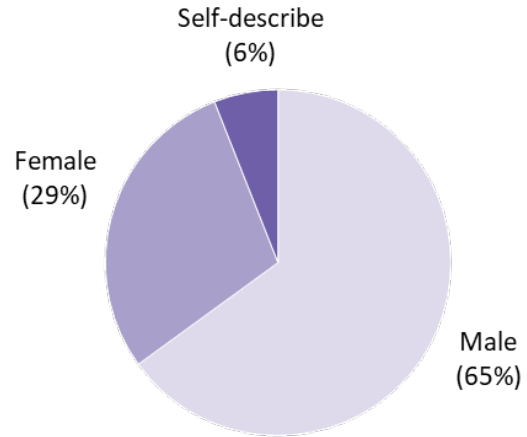
Demographics of Virtual Workshop Participants

At the end of the survey, virtual workshop participants were asked to provide demographic information.

Gender. Most of the respondents who completed this survey were male. The figure on the top-right presents these results.

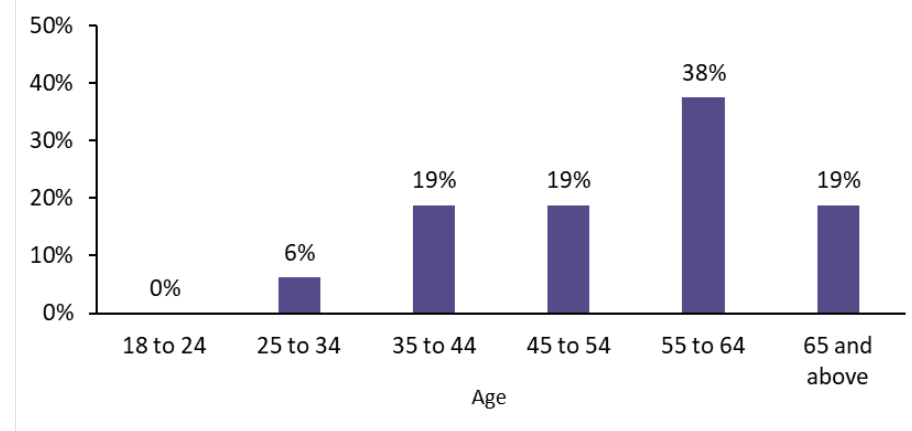
Age group. A majority of respondents were 55 years old or older. The figure on the bottom-right presents these results.

E-5. Respondent gender distribution, 2021



Source: Keen Independent Research Cherriots External Survey, Dec. 2021–Jan. 2022.

E-6. Respondent age distribution, 2021



Source: Keen Independent Research Cherriots External Survey, Dec. 2021–Jan. 2022.

E. Analysis of Stakeholder Virtual Workshop — Characteristics of external stakeholder participants

Race and ethnicity. Almost three-fifths of respondents were white.

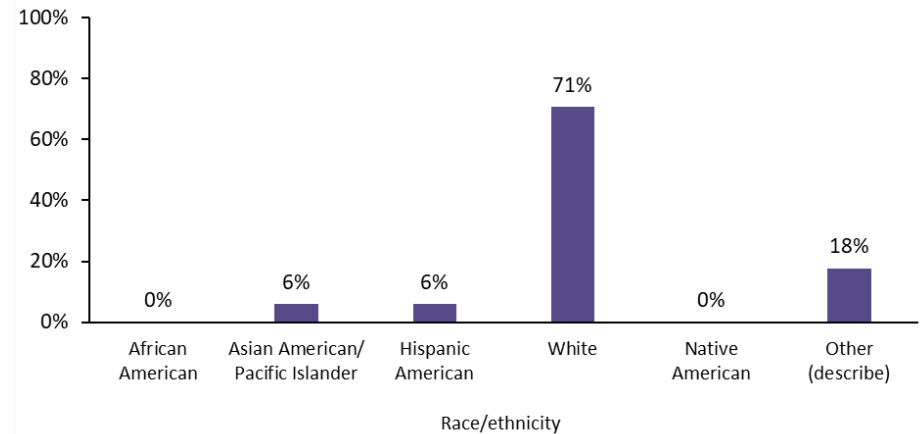
Approximately 18 percent of respondents also selected “other” and then self-described their race/ethnicity. Many of these participants described themselves as biracial or of mixed race.

The figure on the top-right presents these results.

Highest level of education. More than two out of three respondents reported that they had at least a college degree.

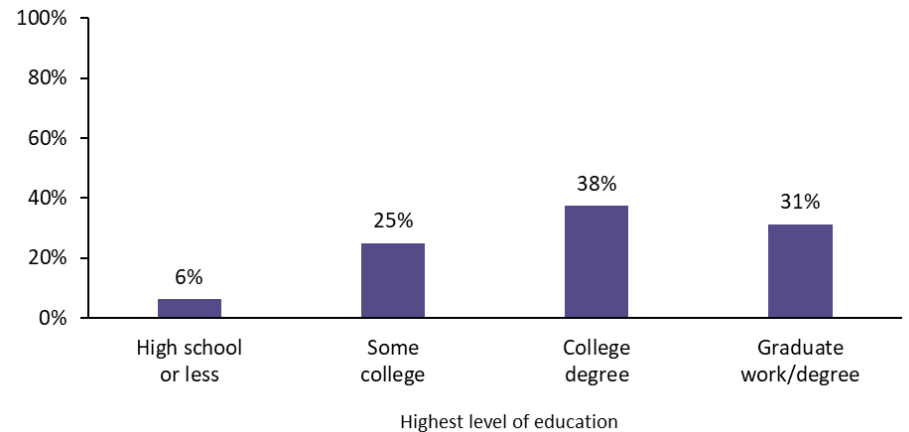
The figure on the bottom-right presents these results.

E-7. Respondent race and ethnicity distribution, 2021



Source: Keen Independent Research Cherriots External Survey, Dec. 2021–Jan. 2022.

E-8. Respondent education attainment distribution, 2021



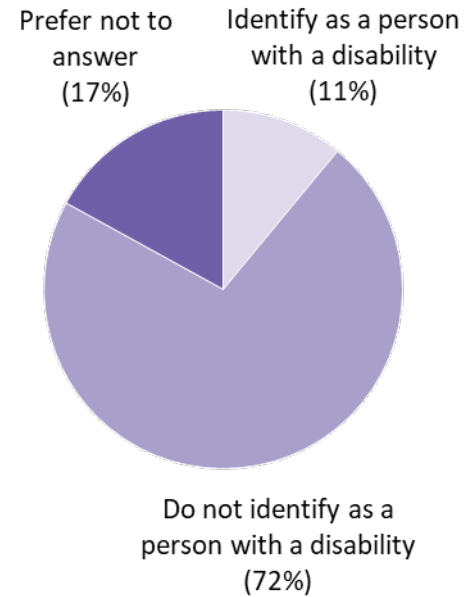
Source: Keen Independent Research Cherriots External Survey, Dec. 2021–Jan. 2022.

E. Analysis of Stakeholder Virtual Workshop — Characteristics of external stakeholder participants

Persons with disabilities. Respondents were asked if they identified as persons with disabilities. About one out of 10 said they did.

The figure to the right presents these results.

E-9. Distribution of respondents who identified as persons with a disability, 2021

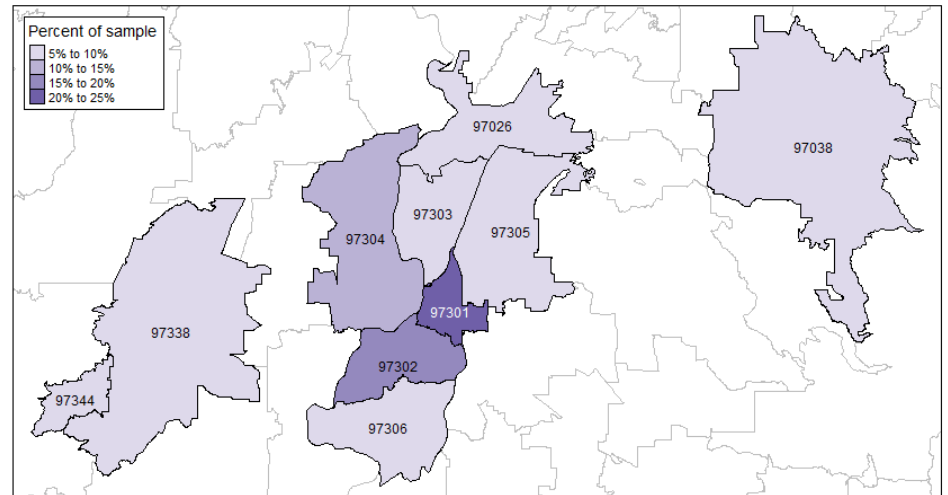


Source: Keen Independent Research Cherriots External Survey, Dec. 2021–Jan. 2022.

E. Analysis of Stakeholder Virtual Workshop — Characteristics of external stakeholder participants

ZIP codes represented. Workshop participants were also asked what ZIP codes they reside in. More than one-half were from ZIP code 97301, 97302 and 97304 and the balance were from other parts of the service area.

E-10. Distribution of respondents' zip codes, 2021



Source: Keen Independent Research Cherrits External Survey, Dec. 2021–Jan. 2022.

APPENDIX F. Analysis of Cherriots Rider Virtual Workshop

In December 2021, Cherriots staff asked a cross-section of its riders to answer questions about the organization through a virtual workshop survey (hard copy and online).¹ Keen Independent analyzed responses from the 219 Cherriots riders who provided input. A Spanish language workshop instrument was also provided.

Workshop items include riders' perceptions of Cherriots' performance regarding equity and inclusion, its relationship with the Salem-Keizer community and rider demographic information.

This analysis of the abbreviated external virtual workshop includes the following sections:

- Whether Cherriots fits respondents' vision of an equitable public transit system;
- Cherriots' relationship with the Salem-Keizer community;
- Whether individuals from historically marginalized communities are equitably served by Cherriots;
- Suggestions for Cherriots to become a more just, inclusive and diverse organization; and
- Demographics of virtual workshop participants.

¹ Most respondents completed workshops via hard copies.

F. Analysis of Cherriots Rider Virtual Workshop — Whether Cherriots provides equitable service

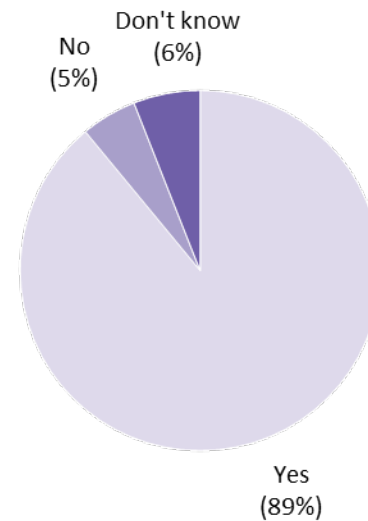
Whether Cherriots Fits Respondents' Vision of an Equitable Public Transit System

When virtual workshop participants were asked if Cherriots fits their personal vision of an equitable transit system, nearly 9 out of 10 respondents said “yes.”

The figure on the right presents these results.

People of color participating in the virtual workshop were somewhat more likely to respond “No” or “Don’t know” to this question.

F-1. Respondents' opinion on whether Cherriots fits their vision of an equitable public transit system, 2021



Source: Keen Independent Research Cherriots Rider Survey, Dec. 2021–Jan. 2022.

F. Analysis of Cherriots Rider Virtual Workshop — Whether Cherriots provides equitable service

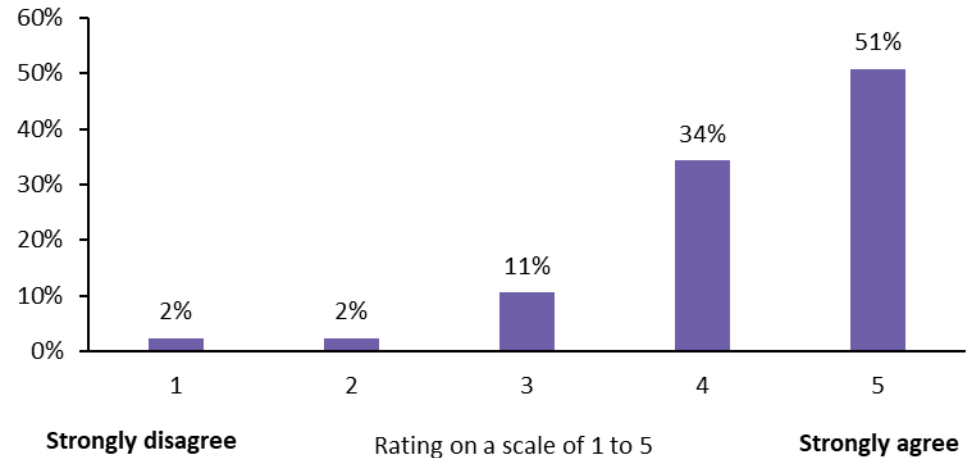
Cherriots' Relationship with the Salem-Keizer Community

Workshop participants were asked, “Where 1 is very poor and 5 is very good, how would you describe Cherriots’ relationship with the Salem-Keizer community?”

About 85 percent of those surveyed reported that Cherriots’ relationship with the Salem-Keizer community is good (response 4 or 5), and 11 percent selected a neutral response (3). Response distribution is presented in the figure on the right.

Only 4 percent of respondents reported disagreeing with the statement (response 1 or 2). Some of those respondents were people of color and/or non-Hispanic whites.

F-2. Respondents’ opinion on Cherriots’ relationship with the Salem-Keizer community, 2021



Source: Keen Independent Research Cherriots Rider Survey, Dec. 2021–Jan. 2022.

F. Analysis of Cherriots Rider Virtual Workshop — Rider suggestions for improvement

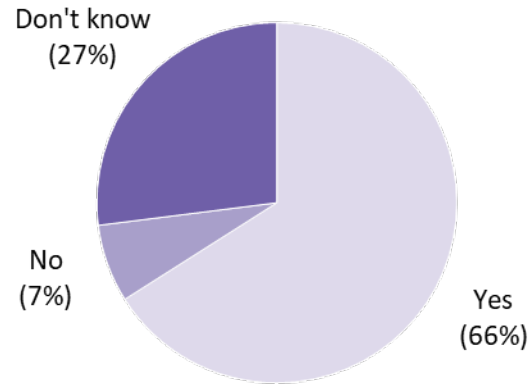
Whether Individuals from Historically Marginalized Communities Are Equitably Served by Cherriots

Virtual workshop participants were asked if Cherriots equitably serves individuals from historically marginalized communities.

Two thirds of riders responded “yes” and only 7 percent said “no.” Other riders indicated that they didn’t know.

The figure on the right presents these results.

F-3. Respondents’ opinion on whether individuals from historically marginalized communities are equitably served by Cherriots, 2021



Source: Keen Independent Research Cherriots Rider Survey, Dec. 2021–Jan. 2022.

F. Analysis of Cherriots Rider Virtual Workshop — Rider suggestions for improvement

Suggestions for Cherriots to Become a More Just, Inclusive and Diverse Organization

External virtual workshop participants were asked to provide any additional input regarding equity and inclusion at Cherriots.

Keen Independent categorized open-ended responses according to their sentiment (positive, negative and neutral) and theme (e.g., service hours and areas). The following themes were identified as the most prevalent in respondent feedback.

Diversity and inclusion. About 25 percent of comments were related to diversity and inclusion, 75 percent of which relayed positive or neutral feedback. Comments of this type are included to the top-right.

Expansion of service areas and hours. About one third of comments were related to Cherriots service hours and areas, most of which were neutral recommendations regarding expansion of services on weekends and in rural areas. Feedback on this topic are to the middle-right.

Pricing and accessibility. Some survey respondents expressed concern that fare pricing might exclude financially vulnerable populations that rely on public transit, such as students and the homeless. Examples of a comment on this type is shown to the bottom-right.

I feel that to some degree they try to be equitable. But some of the drivers are rude and difficult to everyone and especially the marginalized.

I was once banned from this service because a black person who looks like me violated the rules.

They do a great job serving diverse communities.

Some neighborhoods do not seem to be well served (frequency, etc.) by Cherriots.

All routes need more service.

Probably making cautious stops etc. more accessible and bus operating every day of the week.

The homeless can't afford \$4 for a day pass.

F. Analysis of Cherriots Rider Virtual Workshop — Characteristics of rider participants

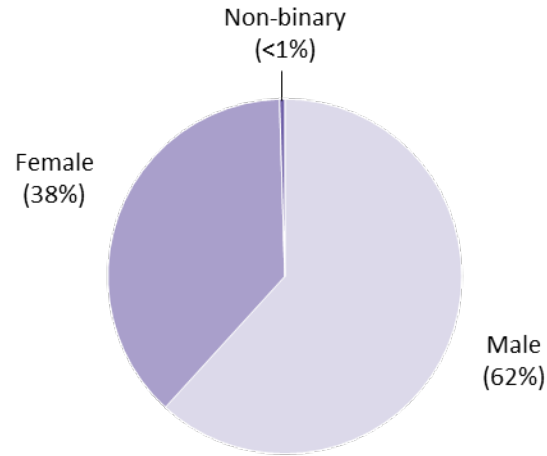
Demographics of Virtual Workshop Participants

At the end of the survey, virtual workshop participants were asked to provide demographic information. These results are presented below and on the following page.

Gender. Most of the respondents who completed this survey were male. The figure on the top-right presents these results.

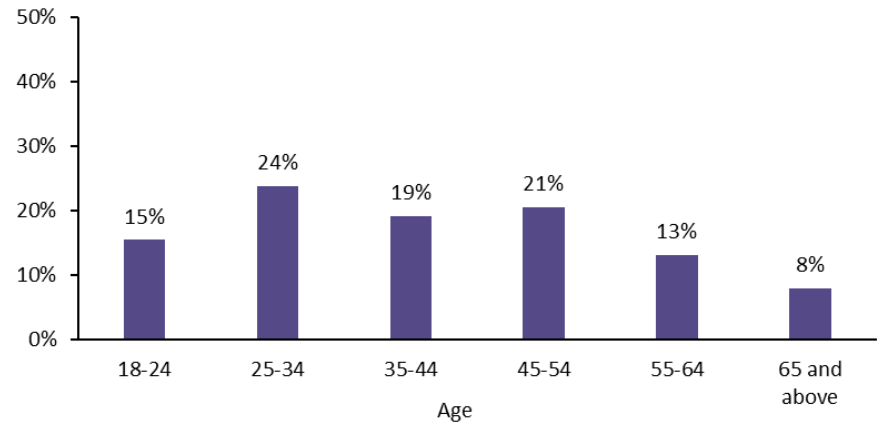
Age group. A majority of respondents were between the ages of 25 and 54. The figure on the bottom-right presents these results.

F-4. Respondent gender distribution, 2021



Source: Keen Independent Research Cherriots Rider Survey, Dec. 2021–Jan. 2022.

F-5. Respondent age distribution, 2021



Source: Keen Independent Research Cherriots Rider Survey, Dec. 2021–Jan. 2022.

F. Analysis of Cherriots Rider Virtual Workshop — Characteristics of rider participants

Race and ethnicity. About three-fifths of respondents were white.

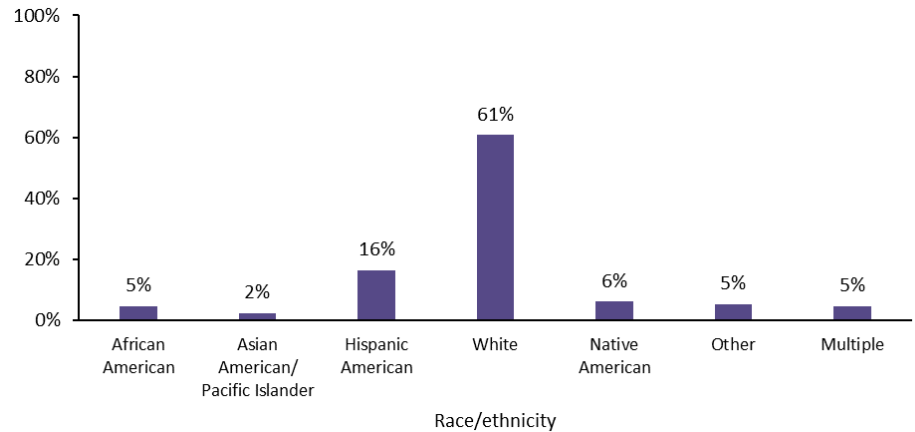
Approximately 5 percent of respondents also selected “other” and then self-described their race/ethnicity. Another 5 percent of participants described themselves as biracial or of mixed race.

The figure on the top-right presents these results.

Highest level of education. One out of five respondents reported that they had at least a college degree.

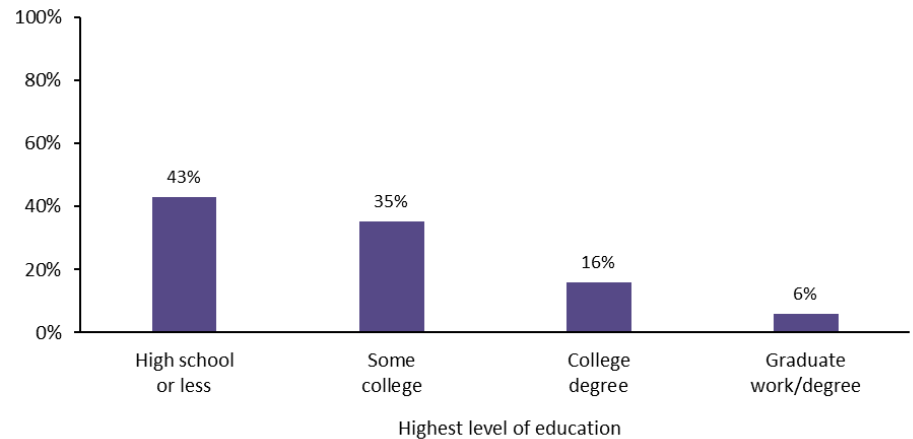
The figure on the bottom-right presents these results.

F-6. Respondent race and ethnicity distribution, 2021



Source: Keen Independent Research Cherriots Rider Survey, Dec. 2021–Jan. 2022.

F-7. Respondent education attainment distribution, 2021



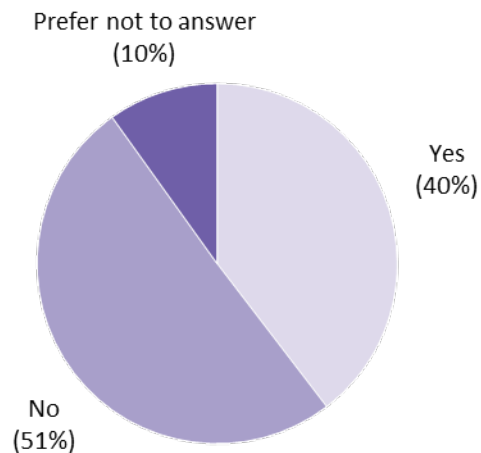
Source: Keen Independent Research Cherriots Rider Survey, Dec. 2021–Jan. 2022.

F. Analysis of Cherriots Rider Virtual Workshop — Characteristics of rider participants

Persons with disabilities. Respondents were asked if they identified themselves as persons with disabilities. Four out of 10 said they did.

The figure to the right presents these results.

F-8. Distribution of respondents who identified as persons with a disability, 2021

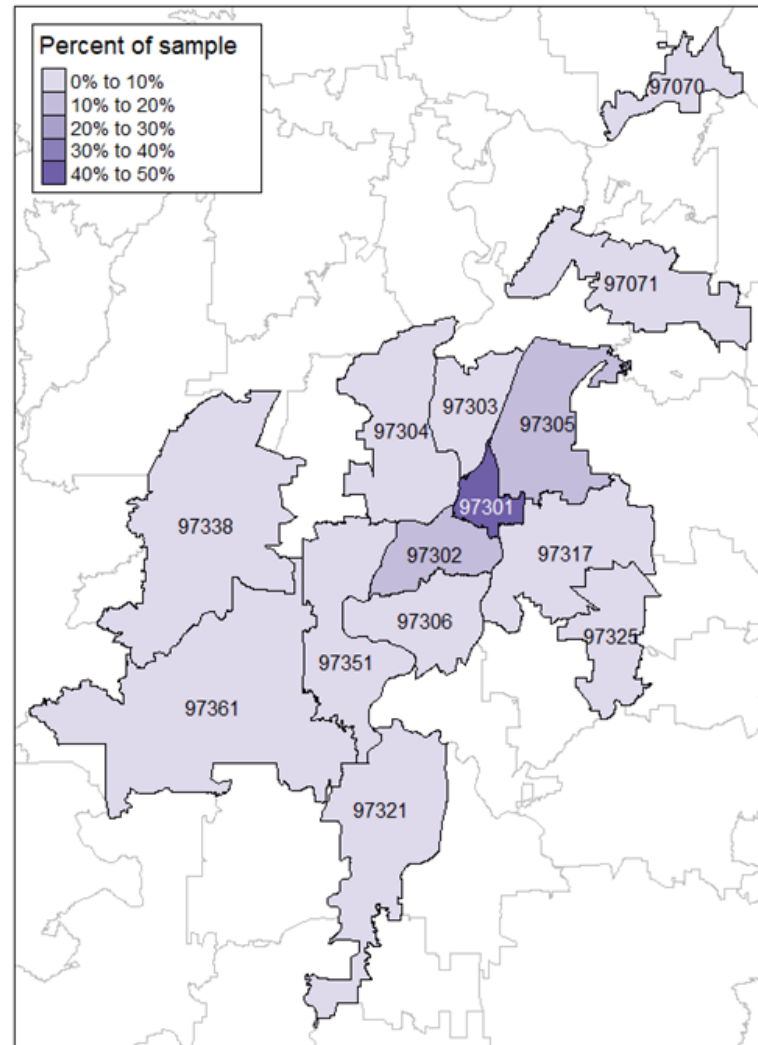


Source: Keen Independent Research Cherriots Rider Survey, Dec. 2021–Jan. 2022.

F. Analysis of Cherrlots Rider Virtual Workshop — Characteristics of rider participants

ZIP codes represented. Workshop participants were also asked what ZIP codes they reside in. Almost one-half were from ZIP code 97301 and the balance were from other parts of the service area.

F-9. ZIP codes represented, 2021



Source: Keen Independent Research Cherrlots Rider Survey, Dec. 2021–Jan. 2022.

APPENDIX G. Input from Cherriots Citizen Advisory Committee

Keen Independent met with members of the Citizens Advisory Committee (CAC) multiple times throughout this study, including at the quarterly CAC meeting held on September 21, 2021.

Below are some topics of discussion in an hour-long focus group discussion with CAC members.

Accessibility

CAC members agreed that an accessible transit system should make the entire route accessible from door to door. Therefore, an accessible transit system also encompasses walkability, transit stops and other barriers that riders may face.

Walkability. Members reported difficulties accessing transit services due to a lack of walkability. For example, some referenced transit stops on busy streets that did not have sidewalks or crosswalks. Members also noted that low-quality sidewalks (with large cracks or tree roots) are difficult or impossible for people with disabilities to manage.

CAC members noted that it may be beneficial to develop a streamlined way to report issues regarding the walkability of transit stops.

Transit stop improvements. After discussing general transit accessibility, members talked about how Cherriots is updating bus stops to comply with standards set in the Americans with Disabilities Act (ADA). These updates include bridging the gap between curbs and sidewalks, adding shelters and moving stops.

Other barriers. Members noted other barriers they face when accessing transit services, such as the frequency and speed of service.

CAC members also discussed knowledge of outright discrimination.

I know that there are many areas in Keizer where just being able to get from point A to a bus stop is very difficult just because of lack of sidewalks and other safety issues.

I see a number of areas in town where ... there isn't a crosswalk. And you have to navigate down several blocks, to then get across the street and then to walk over to get to a bus stop or wherever you might be going.

The sidewalk gets very dangerous too because the tree roots are pushing the sidewalk up and you walk, you could trip. And it's hard to get a wheelchair down the sidewalk sometimes.

The sidewalk is so bad in places ... I have to [walk] on the street.

East Salem is a little bit harder to get around than Downtown area. There's more stops and there's more traffic. So just getting across town quickly can be harder too.

Blind people with guide dogs can encounter problems with specific bus drivers. There are always new bus drivers, and it appears that training regarding service dogs is not entirely up to snuff.

G. Input from Cherriots Citizen Advisory Committee

Equity in Decision Making

CAC members discussed equity in route determinations, fare pricing and other service decisions.

Route determinations. Members talked about how Cherriots is a hub and spokes transit system that offers the best service toward the center hub. While it is cheaper to live closer to the edge of Cherriots' service area, transit stops are more spread out and those routes are often the first to be discontinued.

Members agreed that route and service-change decisions are equity concerns for the CAC.

Fare pricing. Committee members also discussed equity in fare price decisions, as well as the cost tradeoffs associated with different fare strategies. Members talked about the importance of continuing to evaluate fare decisions with an equity lens.

Service and fare decisions. Members learned that all service decisions are evaluated with an equity lens, and that Title VI applies to both services and fares. CAC members were assured although these evaluations are not perfect, these deliberations do happen.

The thing that concerns me is that the best transit that we have is towards the central part of the town ... if you're out on the fringes then it can be a long way to a bus stop ... in situations like now where we have reduced service 20 percent ... that has disenfranchised a good chunk of [people] in my part of town.

As an older person, it can be a long walk to a bus stop. The impact of doubling the frequency is that it could slow down the ability to keep on schedule. But I think more frequent bus stops would be an important thing for Cherriots to consider.

Good bus service is also based on the frequency of service ... the farther you get out into the edges of town, the more [costly] it is to provide frequent service. If the routes aren't heavily used, then it's hard to justify the costs of frequent service. On the other hand, without frequent service you can pretty well figure that they're not going to be heavily used.

For people who live farther away, I feel like there should be more equity in including them and making [cost] equitable, no matter where they live or how far they are travelling.

G. Input from Cherriots Citizen Advisory Committee

Improving the CAC

CAC members discussed ways to improve the Committee, including adjusting the role of the CAC and the frequency of meetings, improving community engagement efforts and re-launching the CAC.

Role of the CAC. Members agreed that the CAC should advocate for change regarding issues that impact mobility, even if it is outside of Cherriots' control. To that end, they also agreed that it would be appropriate for the CAC to compile a list of concerns (such as cracked sidewalks) and provide it to the Board.

Frequency of meetings. CAC members also agreed that meeting quarterly is insufficient. Members indicated that they often felt like the group was starting from scratch at each meeting, making it difficult to make progress. In order to improve CAC operations, members agreed to meet once every two months rather than quarterly.

Community engagement. CAC members discussed the need for more diverse representation and increased community engagement. Possible methods include hosting town hall meetings and having members attend community events.

Members also talked about the need for increased student input, as those individuals tend to be transit dependent. Some discussed ways to fill the CAC student opening (which remains unfilled), while others explored the idea of a separate committee comprised of students.

CAC re-launch. CAC members discussed how the Committee operated before the COVID-19 pandemic. The group agreed that the pandemic stalled the momentum that they had built. Members decided that the Committee should continue operating during the pandemic doing as much as possible, but plan for a CAC re-launch after pandemic-related restrictions are lifted.

[The CAC is] mostly made up of people who are already transit advocates, so that our work is, to a considerable extent, preaching to the choir. It would be good if we had ... more diverse representation on our committee.

It's a cinch that if [the Committee] didn't send a list of concerns ... that those would be far more likely to remain unaddressed. Anything we have to say would be a good thing to say.

One of the issues that bothered me is that the Committee meets four times a year ... it seems like it's hard to get momentum. It's hard to really feel like we make a difference when we only meet four times a year.

A group of people that are very transit-dependent are ... high school and middle school students. And they don't really have a voice to express their needs.

We need to recruit a high school student. And fill up ... the openings [the CAC has].

I often see [Cherriots] staff at events, festivals, activities and things like that. They have a table and information about Cherriots. And maybe some of us could sometimes go with them and talk about why we want to get information from the community about what their needs are. And we could ... be a part [of that conversation].

APPENDIX H. Procurement Analysis

Keen Independent analyzed how Cherriots procures construction, architecture and engineering services, goods and services.

The study team also collected information about how Cherriots has operated the Federal DBE Program. This includes information related to its goal setting, program eligibility, good faith effort requirements and other aspects of program operations.

Appendix H is organized into the following two parts:

- Procurement analysis; and
- DBE Program implementation analysis.

Procurement Analysis

The State of Oregon's Public Contracting Code requires public agencies, including cities and counties and special districts to establish and follow specific guidelines when procuring construction, goods or services from vendors.

These rules can be based on the following:

- The State of Oregon's Public Contracting Code (ORS 279A, 279B, 279C);
- The State of Oregon's Attorney General Model Rules (Chapter 137, Division 46-49);
- Rules and guidelines stipulated specifically by and for the contracting agency (subject to Oregon Revised Statutes); or
- A combination of the above options.

For federally funded contracts, agencies may also be required to follow federal compliance requirements, such as FTA Circular 4220.1F.

Figure H-1 summarizes Cherriots procurement processes. The table shows:

- Bidding thresholds;
- Bidding requirements;
- Basis for awarding contracts;
- Rules regarding advertisement of contracts; and
- Information about bonding and use of emergency contracts.

Information is provided for contracts in different industries (construction, architecture and engineering services, goods and services).

H. Procurement Analysis

H-1. SAMTD procurement practices for locally or state funded contracts

	Construction (public improvements)	Goods and services (including non-A&E-related professional services)	A&E, photogrammetric mapping, transportation planning, land surveying	Other services related to A&E
Bidding thresholds				
Requiring competitive sealed bids/proposals	Above \$150,000	Above \$150,000	Above \$150,000	Above \$150,000
Small purchase	\$10,001–\$150,000	\$10,001–\$150,000	\$10,001–\$150,000	\$10,001–\$150,000
Micro-purchase	\$10,000 or below	\$10,000 or below	\$10,000 or below	\$10,000 or below
Bidding requirements				
Competitive sealed bids/proposals	Public advertising	Public advertising	Public advertising	Public advertising
Small purchase	Solicitations from as many qualified sources as available	Solicitations from as many qualified sources as available	Solicitations from as many qualified sources as available	Solicitations from as many qualified sources as available
Micro-purchase	No bidding required	No bidding required	No bidding required	No bidding required
Means of public advertising	Local newspaper and/or electronic and statewide trade publications	Local newspaper and/or electronic	Local newspaper and/or electronic	Local newspaper and/or electronic
Basis for award				
Competitive sealed bids	Lowest responsive and responsible qualified bidder	Lowest responsive and responsible qualified bidder	N/A	N/A
Competitive sealed proposals	Responsive proposer with the best responsive proposal	Qualifications, price and other factors	Qualifications, price and other factors	Qualifications, price and other factors
Small purchase	Lowest responsive and responsible qualified vendor who meets the required specifications	Lowest responsive and responsible qualified vendor who meets the required specifications	Qualifications, price and other factors	Qualifications, price and other factors
Micro-purchase	\$10,000 or below	N/A (no bidding required)	N/A	N/A
Other				
Provision for emergency purchases where bidding requirements waived	Yes	Yes	Yes	Yes
Bonding requirements	Bid bond of 5% 100% performance bond (if \$100,000+) and payment bond of up to 50% (if \$1 million+)	Optional	Optional	Optional

H. Procurement Analysis

H-2. SAMTD procurement practices for federally funded contracts funded contracts

	Construction (public improvements)	Goods and services (including non-A&E-related professional services)	A&E, photogrammetric mapping, transportation planning, land surveying	Other services related to A&E
Bidding thresholds				
Requiring competitive sealed bids/proposals	Above \$250,000	Above \$250,000	Above \$250,000	Above \$250,000
Small purchase	\$2,001–\$250,000	\$10,001–\$250,000	\$10,001–\$250,000	\$10,001–\$250,000
Micro-purchase	\$2,000 or below	\$10,000 or below	\$10,000 or below	\$10,000 or below
Bidding requirements				
Competitive sealed bids/proposals	Public advertising	Public advertising	Public advertising	Public advertising
Small purchase	Solicitations from as many qualified sources as available	Solicitations from as many qualified sources as available	Solicitations from as many qualified sources as available	Solicitations from as many qualified sources as available
Micro-purchase	No bidding required	No bidding required	No bidding required	No bidding required
Means of public advertising	Local newspaper and/or electronic and statewide trade publications	Local newspaper and/or electronic	Local newspaper and/or electronic	Local newspaper and/or electronic
Basis for award				
Competitive sealed bids	Lowest responsive and responsible qualified bidder	Lowest responsive and responsible qualified bidder	N/A	N/A
Competitive sealed proposals	Responsive proposer with the best responsive proposal	Qualifications, price and other factors	Qualifications, price and other factors	Qualifications, price and other factors
Small purchase	Lowest responsive and responsible qualified vendor who meets the required specifications	Lowest responsive and responsible qualified vendor who meets the required specifications	Qualifications, price and other factors	Qualifications, price and other factors
Micro-purchase	\$2,000 or below	N/A (no bidding required)	N/A	N/A
Other				
Provision for emergency purchases where bidding requirements waived	Yes	Yes	Yes	Yes
Bonding requirements	Bid bond of 5% 100% performance bond (if \$100,000+) and payment bond of up to 50% (if \$1 million+)	Optional	Optional	Optional

H. Procurement Analysis

Bidding Thresholds

Different bidding requirements apply based on the size of the contract and whether a contract is locally, state or federally funded. For Cherriot's locally funded contracts, threshold amounts depend on the type of work, as summarized below:

- **Construction contracts.** Micro-purchases (\$10,000 or below), small purchases (\$10,000–\$150,000) and competitive sealed bids/proposals (\$150,000 or above).
- **Goods and services contracts.** Micro-purchases (\$10,000 or below), small purchases (\$10,000–\$150,000) and competitive sealed bids/proposals (\$150,000 or above).
- **Architecture and engineering and related services contracts.** Micro-purchases (\$10,000 or below), small purchases (\$10,001–\$150,000) and competitive sealed bids/proposals (\$150,000 or above).

For federally funded contracts, threshold amounts are as follows:

- **Construction contracts.** Micro-purchases (\$2,000 or below), small purchases (\$2,000–\$250,000) and competitive sealed bids/proposals (\$250,000 or above).
- **Goods and services contracts.** Micro-purchases (\$10,000 or below), small purchases (\$10,000–\$250,000) and competitive sealed bids/proposals (\$250,000 or above).
- **Architecture and engineering and related services contracts.** Micro-purchases (\$10,000 or below), small purchases (\$10,001–\$250,000) and competitive sealed bids/proposals (\$250,000 or above).

H. Procurement Analysis

Bidding Requirements

The typical bidding requirements for the different types of local or state funded Cherrriots procurements are as follows:

- **Micro-purchases.** Does not require competitive bids to award a contract.
- **Small purchases.** Must solicit quotes/proposals from as many qualified vendors as possible to award a contract.
- **Competitive sealed bids/proposals.** Must publicly advertise and open the contract for bids or proposals.

The following additional bidding requirements apply to Cherrriots procurements that have been federally funded:

- **Micro-purchases.** Are exempt from Buy America requirements.¹
- **Small purchases.** Are exempt from Buy America requirements if the amount is under \$150,000.² If a purchase is over \$50,000, an Independent Cost Estimate (ICE) form must also be completed and submitted with a Request for Procurement Services form or Purchase Requisition form for a purchase order.
- **Competitive sealed bids/proposals.** Are subject to Buy America requirements.³ Price is also excluded as an evaluating factor when awarding procurements for architectural and engineering services.

¹ Buy America regulations require a federal fund grantee to include in its bid or request for proposal (RFP) specification for procurement of steel, iron or manufactured goods (including rolling stock) an appropriate notice of the Buy America provision and require, as a condition of responsiveness, that the bidder or offeror submit with the bid or offer a completed Buy America certificate in accordance with 49 CFR §§661.6 or 661.12.

² Ibid.

³ Ibid.

H. Procurement Analysis

Basis for Award

The typical basis used to award locally, state and federally funded procurements are as follows:

- **Micro-purchases.** Directly awarded to a vendor of the contracting agency's choice.
- **Small purchases.** Awarded to the vendor whose offer will best serve the interests of the contracting agency, considering factors like qualifications and/or price.
- **Competitive sealed proposals.** Awarded based on ranking of proposed worksopes, qualifications, price and other non-price factors.
- **Competitive sealed bids.** Awarded to the lowest responsible bidder.

Means of Advertising or Other Public Notice

Public advertising is typically required for larger Cherriots procurements. Advertisements can be placed in newspapers of general circulation as well as electronically. When done electronically, ads are normally placed within Cherriots' website or a procurement information network (i.e., OregonBuys). Additionally, a construction contract may also be advertised in a statewide trade publication.

Bonds

Bid bonds can be required by Cherriots during the competitive bidding process. Bid bonds are typically for 5 percent of the contract value. Performance bonds for construction projects are also required and are usually for 100 percent of the contract value if the estimated cost of the contract is \$100,000 or more. If a contract is for \$1 million or more, payment bonds of up to 50 percent of the contract price are required as well.

Emergency Contracts

Cherriots also has procurement guideline exemptions that allow for bidding requirements to be waived for emergency purchases.

H. Procurement Analysis — DBE Program

As a recipient of U.S. Department of Transportation funds, Cherriots is required to operate the Federal Disadvantaged Business Enterprise (DBE) Program.

The Federal DBE Program requires agencies to set an overall goal for DBE participation and use DBE contract goals to meet any portion of their overall goal they do not project being able to meet using race-neutral means.⁴

The following describes key aspects of the Federal DBE Program and how Cherriots is currently operating the program.

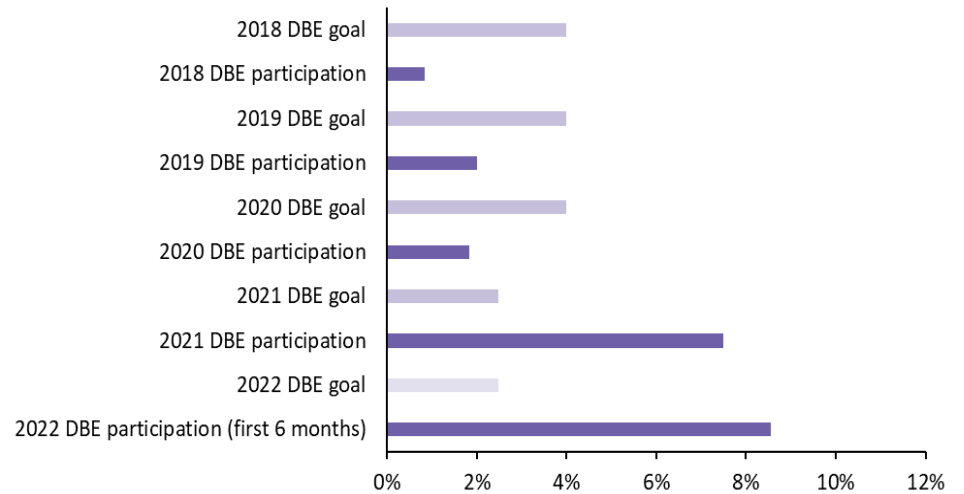
Setting Overall Annual DBE Goals

Cherriots submitted a triennial goal for DBE participation in its FTA-funded contracts of 2.49 percent for FFY2021–FFY2023. This goal is to be achieved solely through race-neutral means. (Its DBE goal prior to that was 4 percent for FFY2018–FFY2020).

The agency had difficulty meeting its overall DBE goal in previous years. Based on FFY2018–FFY2020 Uniform Reports, the highest DBE goal participation that Cherriots was able to obtain during that period was in 2019 when it awarded 2 percent of total funds to DBEs. In 2018 and 2020, those figures were 0.84 percent and 1.83 percent respectively. However, most recently, the agency has met its goal of 2.49 percent. In 2021, Cherriots awarded DBE’s 7.5 percent of total funds, and its first DBE Uniform Report for 2022 (dated 6/1/22) showed 8.55 percent for DBE participation. These figures are reflected in Figure H-3.

⁴ 49 CFR Section 26.51(d).

H-3. Cherriots DBE goal and participation by fiscal year, FFY2018–FFY2022



Source: SAMTD DBE Uniform Reports, FFY2018–FFY2022.

Eligibility for DBE Program Certification

Minority and women-owned firms that have been certified as DBEs by the State of Oregon’s Certification Office for Business Inclusion and Diversity (COBID) can be counted towards the agency’s annual DBE goal.

Use of DBE Contract Goals

Some agencies set goals for DBE participation in individual USDOT-funded contracts. Cherriots was not utilizing DBE contract goals at the time of this report. It attempts to achieve its overall DBE goal solely through race- and gender-neutral efforts.

H. Procurement Analysis — DBE Program

Efforts to Include DBEs and other Small Businesses in Cherriots Contracts

The agency has made efforts to increase the participation of DBEs and other small businesses in its contracts. Activities include:

- Answering questions that DBE firms have about the DBE Program and participating in agency contracts;
- Preparing materials in multiple languages to make sure that those are available to businesses with different backgrounds;
- Attending monthly outreach meetings for small businesses to inform DBEs of their program and potential contracting opportunities;
- Sending direct notices to DBEs and small businesses to increase outreach and promote diverse participation in the procurement process;
- Adding information in solicitations related to the agency's DBE Program to promote prime contractors' use of DBEs;
- Having a system for DBEs to file confidential complaints; and
- Attending local and regional outreach events (e.g., Governor's Marketplace, reverse-vendor trade shows, etc.) to promote doing business with Cherriots and to promote DBE participation.

APPENDIX I. Budget Analysis

Cherriots does not have a standalone budget for diversity, equity and inclusion-based initiatives. Such efforts are incorporated into the agency's overall budget.

Keen Independent reviewed Cherriots' budgeting process with equity considerations. Findings are discussed below.

Proposed Budget

Led by the General Manager, Cherriots develops a proposed budget for each fiscal year. Community members can access the proposed budget online and at the Cherriots administrative offices in Salem. After the proposed budget is developed, it is delivered to the Budget Committee.

Budget Committee

The Budget Committee is a citizens advisory group that meets to review, discuss and adjust the annual budget. The Committee usually meets at the Cherriots administrative office during the fourth quarter of the fiscal year.

Members. Guided by Oregon Department of Revenue requirements, the Committee is comprised of 7 Board members and 7 appointed citizens who serve three-year terms and face no term limits. Members of the Committee must be registered voters and live within the urban growth boundary area of Salem and Keizer.

The Committee aims to include one citizen member from each Board District. These positions are typically filled by Board members recruiting citizens to serve on the Committee. As of January 2022, all members of the Committee were non-Hispanic white.



Public input. All Budget Committee meetings have a public comment period, and community members are encouraged to provide input. The public can submit oral or written testimony about the budget or proposed programs within the budget. Testimony is included in the meeting's public record.

The Budget Committee has met virtually during COVID-19 pandemic. Committee meeting times are announced via a public notice. Members of the public can find meeting agendas and other information on how to attend on the Cherriots website.¹ Cherriots provides assistance to meeting attendees including materials in alternative formats, sign language interpretation and other communication aids.

Cherriots reports that it does not receive many budget-related comments from the community. Instead, the public provides input about allocation of resources when discussing service planning. Cherriots leads more extensive public engagement sessions when resource and funding amounts change.

Budget Finalization

Before next fiscal year begins (July 1), the Budget Committee must approve the proposed budget (with the Committee's adjustments, if appropriate) and the associated tax rate.

¹ See <https://www.cherriots.org/meetings/>

APPENDIX J. Complaints Analysis

Members of the public may file a complaint against Cherrriots multiple ways and for various reasons. After a complaint is filed, the agency works to resolve it and evaluates if it might include violations of Title VI and the Americans with Disabilities Act (ADA). Keen Independent reviewed and evaluated complaints and other statements from the public related to inequity in Cherrriots operations.

Title VI Complaints

Cherrriots has a Title VI Program to comply with the Civil Rights Act of 1964 and FTA grant recipient requirements.¹ Any individual who believes that they have been discriminated against on the basis of race, color or national origin can file a written Title VI complaint with Cherrriots. Information about the Title VI complaint procedure and form is available in English, Spanish and Russian. Title VI information is available online and on buses, and Cherrriots customer service can provide hard copies upon request.

From 2016 through mid-2021, two complaints alleged violation of civil rights. However, Cherrriots found that neither related to Title VI issues.

ADA Complaints

Individuals may request reasonable accommodations to ensure that services are accessible to those with disabilities. The Request for Reasonable Modifications Form is available online and may be submitted via mail or email. Riders may contact Cherrriots (by phone, mail or email) regarding accommodations with complaints, safety concerns or general feedback. Figure J-1 provides more information on Cherrriots reasonable accommodations policy.

J-1. Cherrriots requirements for reasonable accommodations

Accommodations must

- Not constitute a direct threat to the health and safety of others
- Be necessary for the individual to have full access to transit service
- Not constitute an undue administrative and financial burden
- Not fundamentally alter the existing service that is provided

Cherrriots received only two complaints from 2016 through September 2021. Both complaints were related to customer service and reasonable ADA accommodations. Specifically, bringing mobility-related equipment onto buses.

One complaint was resolved through discussion, after Cherrriots and the complainant found other ways to meet the mobility request.

A second complaint was not resolved through discussion. It reached Cherrriots' appeal process (without resolution), requiring the agency to engage legal counsel. At the time of the writing of this report, there is no resolution for either party. However, Cherrriots is rewriting policy regarding permissible items to provide further clarity for riders.

¹ See

https://www.cherrriots.org/media/doc/Cherrriots_Title_VI_Program_2017_Update.pdf

APPENDIX K. Research on Legislative Efforts of Public Transit Agencies

This document highlights findings from Keen Independent’s research on how public transportation agencies engage in lobbying and advocacy efforts. Analysis is focused on efforts related to diversity, equity and inclusion (DEI) in community mobility.

To obtain an understanding of how public transit agencies and non-transit organizations engage (or refrain from engaging) in policy advocacy, Keen Independent performed a review of the literature. Keen Independent also conducted case studies of five agencies from the region to understand how organizations can integrate this form of social responsibility into everyday operations:

- Tri-County Metropolitan Transportation District (TriMet) of Oregon;
- King County Metro Transit Department (Metro) of Washington;
- South Metro Area Regional Transit (SMART) in Oregon;
- Spokane Transit Authority (STA) in Washington; and
- Lane Transit District in Oregon.

This appendix is organized in the following sections:

- National Transportation Advocacy;
- Case Studies of Pacific Northwest Transit Agencies;
- Equity Advocacy in the Private Sector; and
- Conclusions.

K. Research on Legislative Efforts of Public Transit Agencies — Transit agency case studies

The American Public Transportation Association (APTA) is the primary organization advocating for public transit issues at the local, state and federal levels. APTA provides updates on transit-related policies across the nation, as well as resource materials for agencies to utilize when lobbying for support from local law makers. Efforts largely center on funding.¹

Much of APTA's recent legislative efforts have focused on the impact of the COVID-19 pandemic on the industry. Of the 16 reports published by APTA's Policy Development and Research Program from January 2020 to August 2021, 14 were related the fiscal concerns of the pandemic.²

However, sparked by the heightened awareness of social and racial justice due to protests of the spring and summer of 2020, APTA released a public statement and Racial Equity Action Plan. The statement contains four goals recommended to transit agencies by APTA President Paul Skoutelas, most of which relate to advocating and supporting marginalized community members.³

- **Connect all customers with decision-makers.** Agencies should go beyond calling for community involvement and holding public meetings. Instead, agencies should collaborate with neighborhood organizations and local activists to ensure marginalized populations have a voice.

- **Support broad investment in low-income communities.** Transit leaders should partner with technical schools, medical and research facilities, retailers, and investors to plan capital projects that can create jobs, training and affordable housing.
- **Prioritize transit resources for vulnerable communities.** Creating more equitable transportation systems requires re-evaluating priorities to focus on the people for whom transit is the only mode of mobility.
- **Question how decisions are made and consider the hidden consequences.** Transit agencies should develop assessment tools to review how they provide service, as well as how transit decisions impact issues, such as housing prices and the displacement of low-income populations.

¹ APTA. (n.d.). "Resource Materials." APTA. Retrieved August 4, 2021, from <https://www.apta.com/advocacy-legislation-policy/advocacy/resource-materials/>

² The Policy Development and Research Program. (n.d.). "Research Reports." APTA. Retrieved August 5, 2021, from <https://www.apta.com/research-technical-resources/research-reports/>

³ Skoutelas, P. (2021). "Looking at Equity Through a Different Lens." APTA. Retrieved August 24, 2021, from <https://myemail.constantcontact.com/Looking-at-Equity-Through-a-Different-Lens--A-message-from-APTA-s-CEO.html?soid=1127252305719&aid=00GzHBV51nU>

K. Research on Legislative Efforts of Public Transit Agencies — Transit agency case studies

To understand how transit agencies do (or do not) advocate for equity, Keen Independent examined five agencies within the Pacific Northwest. The study team reviewed the types of public actions taken by the agencies excluding lobbying related to funding. (Most transit agencies engage in this form of lobbying.)

Tri-County Metropolitan Transportation District of Oregon (TriMet)

TriMet provides bus, paratransit and rail services to individuals throughout the Portland metropolitan area. It is one of the most legislatively active transit agencies in the region. With a dedicated lobbyist, the organization regularly makes public comments about Oregon State House and Senate measures.⁴



⁴ Njus, E. (2016, Feb. 10.) "Bill Would Let TriMet, Other Transit Agencies Tax Employee's Wages." The Oregonian. Retrieved August 5, 2021, from https://www.oregonlive.com/commuting/2016/02/bill_would_allow_trimet_other.html

K. Research on Legislative Efforts of Public Transit Agencies — Transit agency case studies

Legislative advocacy examples. The following are three examples of recent bills that TriMet lobbied:

- **House Bill 3055 (2021).** House Bill 3055 was a large transportation bill comprised of many unrelated transit items. The most prominent and publicized facet of this bill was the revision of congestion price tolling to fixed-rate tolling on I-5 and I-205. TriMet, along with the City of Portland and Multnomah County, publicly opposed House Bill 3055, citing that new tolling strategies would not deter interstate traffic during peak drive time, and that increased traffic would result in negative environmental impact.⁵ This bill was passed and signed by the Governor. It will be effective September 25, 2021.⁶
- **House Bill 4097 (2020).** House Bill 4097 was an effort to prevent sworn police officers from citing and/or arresting individuals for failure to pay public transportation fares, an issue that the courts have found can violate riders' constitutional rights. TriMet argued against House Bill 4097, reasoning that police were not called solely to cite fare evasion (which is a task of TriMet fare enforcement officers),

but instead to provide a “safety presence” for staff and passengers, as well as assistance during escalating situations. TriMet representatives explained that law enforcement officers had successfully used fare enforcement situations to catch criminals with active warrants. House Bill 4097 stalled in the legislature in 2020.⁷

- **House Bill 2677 (2019).** House Bill 2677 sought to elevate the assault of any transit employee to the status of a felony assault in the third degree (from a misdemeanor) with a five-year imprisonment maximum penalty. By 2019, the State had already elevated misdemeanor assaults of those within a designated class (e.g., police officers, EMTs and public transit drivers). However, House Bill 2677 worked to expand elevation to all public transit employees at work — drivers and otherwise.⁸ TriMet and labor advocated for the passing of House Bill 2677, calling for greater worker safety after citing rising simple and aggravated assaults of employees (a rise that was not supported by data).⁹ This bill stalled in the legislature in 2019.¹⁰

⁵ Jaquiss, N. (2021, Feb. 10). “The Legislature’s Transportation Leaders Want to Put the Brakes on Congestion Pricing and Hit the Gas on Tolling.” Willamette Week. Retrieved August 5, 2021, from <https://www.wweek.com/news/2021/02/10/the-legislatures-transportation-leaders-want-to-put-the-brakes-on-congestion-pricing-and-hit-the-gas-on-tolling/>

⁶ Oregon Legislative Information. (2021). “2021 Regular Session: HB 3055 Enrolled.” Oregon State Legislature. Retrieved August 5, 2021, from <https://olis.oregonlegislature.gov/liz/2021R1/Measures/Overview/HB3055>

⁷ Oregon Legislative Information. (2020). “2020 Regular Session: HB 4097 A.” Oregon State Legislature. Retrieved August 5, 2021, from <https://olis.oregonlegislature.gov/liz/2020R1/Measures/Overview/HB4097>

⁸ Shepherd, K. (2019, Feb. 27). “Slap a Bus Driver, Go to Jail.” Willamette Week. Retrieved August 5, 2021, from <https://www.wweek.com/news/state/2019/02/27/slap-a-bus-driver-go-to-jail-thats-the-concept-behind-a-new-bill-dividing-left-wing-interests-in-salem/>

⁹ Ibid.

¹⁰ The Oregonian. (2019). “2019 Session.” The Oregonian. Retrieved August 5, 2021, from <https://gov.oregonlive.com/bill/2019/HB2677/>

K. Research on Legislative Efforts of Public Transit Agencies — Transit agency case studies

Press releases. TriMet publishes press releases on its website blog one to two times per month. These posts relate to developments at the agency, riding tips for customers, public safety and more. From January 1, 2020, to August 1, 2021, TriMet posted to the blog 34 times. Of these, four were related to social equity (roughly 12%).

- [“What is transit-oriented development?” July 13, 2021.](#)¹¹ An explanation of TriMet’s past transit-oriented development projects and future plans. for partnering with housing and commercial developers to develop transit centers with affordable housing.
- [“Reimagining public safety and security on transit” November 20, 2020.](#)¹² A post outlining the next steps taken and planned by TriMet regarding public safety on its services.
- [“Raising our voices against hate, discrimination and systemic racism” June 8, 2020.](#)¹³ A public statement from the Board of Directors triggered by the George Floyd protests of spring 2020. The statement underscores the need for TriMet to “gain a deeper understanding of where our agency can further support Black, Indigenous, Asian Pacific Islander, Latinx, Immigrant and other People of Color.” And, for the agency to do its part to “undo the systems of injustice.”

- Conducting two fare citation studies to investigate potential racial bias:
 - Decriminalization of fare enforcement;
 - Reducing fare evasion penalties;
 - Developing a low-income fare program;
 - Increasing unarmed security presence;
 - Reducing the use of Interfering with Public Transportation charges via the district attorney; and
 - Providing additional training on community safety practices to security staff and inspectors.

¹¹ TriMet. (2020). “What is transit-oriented development?” Retrieved August 11, 2021, from <https://blog.trimet.org/2021/07/13/what-is-transit-oriented-development/>

¹² TriMet. (2020). “Reimagining public safety and security on transit: Recommendations and what comes next” Retrieved August 11, 2021, from

<https://blog.trimet.org/2020/11/20/reimagining-public-safety-security-on-transit-recommendations-and-what-comes-next/>

¹³ TriMet. (2020). “Raising our voices against hate, discrimination and systemic racism.” Retrieved August 11, 2021, from <https://blog.trimet.org/2020/06/08/raising-our-voices-against-hate-discrimination-systemic-racism/>

K. Research on Legislative Efforts of Public Transit Agencies — Transit agency case studies

King County Metro Transit Department (Metro)

Metro is a multimodal service with buses, light rail, trains and paratransit vans that serve the Seattle metropolitan area and broader King County. The agency is a department of King County 14 and is advised by six advisory groups, including the equity-related Community Advisory Group, the King County Mobility Coalition and the Access Paratransit Advisory Committee.¹⁵

Because Metro is a department of the County, it does not appear to independently engage in legislative lobbying or advocacy.

However, King County Metro updates the “Metro Matters” blog several times per month. From April 1, 2021, to August 1, 2021, Metro published 30 posts. Seven were related to social equity.

- “Metro celebrates Arab American History Month” April 30, 2021.¹⁶ A celebration of Arab American History Month, as well as resources for learning more about the community in King County.



¹⁴ King County. (2020, Dec. 2). “Executive Constantine Appoints Terry White Metro General Manager.” King County Washington. Retrieved August 6, 2021, from <https://kingcounty.gov/elected/executive/constantine/news/release/2020/December/02-metro-gm-terry-white.aspx>

¹⁵ Metro. (n.d.). “Advisory Groups.” King County Washington. Retrieved August 6, 2021, from <https://kingcounty.gov/depts/transportation/metro/about/advisory-groups.aspx>

¹⁶ King County. (2021). “Metro celebrates Arab American History Month.” King County Washington. Retrieved August 11, 2021, from <https://kingcountymetro.blog/2021/04/30/metro-celebrates-arab-american-history-month/>

K. Research on Legislative Efforts of Public Transit Agencies — Transit agency case studies

- “Update on Safety, Security, and Fare Enforcement (SaFE) reform initiative” May 2, 2021.¹⁷ An update on the County’s prioritization of anti-racism. Metro underlined a focus “that riders and operators feel safe throughout our mobility system while ensuring that all communities are afforded dignity and respect.”

The announcement includes next steps:

- Define and engage with employees and stakeholders;
- Establish transparency in decision-making, set expectations, and reach agreement on the SaFE reform approach and scope;
- Reevaluate current policies and practices and how those adversely impacted experience the impacts of these policies and procedures; and
- Empower the community to implement recommendations.

- “Celebrating Asian American and Pacific Islander Heritage Month” May 28, 2021.¹⁸ A celebration of Asian American and Pacific Islander Heritage Month, with comment about recent spikes in anti-Asian hate crimes.
- “Pride 2021: Metro joins the community in celebrating LGBTQIA+” June 16, 2021.¹⁹ A declaration of Metro’s commitment to creating a safe space and community for LGBTQIA+ riders and employees, alongside a promotional #Pride video.
- “Celebrating Juneteenth, Honoring Black Lives” June 17, 2021.²⁰ A celebration of Juneteenth that outlines the steps Metro is taking to be more inclusive of riders and employees of color. This post also highlights Metro’s journey as an “anti-racist” organization “focused on aligning our values with the service we deliver through guidance from our Equity Cabinet, a group of leaders from diverse communities, who together authored our Mobility Framework.”

¹⁷ King County. (2021). “Update on Safety, Security, and Fare Enforcement (SaFE) reform initiative.” King County Washington. Retrieved August 11, 2021, from <https://kingcountymetro.blog/2021/05/04/update-on-safety-security-and-fare-enforcement-safe-reform-initiative/>

¹⁸ King County. (2021). “Celebrating Asian American and Pacific Islander Heritage Month.” King County Washington. Retrieved August 11, 2021, from <https://kingcountymetro.blog/2021/05/28/celebrating-asian-american-and-pacific-islander-aapi-heritage-month/>

¹⁹ King County. (2021). “Pride 2021: Metro joins the community in celebrating LGBTQIA+.” King County Washington. Retrieved August 11, 2021, from <https://kingcountymetro.blog/2021/06/16/pride-2021-metro-joins-the-community-in-celebrating-lgbtqia/>

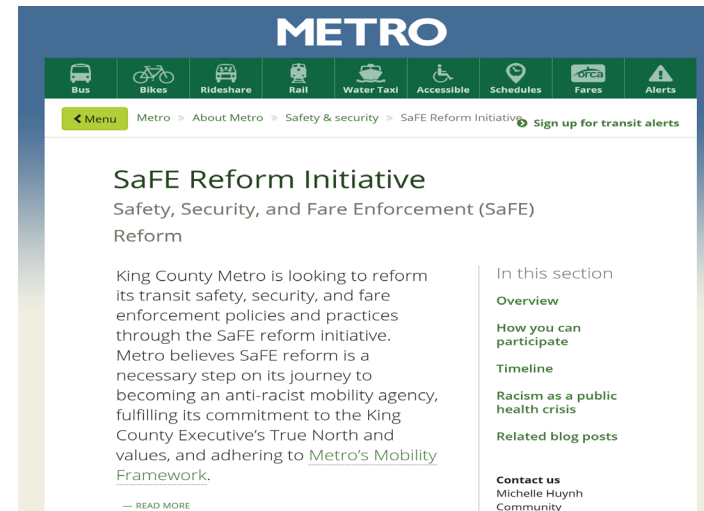
²⁰ King County. (2021). “Celebrating Juneteenth, Honoring Black lives.” King County Washington. Retrieved August 11, 2021, from <https://kingcountymetro.blog/2021/06/17/celebrating-juneteenth-honoring-black-lives/>

K. Research on Legislative Efforts of Public Transit Agencies — Transit agency case studies

- “Youth for Equitable Streets — Youth perspectives on transit” July 1, 2021.²¹ An overview of “Youth for Equitable Streets,” a research project investigating how young people of color perceive and use Metro, as well as recommendations developed through the project.
- “Increased mobility options arrive in Rainier Beach, Skyway, Tukwila and Renton with expanded Via to Transit” July 29, 2021.²² An announcement of increased service area of Via to Transit, an on-call vehicle transportation, to neighborhoods that lack adequate transit services (e.g., Rainier Beach, Skyway, Tukwila and Renton) and are known to house people of color with limited English language ability.

Metro’s equity statements are heavily tied to County initiatives. It appears that most initiatives are developed and advanced by the County, and later implemented by Metro. For example, Metro’s SaFE Reform Initiative was created after the County publicly prioritized anti-racism in the 2021-2022 County executive budget.

K-1. Metro’s SaFE Reform Initiative website



Source: King County Metro. (n.d.). “SaFE Reform Initiative.” Retrieved August 12, 2021, from <https://kingcounty.gov/depts/transportation/metro/about/safety-security/safe-reform-initiative.aspx>.

²¹ King County. (2021). “Youth for Equitable Streets — Youth perspectives on transit.” King County Washington. Retrieved August 11, 2021, from <https://kingcountymetro.blog/2021/07/01/youth-for-equitable-streets-youth-perspectives-on-transit/>

²² King County. (2021). “Increased mobility options arrive in Rainier Beach, Skyway, Tukwila and Renton with expanded Via to Transit.” King County Washington. Retrieved August 11, 2021, from <https://kingcountymetro.blog/2021/07/29/increased-mobility-options-arrive-in-rainier-beach-skyway-tukwila-and-renton-with-expanded-via-to-transit/>

K. Research on Legislative Efforts of Public Transit Agencies — Transit agency case studies

South Metro Area Regional Transit (SMART)

SMART is a bus transit service with 7 routes in the City of Wilsonville, Oregon. Some of SMART's service area overlaps with Cherriots'. Originally a part of TriMet, SMART is department of the City of Wilsonville that is directed by the Mayor and City Council.

Since SMART is a department of the City, it does not appear to engage in legislative lobbying and advocacy, similar to King County Metro.

SMART intermittently publishes press releases on the City of Wilsonville's website. These posts relate primarily to services and funding.

From June 27, 2018, to August 12, 2021, SMART published six posts, of which none were related to social equity.

It should be noted that a review of the City of Wilsonville's press releases during this same time period also found no mention of social equity. Therefore, this approach of limited commentary on equity likely is a City-wide rather than departmental.



K. Research on Legislative Efforts of Public Transit Agencies — Transit agency case studies

Spokane Transit Authority (STA)

STA is a regional multimodal public transportation benefit area (PTBA) and municipal corporation that serves the City of Spokane, Washington, and the surrounding area. It is overseen by a nine-member Board of Directors that represent neighborhoods within the County of Spokane. STA is advised by five committees: Board Operations Committee, Planning and Development Committee, Performance Monitoring and External Relations Committee, Citizen Advisory Committee and Central City Line Steering Committee.

Despite being organized similar to the politically active TriMet, STA does not appear to engage in lobbying or advocacy efforts related to diversity, equity or inclusion.

Like SMART, STA intermittently publishes press releases on the a “What’s New” blog. Many of these relate to services and public health concerns.

From July 1, 2021, to August 12, 2021, STA posted 7 times, none of which were related to social equity.



Spokane Transit



K. Research on Legislative Efforts of Public Transit Agencies — Transit agency case studies

Lane Transit District (LTD)

Lane Transit District is a bus service for the cities of Eugene, Springfield and the surrounding areas. LTD is overseen by a seven-member Board of Directors who represent subdistricts within the agency's service area, and who are appointed by the Governor. The Board is advised by five subcommittees: a Contract Committee, Ad Hoc Sustainability Committee, Budget Committee, Strategic Planning Committee and Comprehensive and Accessible Transportation Committee. The last three of these committees are run and served by community members.

Similar to SMART and STA, LTD does not appear to engage in lobbying or advocacy efforts related to equity.

Press releases. LTD publishes press releases several times a week on its "Latest News" blog. Many of these relate to services and public health concerns, such as the promotion of the COVID-19 vaccination.

From January 1, 2021, to August 24, 2021, LTD posted 42 times, of which two were related to social equity (roughly 5%):

- "Apology to the Transgender Community" March 17, 2021.²³ An apology regarding a commercial that featured a male actor playing multiple gender roles. The statement acknowledges the discrimination and misunderstanding transgendered people face in everyday life, and outlines action steps to remedy the situation.

²³ LTD. (2021). "Apology to the Transgender Community." LTD. Retrieved August 24, 2021, from <https://www.ltd.org/latest-news/apology-to-transgender-community/>

- "For Earth Day, public transit means climate equity" April 22, 2021.²⁴ A letter from a Board member that details how utilizing public transit can be one way to "support economic efficiency and social equity," as well as reduce one's impact on the environment.



²⁴ Skov, J. (2021). "For Earth Day, Public Transit Means Climate Equity." LTD. Retrieved August 24, 2021, from <https://www.ltd.org/latest-news/for-earth-day-public-transit/>

K. Research on Legislative Efforts of Public Transit Agencies — Private sector examples

Unlike public sector entities, there has been a growing trend for organizations in the private sector to actively engage in DEI-related advocacy. Notable examples in the Pacific Northwest include:

- Alaska Airlines;
- Dutch Brothers Coffee;
- Intel;
- Nike;
- Powell’s Books;
- REI;
- Seattle Seahawks; and
- Seattle Sounders FC.

These companies utilize the following advocacy methods:

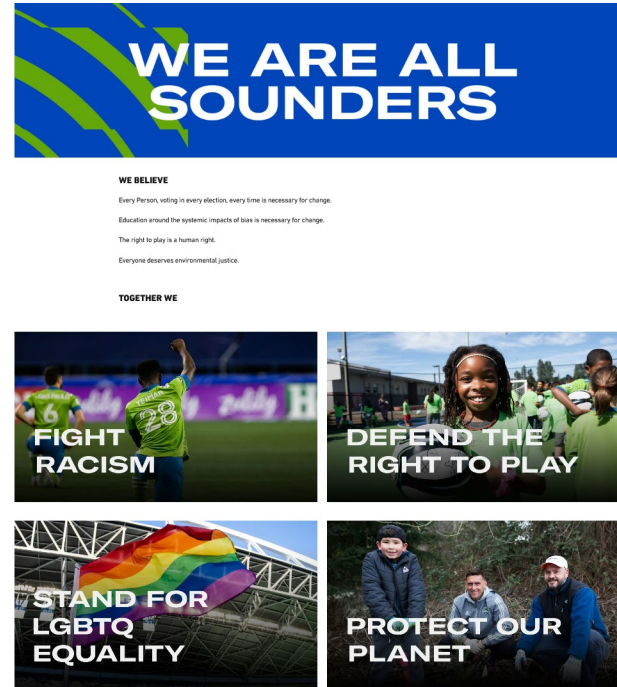
Public Announcements

Statements of commitment to social and racial equity are a common tactic used by organizations. These announcements typically occur on company websites and social media accounts, as well as through formal press releases. See Figure K-2 for an example.

Workforce Initiatives

Many companies make pledges to increase DEI within their workforces through expanded outreach and recruitment efforts. There is also a growing focus on increasing diverse representation among leadership and management levels.

K-2. Announcement from Seattle Sounders FC outlining dedication to social and environmental equity



Source: Sounders FC. (n.d.). “Social Impact.” Retrieved August 12, 2021, from <https://www.soundersfc.com/social-impact/>

K. Research on Legislative Efforts of Public Transit Agencies — Private sector examples

Dedicating Funding

Some companies commit money towards social justice and educational initiatives. For example, in 2020 after the George Floyd protests, Nike committed \$140 million over the course of 10 years to national and local organizations that support Black Americans, such as NAACP, Black Girls CODE, Black Voters Matter and The Formerly Incarcerated and Convicted People and Families Movement.²⁵ Alaska Airlines also recently committed to annual donations of one million air miles to students at Historically Black Colleges and Universities to assist in the education of Black students.²⁶

Symbolic Acts

Large advertisements, proclamations and rebranding are other ways organizations reiterate a dedication to social and racial equity. For example, Alaska Airlines created an “Our Commitment” aircraft to symbolize and publicize the company’s support of “education and advancing racial equity,” and highlight the words of civil rights activist, Dr. Martin Luther King Jr. See Figure K-3 for reference.

Despite these internal and community-centered efforts, most private companies that have promoted the need for advancement in equity do not engage in legislative advocacy or lobbying on this topic.

K-3. Alaska Airlines “Our Commitment” Airplane



Source: Alaska Airlines. (2021). “Alaska Airlines Takes Education and Equity to the Skies with Newest Aircraft.” Retrieved August 12, 2021, from <https://blog.alaskaair.com/values/alaska-airlines-our-commitment-aircraft/>

²⁵ Nike. (n.d.). “Our Black Community Commitment.” Retrieved August 12, 2021, from <https://purpose.nike.com/our-commitment-to-the-black-community>

²⁶ Moore, C. (2021, Apr. 27). “Alaska Airlines Unveils new Plane, Diversity Campaign that Aims to Advance ‘Racial Equity’.” New York Post. Retrieved August 12, 2021, from

<https://nypost.com/2021/04/27/alaska-airlines-unveils-new-plane-diversity-campaign-that-aims-to-advance-racial-equity/>

K. Research on Legislative Efforts of Public Transit Agencies — Conclusions

Research by the study team finds that the majority of small- and mid-sized transit agencies in the Pacific Northwest do not actively engage in political advocacy or legislative actions related to diversity, equity or inclusion. Additionally, agencies that are departments within local governments, such as SMART, tend to remain apolitical in their outward statements and actions.

Conversely, larger, independent organizations, such as TriMet, do participate in political lobbying and the legislative process.

The primary way that transit agencies announce support for (or opposition of) equity-related policies, practices or opinions is through press releases on agency blogs.

Transit agencies that aspire to participate more in local and state legislation can look to the private sector for more innovative and varied methods of engagement, such as symbolic acts, dedicated funding and announcement of internal and external initiatives.

APPENDIX L. Public Safety

The safety of Cherriots employees and riders is overseen by the Security and Emergency Management Department. The Department coordinates security efforts with Allied Universal, a private security company, and the Salem Police Department (Salem PD). The Security and Emergency Management Department also:

- Operates and updates video camera security systems;
- Creates and implements safety training programs;
- Develops security plans;
- Develops communications messaging targeted at riders to increase safety and awareness;
- Maintains building access control systems;
- Enforces safety-related rules and ordinances;
- Coordinates vehicle towing;
- Receives and responds to citizen complaints; and
- Performs security inspections of facilities, shelters and vehicles.¹

Private security officers. Allied Universal personnel are contracted to patrol Cherriots facilities and services. Security personnel are mostly present at the Downtown and Keizer transit centers, but also perform random bus safety rides. Riders can request security via telephone as well as by contacting Cherriots customer service agents stationed at transit centers.²

¹ Cherriots. (n.d.). "June 24, 2020 Recruitment Announcement." Salem Area Mass Transit District. Retrieved August 2, 2021, from <https://www.google.com/url?sa=t&rct=j&q=&esrc=s&source=web&cd=&cad=rja&uact=8&ved=2ahUKewjj6e38h5PyAhVxGTQIHW68CD0QFnoECAYQAw&url=https%3A%2F%2F>

Allied Universal officers are unarmed and trained to deescalate situations. Salem PD is called for assistance when serious safety and/or mental health issues arise.

Allied Universal has had a security contract with Cherriots since 2018. Cherriots' first contract with a security company was with G4S, from 2012 through 2017. Before that, one Cherriots staff person performed security duties with Salem PD assistance when needed.

Unlike most state-licensed security officers, who frequently change locations, security officers that are assigned to Cherriots work exclusively at the agency. Security officers undergo extensive classroom and on-the-job training.

Salem Police Department. Cherriots staff have been granted direct access to the Salem Police Department, allowing the agency to bypass 911 and other police lines in times of emergency. Salem PD bicycle officers who are familiar with Cherriots' safety mechanisms frequently patrol the downtown area, enabling them to quickly assist any passengers in need of help.

Other law enforcement. Though there are no formal agreements with law enforcement agencies outside of Salem PD's jurisdiction, Cherriots works with local police and sheriff's departments in the other areas it serves to enforce transit ordinances, help passengers in need and maintain overall public safety.

www.cherriots.org%2Fmedia%2Fdoc%2FSECURITY_COORDINATOR_2020-06-24.pdf&usg=AOvVaw20trzOJAnYkaOXhvLNMNHn

² Cherriots. (n.d.). "Security." Salem Area Mass Transit District. Retrieved August 2, 2021, from <https://www.cherriots.org/security/>

L. Public Safety — Exclusions

Exclusion Policy

Cherriots has an exclusion policy in place, which places a temporary ban on passengers who break agency rules or engage in illegal activity while utilizing Cherriots' transportation services. Exclusions can be made for behavior including disorderly conduct (e.g., verbal threats, yelling and cursing), substance use, theft, trespassing and pet animal-related issues

Duration of exclusion. Most exclusions last for 30 days or less. The length of an exclusion is determined by factors such as the person's behavior, type of infraction, number of prior exclusions and whether they were cited or arrested.

Exclusion appeal policy. There is an appeal policy in place that people who are issued an exclusion can utilize to challenge their temporary ban. Appeal guidelines are provided to everyone issued an exclusion. Appeals are typically processed within days of being received. In most cases, those who make an appeal have the duration of their exclusion significantly reduced or ended immediately.

Demographics of exclusion recipients. Since the pandemic, most passengers who are issued an exclusion have been under the influence of alcohol or drugs, have a mental health condition or are experiencing homelessness. However, security officers are not trained to make mental health assessments, so many of these reports are based on officers' best-interpretation of the situation.

There are currently no data available on the race/ethnicity of passengers who are issued exclusions.

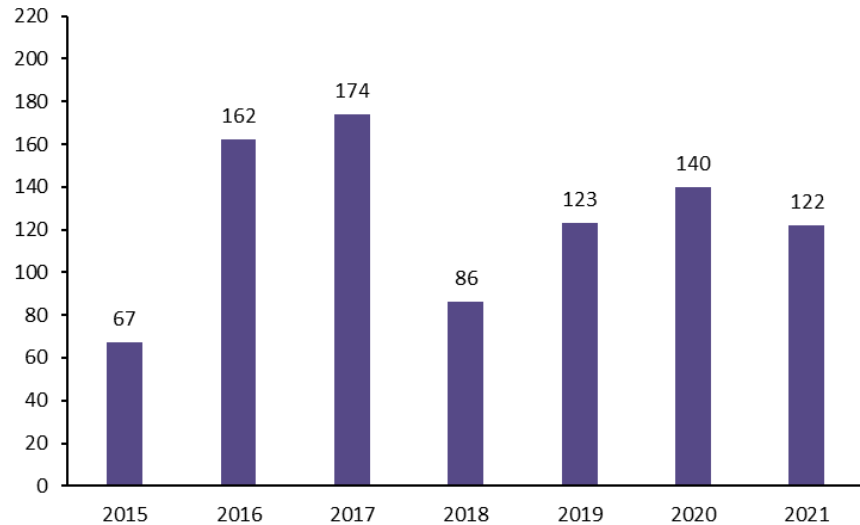
Exclusion Trends

Cherriots attempts to use exclusions as a last resort. Progressive discipline is used starting with a verbal warning or public education, then moving to a written warning and then exclusion.

Figure L-1 shows that the number of exclusions by year.

Note that there are thousands of verbal warnings given each year, most of which did not lead to exclusions.

L-1. Incidents of exclusions at SAMTD, FFY2015 to FFY2021



Source: Keen Independent Research summary of SAMTD Annual Security Reports from 2016 to 2021.

L. Public Safety — Police

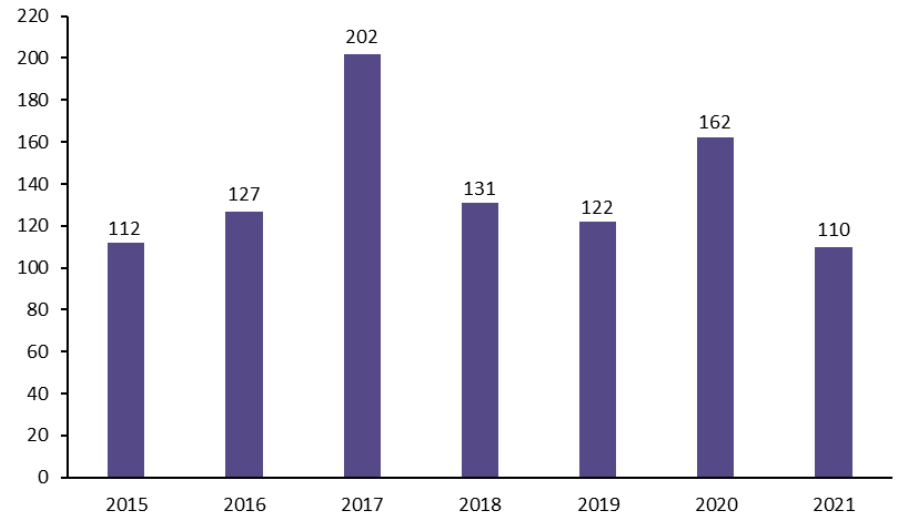
Trends in Requests for Police Assistance

Figure L-2 shows the combined number of police requests from FFY2015 through 2021. The peak number of requests for police assistance was in FFY2017.

Since the COVID-19 pandemic, Cherriots has made greater efforts to de-escalate situations to avoid requesting police assistance.

- Security officers were now taking more responsibility handling situations and aim to exhaust all efforts before calling the police. Figure L-2 shows the drop in requests for police at SAMTD in FFY2021.
- Police officers were reportedly making extra efforts to persuade individuals to leave Cherriots property instead of making an arrest.

L-2. Requests for police at SAMTD, FFY2015 to FFY2021



Source: Keen Independent Research summary of SAMTD Annual Security Reports from 2016 to 2021.

L. Public Safety — Equity statements

Review of SAMTD’s “Security” website and Allied Universal’s company website finds that neither organization has public statements regarding equity in public safety.

Salem PD issued a statement in December 2020 denouncing racism.³ Chief of Police Trevor Womack’s statement is included to the right.

L-3. Salem Police Department Police Chief Trevor Womack’s statement



To the Salem Community,

As I complete my second week as your Chief of Police, I want to assure you I have listened and heard the questions and concerns expressed related to the recent and continuing protests. I highly value transparency, so I believe it is critical to immediately begin openly sharing information and answering questions as fully as possible. To that end, we are providing online [answers](#) to the most common questions we have received. We will update this web page as necessary to ensure it remains current, accurate, and contains timely information.

My staff and I are continually assessing available information about potential protests, planning appropriate responses, and communicating and coordinating with our partner law enforcement agencies and the community. Our priorities for any protest are to protect the rights of citizens to freely express themselves and peaceably assemble, while preventing violence and destruction of property.

During recent protests, speech has occurred that is racist and offensive. We as police officers can do little to stop such offensive language. *However, let me be very clear, I do not condone nor support racist speech, and condemn racism in all its ugly forms including white supremacy.* There is no place for hatred in our community or within the Salem Police Department.

I look forward to the coming new year with hope and anticipation. I know that together, as one community, we can improve safety, bring a sense of peace and mutual respect, and build bridges of trust across all cultural and socio-economic boundaries.

Thank you and Happy Holidays.

A handwritten signature in blue ink, appearing to read "T. Womack", with a stylized flourish at the end.

Trevor Womack
Chief of Police
Salem Police Department

³ Salem Police Department. (2020, Dec. 18). “A Statement from Chief Womack Denouncing Racism.” City of Salem. Retrieved August 2, 2021, from

<https://www.cityofsalem.net/Pages/a-statement-from-chief-womack-regarding-protests.aspx>

APPENDIX M. Analysis of Transit DEI Communications Strategy

Research has found that successful DEI efforts are those that maintain clear and consistent communications with the local community. Messaging in these communications is consistent, clear and strike a balance between imparting knowledge and storytelling.¹

Effective DEI communications platforms include:

- Presentations to community leaders (who disseminate information to members of their community group);
- Presentations to government councils, boards and other governing bodies;
- Presentations to local organizations;
- Community town hall meetings;
- A dedicated website;
- An email list of interested parties;
- Social media;
- Press releases;
- Traditional media campaign (e.g., printed mailers, radio and television spots, billboards); and
- Interviews with local media.



To understand how transit agencies communicate equity initiatives and programs and general best practices, Keen Independent prepared:

- A literature review (of academic and non-academic sources);
- Review of SAMTD's DEI communications to date;
- Analysis of communications strategies utilized by public transit agencies in Oregon in equity-related messaging and engagement; and
- Additional strategies to consider in the future.

This report summarizes this information.

¹ GARE. (2018, May 18). "GARE Communications Guide." RacialEquityAlliance.org. Retrieved August 5, 2021, from <https://www.racialequityalliance.org/tools-resources/communication-tools/1-052018-gare-comms-guide-v1-1-2/>

M. Analysis of Transit DEI Communications Strategy — Literature review

The following analyzes information that can guide Cherrlots' future DEI communications plans.

Mission Statement and Vision

Existing literature underscores the need for an organization to make a strong and consistent commitment to DEI. This commitment can come communicated through a mission statement, organizational declaration, press release and other means. Statements that are accompanied with a specific implementation plan tend to be more accepted, as it shows action and commitment. As the Society for Human Resource Management explains, "If a poster on the wall proclaims a commitment to DE&I with little to no action to back it up, the message will not ring true, and could eventually do more harm than good."²

The Affirm-Counter-Transform Process³

There are ways to include community members in an organization's efforts. Through these steps, community members can feel listened to during the planning phase and can envision themselves as part of the team that is advancing progress and equity. This can be achieved through the affirm-counter-transform (ACT) process:

- **Affirm.** Begin by affirming core values that your audience shares with the equity effort. Reinforce the idea that all parties are working together to better the community.

- **Counter.** When needed, use data and storytelling to counter a listener's point, but in a manner that points to systemic and structural drivers of inequity. Use direct language and contrast the reality of the situation with what it will look like if an equity plan is achieved.
- **Transform.** Transform the audience's current view of reality by providing a step-by-step approach to achieving progress. Reiterate the desire to work together.

Audience interaction can follow the ACT process, particularly with those who may be skeptical or question the motives of the organization.



² Society for Human Resource Management. (n.d.). "Guide to Developing a Strategic Diversity, Equity and Inclusion Plan." Retrieved August 17, 2021, from <https://www.shrm.org/resourcesandtools/tools-and-samples/hr-forms/pages/guide-to-developing-a-strategic-diversity-equity-and-inclusion-plan.aspx>

³ GARE. (2018, May 18). "GARE Communications Guide." RacialEquityAlliance.org. Retrieved August 5, 2021, from <https://www.racialequityalliance.org/tools-resources/communication-tools/1-052018-gare-comms-guide-v1-1-2/>

M. Analysis of Transit DEI Communications Strategy — Literature review

Imagery

Imagery can be difficult to navigate in campaigns that address sensitive topics, such as race, discrimination, inequity and exclusivity. The Government Alliance on Race and Equity (GARE) suggests being “as thoughtful about... images as we are... [about] language.” To do so, GARE recommends the following:⁴

- Invest time and resources in selecting thoughtful imagery that conveys the right message.
- Consider using images rather than text to convey a particularly important point, as most audiences respond better to infographics.
- Avoid images with stereotypes and cultural appropriation.
- Be true to real communities by using authentic images. Resist the urge to select images of “diversity” if what is shown does not accurately reflect the makeup of the community.
- Beware of visual “tokenism” where one person of color is used as the “figure head” or focus of the image.
- Avoid whitewashing, including images of lighter-skinned people of color and/or “whitening” images through editing software.



General recommendations. In addition to the ACT strategy, the following are general strategies for effective messaging:

- Lead with shared values;
- Always utilize a message vision, a single-sentence statement that encapsulates the overarching goal of equity efforts;
- Balance data with detailed storytelling;
- Avoid negative or evaluative labels and generalizations, as they may lead to implicit bias;
- Be reflective about the positionality of the entity, ask for feedback from those with different perspectives on communications prior to dissemination;
- Be explicit when explaining the historical context of inequities and barriers;
- Embrace a culture of learning within the organization;
- Acknowledge that progress is gradual and must be earned;
- Make clear to the community how change will occur;
- Messaging should cast the organization as a character with a set tone (e.g., Cherriot as a “Bridge Builder,” who is visionary, hands-on, collaborative and adaptive); and
- Use plural “we” language.

⁴ Ibid.

M. Analysis of Transit DEI Communications Strategy — Cherriots efforts

Cherriots has implemented strategies to communicate with diverse audiences. For example, certain communications are in Spanish as well as English.

As of the writing of this report, Cherriots has minimal community communications or engagement programs specifically regarding diversity, equity and inclusion, other than the information about the Keen Independent study

Cherriots intends to use Keen Independent findings and recommendations to construct a new, effective communications strategy for DEI-related efforts.



M. Analysis of Transit DEI Communications Strategy — Other transit agencies

Analysis of DEI Communications in Oregon

Cherriots can also learn from the communications strategies used by public transit agencies in Oregon related to DEI efforts. Analysis includes the following:

- TriMet in the Portland area;
- Lane Transit District in the Eugene and Springfield area;
- South Metro Area Regional Transit in the Wilsonville area;
- Central Oregon Intergovernmental Council (also known as Cascades East Transit) in the counties of Deschutes, Crook and Jefferson; and
- Rogue Valley Transportation District in the Medford and Ashland area.



M. Analysis of Transit DEI Communications Strategy — Other transit agencies

TriMet

TriMet is a large, multimodal transportation agency that serves the greater Portland area. It is the most advanced transportation organization in the state in terms of internal and external equity efforts. The agency communicates its equity goals and progress through several means.

Website. Within the TriMet website, there is a dedicated equity section that outlines the agency’s approach, DEI-related goals, information about programs and the progress of each program. There is also a “Frequently Asked Questions” sections for each program.⁵

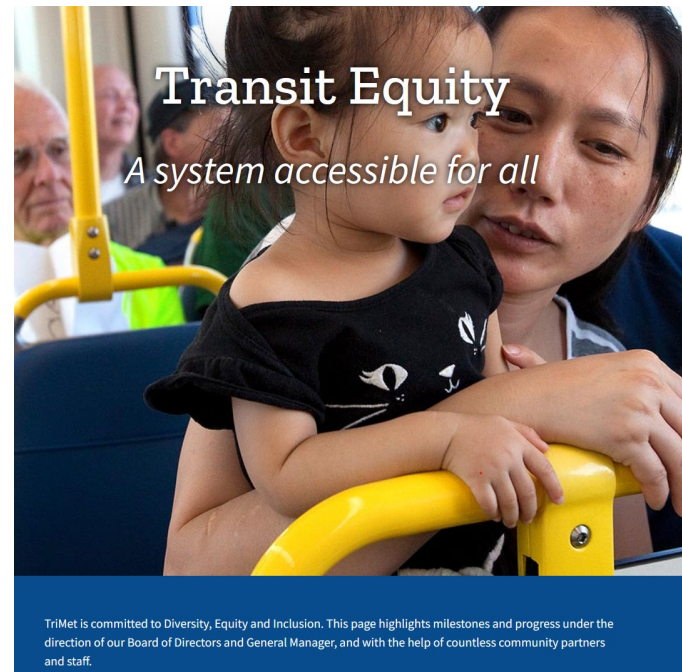
TriMet also shares equity-related developments and successes on an online blog. Both the website and the blog allow the agency to provide detailed information, rather than sound bites, to their audience. These are also spaces for audiovisual announcements.

Events. TriMet has a dedicated Transit Equity, Inclusion and Community Affairs Outreach Programs and Events Team that holds events to celebrate equity-related holidays and/or share the agency’s drive for fair and inclusive mobility. For example, in February 2021, the agency provided free rides to all in celebration of Rosa Parks Transit Equity Day. As explained by TriMet Board Member, “When people wonder why fares are not being collected on this day, we’ll be able to tell them that Rosa Parks is being honored. This is her birthday, and she’s the mother of the civil rights movement. She moved the country by use of a bus in a great social effort to bring about equity and equality.”⁶

⁵ TriMet. (n.d.). “Transit Equity: A system accessible for all.” Retrieved August 20, 2021, from <https://trimet.org/equity/index.htm>

Merchandise. TriMet shows its support of minority communities through merchandise. For example, one of the agency’s t-shirts celebrated LGBTQ Pride.

Social media. The agency is active on Twitter, Instagram and Facebook, with almost multiple posts per day. Many of these posts relate to changes in services or operations, hiring opportunities and promotions. However, all are done through a DEI lens. For example, individuals in photos and videos are noticeably diverse and ADA accessibility measures are highlighted.



⁶ KATU. (2021, Jan. 27). “TriMet to Offer Free Rides on Inaugural ‘Rosa Parks Transit Equity Day.’” Retrieved August 20, 2021, from <https://katu.com/news/local/trimet-to-offer-free-rides-on-inaugural-rosa-parks-transit-equity-day>

M. Analysis of Transit DEI Communications Strategy — Other transit agencies

Lane Transit District (LTD)

Lane Transit District is a bus transportation agency serving the Eugene and Springfield areas. While the District does have Equal Employment Opportunity (EEO), ADA and Title VI programs, other equity-related efforts are limited.

It communicates with the community through the following means.

Social media. LTD has an active Facebook account, however it does not have a Twitter or Instagram account. Much of the content on LTD’s Facebook page is related to service updates and COVID-19 protocols, with very little dedicated to equity.⁷

Bus Talk newsletter. The District publishes a monthly newsletter called, “Bus Talk,” which informs readers of new developments at the agency and community events.⁸

Email lists. The District also stays in contact with riders and the community through an email list, which individuals can sign up for on the agency’s website.

Events. While LTD does not host equity-related events, it does advertise and provide transportation to such events. For example, in August 2021, the agency advertised Pride in the Park, a celebration of the local LGBTQ community in the Bus Talk Newsletter, along with rider instructions on how to attend.⁹

⁷ Lane Transit District. (2021). “Lane Transit District.” Facebook. Retrieved August 20, 2021, from <https://m.facebook.com/LaneTransit/>

⁸ Lane Transit District. (2021, Aug.). “August Bus Talk.” Retrieved August 20, 2021, from <https://www.ltd.org/bus-talk/>

M-1. Cover of Lane Transit District’s monthly newsletter “Bus Talk”



Source: Lane Transit District. (2021, Aug.). “August Bus Talk.” Retrieved August 20, 2021, from <https://www.ltd.org/bus-talk/>

⁹ Lane Transit District. (2021, Aug.). “August Bus Talk.” Retrieved August 20, 2021, from <https://www.ltd.org/bus-talk/>

M. Analysis of Transit DEI Communications Strategy — Other transit agencies

South Metro Area Regional Transit (SMART)

SMART is a bus transit system that serves Wilsonville and the surrounding area, including some communities adjacent to Cherriots' service area. SMART has very few public DEI efforts.

Website. The agency's website incorporates equity through the use of Spanish language translations and explanation of its Title VI policy. However, other information related to equity is limited.

Social media. SMART is active on Instagram and Facebook. Both promote service change, safety warning and COVID-19 information, none of which directly relate to DEI. However, the agency uses Facebook to promote other local organizations' equity initiatives, such as Heart of the City's "Gear Up for School" school supply event and the Agile Mile scholarship for undergraduate students of color.¹⁰

Central Oregon Intergovernmental Council (Cascades East Transit)

Cascades East Transit connects Bend, La Pine, Madras, Prineville, Redmond, Sisters and Warm Springs in Central Oregon. Cascades East Transit uses the following communications strategies.

Blog. The agency updates a blog on its website. Of the posts available for review, none relate to DEI.

Website. Cascades East Transit does not have a dedicated space on its website for DEI efforts, however the agency does have a "Ride Assist" tab for its paratransit program, which helps transport people with disabilities.

Social media. The agency actively uses Facebook and Twitter and intermittently uses Instagram and. Posts to those platforms are almost entirely related to services, and none regard DEI.

Newsletter. Cascades East Transit has an email newsletter sent to interested individuals and groups.

M-2. SMART publicization of Heart of the City's "Gear Up for School" event on its Facebook page in Spanish



Source: SMART. (2021, Aug. 4). "Heart of the City event." Facebook. Retrieved August 23, 2021, from <https://www.facebook.com/RideSMARTtransit/photos/pcb.10159416293479731/10159416291079731/?type=3&theater>

¹⁰ SMART. (2021). "SMART Transit, Wilsonville." Facebook. Retrieved August 23, 2021, from <https://m.facebook.com/RideSMARTtransit/>

M. Analysis of Transit DEI Communications Strategy — Other transit agencies

Rogue Valley Transportation District (RVTD)

RVTD is a bus and paratransit service located in Jackson County. It serves the cities of Ashland, Medford, White City, Phoenix, Jacksonville, Talent and Central Point.

RVTD has had limited public- or community-facing DEI related efforts, events and statements. For example, the agency does not utilize its website or blog, email lists, hold events or sell merchandise related to this issue. Noticeably, the agency’s website does not have an equity page, nor any mention of EEO compliance. The agency does have a dedicated page for the Ashland Connector, an on-demand van service that is ADA-accessible and provides transportation to those in need at a lower cost than ride hailing services, such as Uber and Lyft, thus ADA is mentioned.¹¹

In the few cases RVTD has made DEI efforts, it has utilized the following communications platforms:

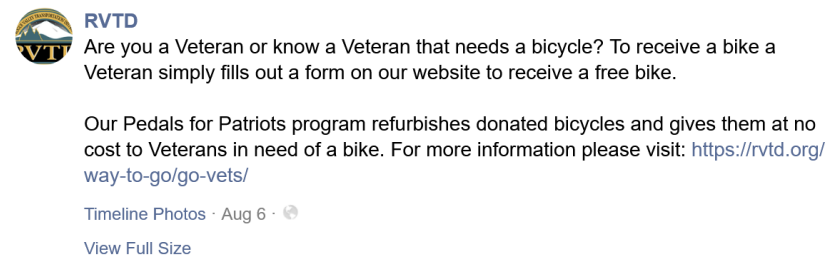
Social media. RVTD is active on Facebook and Twitter, where it publicizes service and fare changes, as well as transit-related developments.

The agency has promoted a limited number of events that are equity-related, including the bicycle event displayed in Figure M-3.

Events. RVTD occasionally holds equity-related events for disadvantaged groups. Events appear to be focused on veterans, with none from 2020 to 2021 mentioning racial or ethnic minorities, disabled peoples or low-income individuals.

¹¹ Kaplan, L. (2021, Mar. 11). “Spotlight: Ashland Connector is a Success.” Mail Tribune, Ashland Edition. Retrieved August 23, 2021, from

M-3. RVTD equity-related Facebook post



Source: Rogue Valley Transportation District. (2021, Aug. 6). “RVTD.” Facebook. Retrieved August 23, 2021, from https://m.facebook.com/rideRVTD/photos/a.482223748472104/4742170379144065/?type=3&source=48&__tn__=EH-R

<https://www.ashlandtidings.com/lifestyle/2021/03/11/spotlight-ashland-connector-is-a-success/>

M. Analysis of Transit DEI Communications Strategy — Additional strategies for Cherriots

Additional DEI-focused communications strategies for Cherriots to consider include the following.

Audience

The following strategies relate to Cherriots' audiences.

Assessment. Cherriots might conduct a communications assessment to identify which external audiences, including riders, potential riders and community stakeholders, are reached and are not reached by current communications efforts. Demographic details should be collected about these groups so future campaigns can be customized for maximum effectiveness.

Language. Cherriots' 2020 Title VI Program examined languages spoken by residents of Marion and Polk counties who have limited English proficiency (defined in U.S. Census as individuals ages 5 and older who speak English less than "very well"). In the local area, most of those with limited English proficiency speak Spanish (about 30,000 people), and Cherriots has made efforts to communicate with these individuals in Spanish. There is also a small population of Russian-speaking residents who have limited English language abilities (about 1,500).

Tools and Platforms

The following strategies relate to outreach tools and platforms.

Consider peer agency efforts. Peer transit agencies' communications efforts can be reviewed for potential adoption or adaptation.

Attend community mobility events. When possible, given the COVID-19 pandemic, Cherriots could participate in more in-person local community events related to DEI and mobility, such as the annual Capital Pride Parade, advocacy events at the State Capitol and Oregon Black Pioneers celebrations.

Develop promotion materials. Cherriots might create more branded promotional materials to be given out at community events or sold on its website (e.g., t-shirts).

Utilize "News" page. The organization could more regularly use the Cherriots.org "News" page to publicize DEI-related events, developments and efforts (at least monthly).

Expand social media use. Cherriots could share information about DEI efforts across all social media platforms (i.e., Facebook, Twitter and Instagram). Similar to the "News" updates, posts on this topic should be routine.

Newsletter. Cherriots could share DEI-related news in the agency newsletter. Consider creating a special section that highlights developments, plans and successes. Cherriots' newsletter can be made more accessible by having a PDF copy available for download directly from the Cherriots.org website, rather than require email sign-up.

M. Analysis of Transit DEI Communications Strategy — Additional strategies for Cherriots

Message Creation

When developing new messaging:

- Generate and consistently use a singular message vision;
- Include data alongside narrative storytelling;
- Avoid negative or evaluative labels and generalizations;
- Ask for feedback and review of materials from a diverse panel prior to dissemination;
- Use the plural “we” language;
- Embrace a culture of learning within the organization externally and internally;
- Acknowledge that progress is gradual and must be earned; and
- Make clear to the community how change will occur.

Ask for stakeholder feedback and review of any images used in DEI campaigns to ensure they are free of tokenism, stereotypes or other harmful imagery.

Evaluate Effectiveness

When examining the success of a communications campaign, Cherriots should evaluate whether its DEI messages have reached intended audiences, including diverse groups.

APPENDIX N. Research on Transit-Related Citizen Advisory Groups

This document examines how citizen advisory groups operate and advise public transit agencies. Topics discussed include:

- Background research on community advisory groups;
- Common barriers;
- Best practices and overcoming solutions; and
- Citizen advisory groups in the Pacific Northwest.

Background Research

Many citizen advisory groups for public agencies were created in the 1970s when municipal planners began to emphasize community members' roles in local planning. Advisory groups were adopted by the public transit industry as transit network designers and leaders recognized the need for rider feedback, particularly when revising services, routes, fares and operations.

Eventually, these groups were found to be “critical in understanding the disconnect between federal mandates, Municipal Planning Organizations, and an equitable distribution of transportation services in many urban areas,” and used widely by public transportation organizations across the United States.¹

Advisory groups vary in size, name and organization. Some are small (6 to 8 members), while others are large (30 to 50 members); some are called, “Community Advisory Committees,” and others are called “Transportation Advisory Groups”; and bylaws vary according to context, community culture and the geographic location of the agency.

Most groups examined by Keen Independent were found to formally emphasize diversity in membership through bylaws, which dictate the makeup of a group, and include racial and ethnic minorities, students, seniors, disabled people and other key groups within the community.²

¹ Cipkar, S. (2015). “Moving Towards Equity? Citizen Participation in Public Transit Planning in the Detroit Metropolitan Region.” Masters Thesis. University of Windsor. Windsor, Ontario, Canada. Retrieved August 19, 2021, from <https://scholar.uwindsor.ca/etd/5322>

² Sutcliffe, J. & Cipkar, S. (2017). “Citizen Participation in the Public Transportation Policy Process: A comparison of Detroit, Michigan, and Hamilton, Ontario.” *Canadian Journal of Urban Research* 26(2): 33-51.

N. Research on Transit-Related Citizen Advisory Groups — Background

Agencies have been found to benefit from citizen advisory groups in many ways:

- Agencies can obtain regular external feedback on a variety of operational changes;
- These groups help agencies obtain local resident buy-in for needed changes. Buy-in can be particularly important when related to agency budgets that can be impacted by political bills and measures; and
- Advisory groups help to foster cooperation between agency leaders and the community the agency serves.³

These groups facilitate community collaboration by providing:

- Extended and continuous interaction between the agency and community members;
- A space for in-depth conversations about topics that allow for detailed, technical information to be shared;
- Educational opportunities for community members and agency staff to learn from different perspectives; and
- The development of collaborative relationships and problem-solving between intern and external stakeholders.⁴

These types of groups are described as the “ideal way to involve the public in addressing issues that require expertise and sustained community attention over time.”⁵

³ Cipkar, S. (2015). “Moving Towards Equity? Citizen Participation in Public Transit Planning in the Detroit Metropolitan Region.” Masters Thesis. University of Windsor. Windsor, Ontario, Canada. Retrieved August 19, 2021, from <https://scholar.uwindsor.ca/etd/5322>

⁴ National Academies of Sciences, Engineering and Medicine. (2010). “Effective Use of Citizen Advisory Committees for Transit Planning Operations.” The National Academies Press. DOI: <https://doi.org/10.17226/14388>.

⁵ Ibid.

N. Research on Transit-Related Citizen Advisory Groups — Common barriers

Creating and sustaining effective citizen advisory groups can be challenging. Some of these barriers are systemic, while others are contextual.

For example, research has found that “regardless of the type, amount, and quality of participation, the representativeness of the group, or the self-determination of the group itself, transit decision-making can be plagued with historic and contested positions as to how money should be spent to build a regional system.” Some groups have a scope of action that is “too narrow ... to have a substantial effect on the policy process,” such as limited ability to impact decision-making or an absence of effective communication channels with agency staff capable of making needed changes (e.g., board members, leadership, Human Resource managers, Operations managers).⁶

Research has found that agencies choose not to have advisory committees for three primary reasons:

1. Agency leaders have found other engagement methods that are more effective than community advisory committees;
2. The agency is not planning for any changes to service or capital improvements, and therefore do not believe they require regular community input; and
3. The agency has determined that advisory groups require too much time, staff and other resources.⁷

⁶ Sutcliffe, J. & Cipkar, S. (2017). “Citizen Participation in the Public Transportation Policy Process: A comparison of Detroit, Michigan, and Hamilton, Ontario.” *Canadian Journal of Urban Research* 26(2): 33-51.

Agencies can also encounter the following issues:

- **Exclusivity.** Due to the limited size of most committees, it is difficult for groups to represent all of the perspectives within a community. Therefore, the viewpoints of the committee may be skewed towards a certain demographic.
- **Transparency.** If group discussion and information are not shared with the public, the group can appear closed-off and possibly even manipulated by the agency into following agency desires, rather than community needs.
- **Social dynamics.** Some groups may have members with opposing personalities, which can result in group conflict, absenteeism, withdrawal and/or complacency.
- **Resources.** Groups may require extensive agency resources (e.g., staff time and funding).
- **Size.** Advisory groups with 30 or so members may not allow each member the time and resources to properly participate in meetings.⁸

⁷ National Academies of Sciences, Engineering and Medicine. (2010). “Effective Use of Citizen Advisory Committees for Transit Planning Operations.” The National Academies Press. DOI: <https://doi.org/10.17226/14388>.

⁸ Ibid.

N. Research on Transit-Related Citizen Advisory Groups — Common barriers

Additionally, despite the social and political impact citizen advisory groups have, research has found that most members do not view themselves as activists or agents of community change. Consequently, they may not “boldly and directly advocate for their [representative] neighborhoods and for themselves.”⁹

Understanding systemic and contextual barriers and keeping them in mind when carrying out advisory group work are the first steps towards overcoming these issues. Groups and group members can preemptively address these potential problems before they are actualized. The next section details best practices and additional strategies to overcome challenges.

⁹ Cipkar, S. (2015). “Moving Towards Equity? Citizen Participation in Public Transit Planning in the Detroit Metropolitan Region.” Masters Thesis. University of Windsor. Windsor, Ontario, Canada. Retrieved August 19, 2021, from <https://scholar.uwindsor.ca/etd/5322>

N. Research on Transit-Related Citizen Advisory Groups — Examples of other advisory groups

There is no specific format, size or group organization found to be more effective than others within the realm of citizen advisory groups. However, research has pinpointed certain elements that increase the group's chances of success and effectiveness. The first element is to ensure that group members have a clear understanding of:

- Group purpose;
- How the group functions (e.g., bylaws and norms);
- Group goals, short- and long-term;
- Member responsibilities and role;
- Meeting schedule; and
- Group's authority to make decisions within the agency.¹⁰

Informed members have the ability to set and exceed expectations and stem any frustrations. Group information can be promoted through written and verbalized protocols, which can be detailed via bylaws, committee agreements and meetings.¹¹

Outreach

Research has found that a formal requirement for the inclusion of diverse community perspectives within committees is a best practice. These requirements are typically set in committee bylaws (as seen with Cherriot's Citizens Advisory Committee). Stipulations can be made for groups to conduct outreach to minority groups — with a particular focus on those with limited English language ability.¹²

¹⁰ Gardenswartz, L. & Rowe, A. (2008). *Contemporary Leadership and Intercultural Competence*, ed. Moodian, M. Thousand Oaks, CA: SAGE Publications.

¹¹ National Academies of Sciences, Engineering and Medicine. (2010). "Effective Use of Citizen Advisory Committees for Transit Planning Operations." The National Academies Press. DOI: <https://doi.org/10.17226/14388>.

Innovation

Some agencies go beyond these conventions when managing and/or forming citizen advisory groups. Innovative practices observed include:

- Utilizing a larger group size to include more diverse voices (up to 20), but not too large where individuals go unheard;
- Actively recruiting members with disabilities;
- Using a multilingual outreach team to gather community input from non-English language speakers;
- Allowing members to serve for the duration of a particular project or plan, rather than a set amount of calendar years;
- Producing a report (every 2 to 3 years) outlining the group's activities and setting future goals; and
- Allowing members to serve as spokespersons for agency efforts impacted by the advisory group.¹³

¹² Ibid.

¹³ Ibid.

N. Research on Transit-Related Citizen Advisory Groups — Examples of other advisory groups

Transit Agencies in the Pacific Northwest

Many transit agencies and other public entities in the Pacific Northwest use community advisory groups. This section introduces several.

Sunset Empire Transportation District (SETD). Located in Clatsop County, Oregon, SETD has a Transportation Advisory Committee with 9 members (8 community members and one SETD Board representative). The committee meets at least two times per year to provide “recommendations to the SETD Board of Commissioners regarding transportation priorities funded through various funding streams including federal and state programs.”¹⁴

Skagit Transit. Located in Skagit County, Washington, Skagit Transit has a Community Advisory Committee of 12 individuals who meet monthly to advise the agency’s Board of Directors (specific topics were not cited on the Committee’s website).¹⁵

Intercity Transit. Located in Olympia, Intercity Transit has a Community Advisory Committee, a 20-member group that meets monthly to discuss topics that include “Dial-A-Lift policies, service changes, strategic plans, the budget, fare structures, transit amenities and other issues.”¹⁶

Pierce Transit. Located in Lakewood, Washington, Pierce Transit has a Community Transportation Advisory Group made up of 9 members who

provide input to the agency’s Board of Commissioners on topics including service changes, long-term planning, budgets, fare structure, transit amenities, accessibility and innovative projects.¹⁷

Kitsap Transit. Located in Kitsap County, Washington, Kitsap Transit has a Citizens’ Advisory Committee that meets monthly to advise the agency Board and administration on services, operations quality, budgets, fares, public information and marketing strategies.¹⁸

Spokane Transit Authority. Located in Spokane, Washington, Spokane Transit Authority has a Citizen Advisory Committee of 9 members who meet five times per year. This committee is tasked with “ensur[ing] accountability of the organization's actions, act[ing] as an educational arm of the organization to reach out to the public and act[ing] as a focused, educated forum for public input and feedback to the organization and represent[ing] a wide range of stakeholders and transit service employees.”¹⁹

It is important to note that TriMet, one of the largest transit agencies in Oregon, does not have a conventional advisory committee. However, the agency does have the HB 2017 Transit Advisory Committee, a group of local residents who advise the agency on the allocation of funds from Oregon House Bill 2017.²⁰

¹⁴ NW Connector. (n.d.). “Transportation Advisory Committee.” Retrieved August 18, 2021, from <https://www.nworegontransit.org/advisory-boards-setd/>

¹⁵ Skagit Transit. (n.d.). “CAC.” Retrieved August 18, 2021, from <https://www.skagittransit.org/about-us/cac/>

¹⁶ Intercity Transit. “Community Advisory Committee.” Retrieved August 18, 2021, from <https://www.intercitytransit.com/agency/community-advisory-committee>

¹⁷ Pierce Transit. (n.d.). “CTAG: Community Transportation Advisory Group.” Retrieved August 18, 2021, from <https://www.piercetransit.org/community-transportation-advisory-group/>

¹⁸ Kitsap Transit. (n.d.). “Citizens’ Advisory Committee.” Retrieved August 18, 2021, from <https://www.kitsaptransit.com/agency-information/citizen-advisory-committee>

¹⁹ Spokane Transit Authority. (n.d.). “Citizen Advisory Committee.” Retrieved August 18, 2021, from <https://www.spokanetransit.com/about-sta/citizen-advisory-committee>

²⁰ TriMet. (n.d.). “HB 2017 Transit Advisory Committee.” Retrieved August 18, 2021, from <https://trimet.org/meetings/hb2017/index.htm>

N. Research on Transit-Related Citizen Advisory Groups — Examples of other advisory groups

Advisory Groups for Cities and Counties

As mentioned earlier, citizen advisory groups are commonly used by public agencies, such as municipalities and counties, to obtain extended feedback and advice from local residents. These groups can be helpful to examine when learning about how public citizen advisory groups operate. The following are some transportation-related examples.

- **The City of Lake Oswego, Oregon.** The City of Lake Oswego has a Transportation Advisory Board comprised of 8 community members who meet bi-monthly. The Board advises on the implementation of neighborhood traffic management programs and updating the city-wide transportation system plan.²¹
- **Clackamas County, Oregon.** Clackamas County has a 15-member Community Road Fund Advisory Committee, which is comprised of local community members who work to determine which capital congestion relief projects should be prioritized, funded and constructed.²²
- **The City of Everett, Washington.** The City of Everett has a monthly Transportation Advisory Committee made up of volunteer citizens who advise City staff and leaders on transit services, transportation planning, traffic safety and traffic issues.²³
- **County of Benton, Washington.** The County of Benton is advised by the Accessible Community Advisory Committee, a 10-member committee that addresses issues of accessibility across all county services, including mobility. The Committee meets monthly.²⁴

²¹ Lake Oswego. (n.d.). "About the Transportation Advisory Board." Retrieved August 18, 2021, from https://www.ci.oswego.or.us/boc_tab/about-transportation-advisory-board

²² Clackamas County. (n.d.). "Community Road Fund Advisory Committee." Retrieved August 18, 2021, from <https://www.clackamas.us/transportation/crfac>

²³ City of Everett. (n.d.). "Transportation Advisory Committee." Retrieved August 18, 2021, from <https://everettwa.gov/691/Transportation-Advisory-Committee-TAC>

²⁴ County of Benton. (n.d.). "Accessible Community Advisory Committee." Retrieved August 18, 2021, from <https://www.co.benton.wa.us/pview.aspx?id=21078&catid=45>

APPENDIX O. Literature Review

To better understand the context of the region Salem Area Mass Transit District (also known as Cherriots) serves, as well as how the public transit industry approaches diversity, equity and inclusion, Keen Independent conducted a review of academic and non-academic literature. This appendix summarizes the available literature in the following sections:

- A. Historical context in Oregon;
- B. Transportation and mobility in the Salem area;
- C. Diversity, equity and inclusion in the transit industry; and
- D. Diversity, equity and inclusion efforts to date at Cherriots.

A. Historical Context in Oregon and Salem

Discrimination in Oregon reaches back to the establishment of Oregon as a state in 1859.¹ As the capital, the City of Salem is not and was not detached from biased legislation or behaviors in other regions of the state. This section provides a broad overview of discrimination on a state- and local-level to give context to the current issues in the area. Keen Independent adapted a previous report for Oregon Department of Transportation to provide examples of events, acts and policies that have negatively affected marginalized individuals, people of color, the LGBTQ community and more.

It is important to note that societal and structural discrimination and exclusion are not limited to Oregon or the Salem area. Instead, these events and actions are part of a national discussion on race, ethnicity, gender, sexuality and more. Examples provided below are not intended as a comprehensive analysis of all groups in Oregon.

¹Bancroft, H. (1888). History of Oregon, Vol. II 1848-1888. San Francisco, CA: The History Company, Publishers.

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Examples of historic discrimination. The following provides just a few examples of discrimination experienced by some minority groups:

LGBTQ individuals. Throughout its history, Oregon has had more anti-LGBTQ ballot measures than any other state in the nation.² This is in part due to the State lacking non-discrimination on the basis of sexual orientation or gender identity legislation until 2007.³ In 2007, the Governor signed the Oregon Equality Act, which prohibits discrimination against LGBTQ individuals in employment and other public accommodations.⁴

Compared to the rest of the state, Salem has been progressive in its treatment of LGBTQ individuals. In addition to developing local ordinances which protect the LGBTQ community, the City also provides transgender-inclusive health insurance to employees and services to at-risk LGTBQ community members. The City's successful prioritization of eliminating LGBTQ bias and discrimination resulted in it receiving an "All-Star" designation in 2017 and 2020 from the Human Rights Campaign Foundation. Salem received an inclusivity score of 90 in 2020.

For reference, the national average inclusivity score is 64 and the average score of all cities in the State of Oregon is 74.^{5,6}

African Americans. In 1859, Oregon joined the Union with a distinction: it was the only state with an exclusionary clause in its constitution that prohibited African Americans from living within its borders and owning property. The exclusionary laws in Oregon remained intact even after federal passage of the Fourteenth Amendment.⁷ Legislative racism against African Americans continued into the 20th century when the State refused to ratify the Fifteenth Amendment, the right for African Americans to vote, until 1959 (an amendment that was federally adopted in 1870).⁸ It was not until changes to the state constitution were made in 2002 that the legal vestiges of racial discrimination were completely removed from Oregon's state constitution.

² ACLU Oregon. (n.d.). LGBTQ+ Rights. Retrieved on June 2, 2021, from <https://aclu-or.org/en/issues/lgbtq-rights>

³ City of Salem. (2020, Dec. 3). Salem Named All-Star City in LGBTQ Equality by Human Rights Campaign Foundation. Retrieved May 28, 2021, from <https://www.cityofsalem.net/Pages/salem-named-all-star-city-in-lgbtq-equality-by-human-rights-campaign-foundation.aspx>

⁴ ACLU Oregon. (n.d.). LGBTQ+ Rights. Retrieved on June 2, 2021, from <https://aclu-or.org/en/issues/lgbtq-rights>

⁵ City of Salem. (2020, Dec. 3). Salem Named All-Star City in LGBTQ Equality by Human Rights Campaign Foundation. Retrieved May 28, 2021, from <https://www.cityofsalem.net/Pages/salem-named-all-star-city-in-lgbtq-equality-by-human-rights-campaign-foundation.aspx>

⁶ Woodworth, W. (2017, Oct. 19). Salem Ranks Highest Among Oregon Cities for LGBTQ Equality. The Statesman Journal. Retrieved May 28, 2021, from <https://www.statesmanjournal.com/story/news/2017/10/19/salem-ranks-highest-among-oregon-cities-lgbtq-equality/781344001/>

⁷ Rector, E. (2010, May 16). Looking back in order to move forward: An often untold history affection Oregon's past, present and future. Portland, OR: Oregon Center for Education Equality. Retrieved June 16, 2021, from https://www.osba.org/Resources/Article/Improving_Education/CFEE_Timeline.aspx

⁸ Samuels, O. (2016). The Racist History of Portland, the Whitest City in America. Retrieved on June 2, 2021, from <https://www.theatlantic.com/business/archive/2016/07/racist-history-portland/492035/>

O. Literature Review

There is a long history of exclusionary practices aimed at African Americans in Oregon concerning employment, union membership, marriage, education, housing and many other aspects of daily life.^{9, 10, 11} Examples from the past 60 years include redlining in low-income African American communities and refusing home loans for those who aim to live elsewhere,^{12, 13} prominence of the Ku Klux Klan in the 1920 and the Klan's influence on local politics,¹⁴ unofficial "Sundown Laws" in certain Oregon communities,¹⁵ and disparities caused by environmental racism and economic displacement of families in the Portland area.^{16, 17}

For reference, as of 2019, 2.2 percent of the State's population and 1.4 percent of Salem's population identifies as Black or African American, roughly 93,000 and 2,400 people respectively.¹⁸

Asian Americans. Oregon is home to a large Asian American community, comprised of diverse immigrants and native-born populations. There are approximately 207,000 Asian Americans in the State (approximately 4.9% of the State's population).¹⁹ Additionally, roughly 2.6 percent of the City of Salem's population identifies as Asian.²⁰ These groups, particularly the Chinese and Japanese, have experienced extended discrimination.

Chinese miners, merchants and laborers arrived in Oregon in the late 19th century to capitalize on economic opportunities in the area. By statehood, there was a relatively large population of Chinese immigrants in State. From 1882 to 1943, the State purposefully enacted law and policy that excluded Chinese people from a wide range of rights, including naturalization, education at public schools, interracial marriage, certain professions, voting, holding office, serving on juries and more.²¹

⁹ Nokes, G. (2015). Black exclusion laws in Oregon. Retrieved June 16, 2021, from the Oregon Encyclopedia:

http://oregonencyclopedia.org/articles/exclusion_laws/#.VeYdPPIVhBc

¹⁰ Rector, E. (2010, May 16). Looking back in order to move forward: An often untold history affection Oregon's past, present and future. Portland, OR: Oregon Center for Education Equality. Retrieved June 16, 2021, from

https://www.osba.org/Resources/Article/Improving_Education/CFEE_Timeline.aspx

¹¹ Shaw, P. (2012, November 28). Why aren't there more black people in Oregon? Retrieved June 16, 2021, from <http://www.portlandoccupier.org/2012/11/28/why-arent-there-more-black-people-in-oregon>

¹² Oh, S., & Wang, X. (2018) Urban rail transit provides the necessary access to a metropolitan area: A case study of Portland, Oregon, USA. *Urban Rail Transit* 4(4), 234-248.

¹³ Samuels, O. (2016). The Racist History of Portland, the Whitest City in America. Retrieved on June 2, 2021, from <https://www.theatlantic.com/business/archive/2016/07/racist-history-portland/492035/>

¹⁴ Ibid.

¹⁵ Rector, E. (2010, May 16). Looking back in order to move forward: An often untold history affection Oregon's past, present and future. Portland, OR: Oregon Center for Education Equality. Retrieved June 16, 2021, from

https://www.osba.org/Resources/Article/Improving_Education/CFEE_Timeline.aspx

¹⁶ Stround, E. (1999). Troubled Waters in Ecotopia: Environmental Racism in Portland, Oregon. *Radical History Review* 74, 65-95.

¹⁷ Goodling, E., Green, J., & McClintock, N. (2015). Uneven development of the sustainable city: Shifting capital in Portland, Oregon. *Urban Geography* 36(4), 504-527.

¹⁸ United States Census Bureau. (2021). "Quick Facts: Oregon; Salem City, Oregon." Retrieved June 16, 2021, from

<https://www.census.gov/quickfacts/fact/table/OR,salemcityoregon/PST045219>

¹⁹ Ibid.

²⁰ Ibid.

²¹ Lee, D. (2021). Chinese Americans in Oregon. Retrieved June 2, 2021, from https://www.oregonencyclopedia.org/articles/chinese_americans_in_oregon/#.YLF3maFIDmE

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While the federal Chinese Exclusion Act encouraged Oregon's own law, another impetus for anti-Chinese legislation was fear of business competition.²² Negative social sentiment toward Chinese residents brought tensions and violence, including the Deep Creek Massacre of 34 Chinese miners in 1887, a crime for which no one was punished.²³

Tellingly, Oregon's Cantonese Chinese population dropped from 10,390 in 1900 to 2,086 in 1940.²⁴ Despite the repeal of the federal Chinese Exclusion Law in 1943, the State's Chinese population continued to stagnate due to other discriminatory legislation, such as the 1952 McCarran-Walter Act. As legislation and immigration quotas expanded, the Chinese and other Asian American populations increased significantly in Oregon.²⁵ In 2018, individuals of Chinese descent made up the largest group among Asian American-Pacific Islanders in the State with 57,005 individuals.²⁶

The influx of Japanese workers in Oregon largely began after prohibition of Chinese labor to the United States in 1882. Like their Chinese counterparts, Japanese communities were highly segregated from white communities and intermarriage was forbidden.²⁷ In 1923, Oregon law makers, influenced by members of the Ku Klux Klan, passed multiple laws to restrict Japanese Americans and other people of color.²⁸ These included the Alien Land Law and the Oregon Business Restriction Law.²⁹

During World War II, most Japanese living in Oregon — as with most throughout the United States — were placed in internment camps. After the war ended, discriminatory factions in Oregon campaigned to discourage the return of Japanese community members. However, 70 percent of the 4,000 relocated Japanese individuals returned to find their homes vandalized, business boycotted and property lost.^{30, 31} Federal reparations were provided to interned Japanese in 1988 after the passing of the Civil Liberties Act.³²

²² Chung, S. F. (2011). *In pursuit of gold: Chinese American miners and merchants in the American west*. Chicago, IL: University of Illinois Press; Grantham, A. (2015). *Expulsion of Chinese from Oregon City, 1886*. Retrieved June 16, 2021 from http://oregonencyclopedia.org/articles/expulsion_of_chinese_from_oregon_city_1886/#.Ve9nbflVhBc

²³ Lee, D. (2021). *Chinese Americans in Oregon*. Retrieved June 2, 2021, from https://www.oregonencyclopedia.org/articles/chinese_americans_in_oregon/#.YLF3maFIDmE

²⁴ Ibid.

²⁵ Ibid.

²⁶ APVA Vote. (2018). *Population Facts: Oregon*. Retrieved June 2, 2021, from <https://www.google.com/url?sa=t&rct=j&q=&esrc=s&source=web&cd=&cad=rja&uact=8&ved=2ahUKewiZluHK9vnwAhWSOnOKHWffAWYQFjARegQIFxAD&url=https%3A%2F%2Fwww.apivavote.org%2Fsites%2Fdefault%2Ffiles%2FOR-2018.pdf&usg=AOvVaw3L0AqNIs32kl3yHUAhTE2C>

²⁷ Katagiri, G. (2015). *Japanese Americans in Oregon*. Retrieved June 16, 2021, from http://oregonencyclopedia.org/articles/chinese_americans_in_oregon/#.VehOCPIVhBd

²⁸ Rector, E. (2010, May 16). *Looking back in order to move forward: An often untold history affection Oregon's past, present and future*. Portland, OR: Oregon Center for Education Equality. Retrieved June 16, 2021, from https://www.osba.org/Resources/Article/Improving_Education/CFEE_Timeline.aspx

²⁹ Ibid.

³⁰ Rector, E. (2010, May 16). *Looking back in order to move forward: An often untold history affection Oregon's past, present and future*. Portland, OR: Oregon Center for Education Equality. Retrieved June 16, 2021, from https://www.osba.org/Resources/Article/Improving_Education/CFEE_Timeline.aspx

³¹ Collisson, C. (2015). *Japanese American Wartime Incarceration in Oregon*. Retrieved June 15, 2021, from http://oregonencyclopedia.org/articles/japanese_internment/#.VeYxcPIVhBc

³² Portland Chapter of the Japanese American Citizens League. (n.d.). *About*. Retrieved June 2, 2021, from <https://www.pdxjacl.org/about/>

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In 2020, the COVID-19 pandemic in tandem with political and economic competition with China contributed to a rise in anti-Asian sentiment. Nationally, 3,800 bias crimes against Asian Americans were recorded by Stop AAPI Hate from March 2020 to March 2021. Forty of these crimes occurred in Oregon.³³ Additionally, 99 reports by Asian Americans were filed with the Oregon Department of Justice regarding bias and discrimination from January 2020 to March 2021. These included two physical attacks, one of which was on a student at Willamette University in Salem.³⁴

Mexican Americans. Due to the lack of a workforce, industries across the United States encouraged Mexican workers to immigrate during World War I, resulting in one million Mexican national entering the United States from 1910 to 1920.³⁵ Oregon's railroad and agricultural industries benefited from these workers.³⁶ By 1930, there were 1,568 residents of Mexican descent in the State.³⁷ However, U.S. policies changed during the Great Depression, and many Mexican nationals and Mexican American citizens were deported. Because of "whites-only" employment policies and other discrimination during the Great Depressions, the only jobs available to many Latinos was "stoop labor," hard agricultural work.

Despite these hardships, the Latino population in the State of Oregon continued to grow. By the 1980s, 2.5 percent of the State population identified as Latino, a number that has continued to increase. Currently, there are five cities in the State with majority Latino populations (Gervais, Boardman, Nyssa, Woodburn and Cornelius). The 2019 Census estimates found that Latinos comprise roughly 13.4 percent of the State population and 23 percent of the City of Salem's population.³⁸ Despite this growth, Latinos have continued to face bias and discrimination. For example, in the 1990s, legislators attempted to pass law that denied rights to undocumented immigrants from Mexico, as well as an English-only law that unfairly disadvantaged those who lack English language skills.³⁹

Indigenous peoples. The nation as a whole and Oregon have a history marked by the killing and dislocation of indigenous peoples. Federal policy against tribal self-determination initiated after World War II has had a particular impact on the state, where a total of 62 tribes and bands were "terminated," more than one-half of the total terminated tribes in the country. Termination, which ended the protective federal trust status of indigenous people, has had severe negative effects on

³³ Ramakrishnan, J. (2021, March 22). Around Oregon: Asian American leaders in Oregon react to Atlanta shootings. Salem Reporter. Retrieved May 28, 2021, from <https://www.salemreporter.com/posts/3868/around-oregon-asian-american-leaders-in-oregon-react-to-atlanta-shootings-i-am-scared-for-our-community>

³⁴ Hamada, J & Holt, K. (2021, March 17). Opinion: A call to community amid uptick in anti-Asian crime and harassment. The Oregonian. Retrieved May 28, 2021, from <https://www.oregonlive.com/opinion/2021/03/opinion-a-call-to-community-amid-uptick-in-anti-asian-crime-and-harassment.html>

³⁵ Garcia, J. (2021). Latinos in Oregon. Retrieved June 2, 2021, from https://www.oregonencyclopedia.org/articles/hispanics_in_oregon/#.YLfg9aFIDmE

³⁶ Ibid.

³⁷ Ibid.

³⁸ United States Census Bureau. (2021). "Quick Facts: Oregon; Salem City, Oregon." Retrieved June 16, 2021, from <https://www.census.gov/quickfacts/fact/table/OR,salemcityoregon/PST045219>

³⁹ Garcia, J. (2021). Latinos in Oregon. Retrieved June 2, 2021, from https://www.oregonencyclopedia.org/articles/hispanics_in_oregon/#.YLfg9aFIDmE

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indigenous peoples in Oregon.^{40, 41} Tribal land and resources were sold at minimal rates, particularly those with timberlands; tribes lost sovereignty and federal recognition; individuals were forced to assimilate into “mainstream” white culture; and laws prohibited enrollment in tribes, leading to a drop in enrolled tribal populations.⁴²

The City of Salem’s early history, too, is marred by discrimination and conflicts with indigenous people, particularly with the Kalapuyan, Klamath and Wascoe tribes. As white pioneers “settled” lands in the mid-19th century, events such as the 1846 attack in the Salem Hills at Battle Creek led to deaths of numerous indigenous peoples.⁴³

For reference, as of 2019, 1.8 percent of the State’s population and 1.2 percent of Salem’s population identifies as American Indian and/or Alaska Native, roughly 76,000 and 2,100 people respectively.

Women. Women, too, have been discriminated against since Oregon’s founding. State laws and practices prohibited women from owning property and being employed in certain professions. While the State granted women right to vote in 1912, seven years before the 19th Amendment was passed by U.S. Congress, these provisions only applied to white women and excluded first-generation immigrant women from Asia and Native American women who were not married to white men from voting. Notably, the Oregon women’s suffrage movement was initiated by groups in Salem and Albany in 1870.⁴⁴

Despite an early history of measured equality in the realm of voting, other forms of state sponsored discrimination persisted. For example, in 1956, the Oregon Supreme Court upheld law that regulated gendered participation in certain occupations and events.⁴⁵ And, before federal legislation in the 1970s, it was common for women in Oregon to face discrimination when attempting to obtain housing and loans.⁴⁶ Legislatively, equal rights among the genders was not finalized until 2014 when the Oregon Equal Rights for Women Initiative was passed.⁴⁷

⁴⁰ Quigley, K. Introduction to Oregon’s Indian Tribes. Retrieved January 2, 2016, from <http://bluebook.state.or.us/national/tribal/tribalintro.htm>

⁴¹ Fixico, D. (2016). Termination and Restoration in Oregon. Retrieved January 5, 2016, from

http://oregonencyclopedia.org/articles/termination_and_restoration/#.VovhNPZljcs

⁴² Ibid.

⁴³ Lewis, D. (2021, Jan. 20). City of Salem. Retrieved June 2, 2021, from https://www.oregonencyclopedia.org/articles/salem_city_of/#.YlFg8aFIBaQ

⁴⁴ Jensen, K. (2021, Jan. 20). Woman Suffrage in Oregon. Retrieved June 2, 2021, from https://www.oregonencyclopedia.org/articles/woman_suffrage_in_oregon/#.YlFJSqFIBaQ

⁴⁵ State v. Hunter, 208 Or. 282, 300 P.2d 455 (1956).

⁴⁶ Fair Housing Council of Oregon. Sex discrimination. Retrieved June 15, 2021, from <http://www.fhco.org/discrimination-in-oregon/protected-classes/sex>

⁴⁷ Phillips, E. (2014, Oct. 29). Sex-Equality Backers Seek Impetus in Oregon Measure. Retrieved June 2, 2021, from <https://www.wsj.com/articles/sex-equality-backers-seek-impetus-in-oregon-measure-1414626832>

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Summary effects of historic discrimination in Oregon. The historical information above provides context for Keen Independent’s analysis of transportation and mobility in the Salem area, and how demographic groups are treated. Past societal discrimination undoubtedly shapes the experiences of Oregonians. Discriminatory laws and events of earlier centuries leave legacies that agencies must address in their diversity, equity and inclusion efforts.

The City of Salem has been proactive in addressing its own legacies of discrimination and bias. In 1967, the City created a 15-person Human Rights and Relations Advisory Commission to develop anti-discrimination ordinances and promote equality in the area.⁴⁸ Also, as noted earlier, Salem has been particularly progressive in its treatment of the LGBTQ community in comparison with the rest of the state.

⁴⁸ Woodworth, W. (2017, Oct. 19). Salem Ranks Highest Among Oregon Cities for LGBTQ Equality. The Statesman Journal. Retrieved May 28, 2021, from

<https://www.statesmanjournal.com/story/news/2017/10/19/salem-ranks-highest-among-oregon-cities-lgbtq-equality/781344001/>

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B. Diversity, Equity and Inclusion in the Transit Industry

Leaders in public transit have become increasingly aware of the importance of diversity, equity and inclusion (DEI) internally as well as externally. This focus extends to industry associations, such as the Transportation Research Board and American Public Transportation Association, who have actively sponsored research, reports and conferences on equity in transportation.

Despite this emphasis, research has found that common barriers exist for agencies to achieve DEI progress. These barriers include:

- Lack of quality and/or quantity of necessary data to measure DEI status and progress;
- Lack of standards or benchmarks for outcomes and goals;
- No (or limited) legislative or public support for DEI initiatives at agencies;
- Limited ability or tools to analyze and integrate DEI-related data;
- Absent organizational support for DEI programs and initiatives;
- Lack of organizational capacity to implement programs;
- Limited DEI-specific funding;
- Limited (or no) staff dedicated to advancing DEI; and
- Lack of leadership and staff motivation.⁴⁹

Transit leaders can overcome the abovementioned barriers and advance DEI in many ways. This section briefly details the existing literature on this topic, and is organized in two parts: internal DEI efforts and external DEI efforts.

⁴⁹ Cantilina, K., Daly, S., Reed, M. & Hampshire, R. (2021, Jan. 26). "Strategies and Barriers to Addressing Equity in Transportation: Experiences of Transportation Practitioners." TRB 2021 Annual Conference. Transportation Equity Poster Session.

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Internal DEI efforts. Transit leaders have found that for progress to occur, DEI must be centrally integrated into a transit agency’s mission and leadership goals. This entails moving past compliance with federal regulations to properly fund efforts and address equity issues promptly.⁵⁰

Researchers have also found that agencies broadly incorporate the following strategies as well to approach DEI holistically:

- Collaborating and partnering with other organizations in DEI efforts;
- Integrating non-transit related data into decision-making processes;
- Considering the needs and contexts of vulnerable communities;
- Improving services;
- Improving the quality and collection of DEI-related information;
- Conducting stakeholder outreach and engagement;
- Decision-making that emphasizes bottom-up processes;
- Initiating equity-related projects;
- Utilization of qualitative (e.g., interviews and focus groups) and quantitative (e.g., workforce analysis) data;
- Advocating for equity policies;

⁵⁰ Carter, D. (2021, Jan. 25). “Our Work is Never Done.” TRB 2021 Annual Conference. Thomas B. Deen Distinguished Lectureship.

⁵¹ Cantilina, K., Daly, S., Reed, M. & Hampshire, R. (2021, Jan. 26). “Strategies and Barriers to Addressing Equity in Transportation: Experiences of Transportation Practitioners.” TRB 2021 Annual Conference. Transportation Equity Poster Session.

- Encouraging pilot DEI projects; and
- Considering the environmental impact of the agency and its services.⁵¹

Most agencies use a combination of these efforts.

With these broad approaches in mind, the following sections will examine literature on how transit agencies use targeted measures to integrate DEI in the workforce and in procurement efforts.

Workforce. Many organizations place an emphasis on using human resources methods to transform the workplace into a racially and socially just space. This is because in addition to the social benefits of achieving a representative and inclusive workforce, research has found that diverse workforces perform better and are more innovative than homogenous workforces.⁵²

Workforce-based approaches to DEI include hiring and recruitment, retention and training. This section will explore each of these topics with a focus on efforts tailored to or used by public transit agencies.

⁵² Roberts, L. & Mayo, A. (2019). “Toward a Racially Just Workplace.” Harvard Business Review. Retrieved on June 16, 2021, from <https://hbr.org/2019/11/toward-a-racially-just-workplace>

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Hiring and recruitment. Developing a diverse workforce begins with intentional recruitment and hiring initiatives. Some organizations use targeted recruiting and preference hiring to seek out minority and women candidates.^{53, 54} Others have developed recruitment pipelines via internships and apprenticeship programs to identify qualified and interested diverse candidates. Pipelines can be particularly helpful when filling positions that traditionally lack diversity. For example, the Los Angeles County Metropolitan Transportation Authority (LACMTA) has the Women Build Metro Los Angeles apprenticeship program to encourage women to enter the construction and transportation trades professions.⁵⁵

Retention. Once resources are spent locating, developing and hiring diverse candidates, organizations must effectively retain said employees, as attrition of diverse employees tends to be greater than non-diverse employees. Attrition of diverse employees has been found to be caused by:

- Better and more competitive wages in the private sector;
- Viewing public sector employment as a “steppingstone” for careers elsewhere;
- Unfair treatment, opportunities and pay; and
- Feeling underappreciated or undervalued.⁵⁶

To combat these issues, research has found that on-boarding, competitive compensation, on-the-job training and presenting the job realistically at time of recruitment can increase retention.^{57, 58, 59}

Forming bonds with coworkers has also been found increase retention. Organizations can formally and informally promote mentorships, networking and employee resource groups to help diverse employees connect with others through funded programs, holding events and more.⁶⁰ Research has found that ultimately, perceptions of support from colleagues and leaders decrease feelings of social isolation and prolong the longevity of diverse employees.⁶¹

⁵³ National Academies of Sciences, Engineering, and Medicine. (2003). *The Transportation Workforce Challenge: Recruiting, Training, and Retaining Qualified Workers for Transportation and Transit Agencies – Special Report 275*. Washington, DC: The National Academies Press. <https://doi.org/10.17226/10764>.

⁵⁴ Roberts, L. & Mayo, A. (2019). “Toward a Racially Just Workplace.” *Harvard Business Review*. Retrieved on June 16, 2021, from <https://hbr.org/2019/11/toward-a-racially-just-workplace>

⁵⁵ Metro Magazine Staff. (2019, May 13). “LA Metro Looking for Women Interested in Transportation, Construction.” Retrieved June 16, 2021, from <https://www.metro-magazine.com/10031455/la-metro-looking-for-women-interested-in-transportation-construction>

⁵⁶ Stephens, N., Rivera, L. & Townsend, S.(n.d.) *What Works to Increase Diversity? A multi-level approach*. Retrieved June 14, 2020, from https://www.nicolestephens.com/uploads/3/9/5/9/39596235/stephensriveratownsend_robsubmission_8-28.pdf

⁵⁷ National Academies of Sciences, Engineering, and Medicine. (2001). *Practical Resources for Recruiting Minorities for Chief Executive Officers at Public Transportation Agencies*. Washington, DC: The National Academies Press. <https://doi.org/10.17226/13324>.

⁵⁸ National Academies of Sciences, Engineering, and Medicine. (2003). *The Transportation Workforce Challenge: Recruiting, Training, and Retaining Qualified Workers for Transportation and Transit Agencies – Special Report 275*. Washington, DC: The National Academies Press. <https://doi.org/10.17226/10764>.

⁵⁹ Ivey, S., M. Powers, & Clark, A. (2019). “Building a Business Case for Increasing Diversity in the Transportation Workforce.” *TR News*.

⁶⁰ Roberts, L. & Mayo, A. (2019). “Toward a Racially Just Workplace.” *Harvard Business Review*. Retrieved on June 16, 2021, from <https://hbr.org/2019/11/toward-a-racially-just-workplace>

⁶¹ Ibid.

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Professionalization and promotion are another facet of retention that can be utilized to increase the diversity of a workforce for the long-term by sponsoring and offering opportunities to qualified diverse candidates.⁶² However, for this to be perceived as equitable by staff and positively impact retention, both must be done objectively and transparently.⁶³

Training. Many transit agencies utilize DEI training to educate employees and leaders, as well as emphasize DEI as an organizational focus. Training can take many forms (e.g., group class format and one-on-one), have many delivery methods (e.g., in-person and web-based) and cover numerous topics. For example, Greater Cleveland Regional Transit Authority provides employees an Inclusive Leadership Certificate training program, as well as courses on frontline supervisor development training, implicit bias and disability etiquette.

Despite widespread use, there is no consensus among researchers on the effectiveness of training on advancing long-term organizational DEI. For example, some studies find that training positively influences cognitive- and skill-based outcomes,⁶⁴ but others find that improvement is short-lived (i.e., only two days).^{65, 66}

Additionally, some specialists argue that policy-mandated non-context-specific DEI training is not helpful and can even hinder progress. Instead, training must fit the needs and reality of the agency, and be integrated into organizational practices to be impactful.⁶⁷

Procurement. Equity in procurement can come in many forms — from compliance with federal disadvantaged business enterprise (DBE) programs to innovative efforts that promote contracting with businesses owned by certain groups.

Since the 1980s, compliance with federal DBE programs has typically been the focus of most transit agency DEI efforts. This is due to the fact that agencies must comply with federal programs as a condition of receiving USDOT funds, per federal regulations in 49 CFR Part 26. Under these regulations, agencies — when awarding federally funded contracts — must consider whether bidders meet a DBE goal or show good faith efforts to do so.

⁶² Newkirk, P. 2019. *Diversity, Inc: The Failed Promise of a Billion-Dollar Business*. Bold Type Books, New York, NY.

⁶³ Dobbin, F., & Kalev, A. (2016). "Why Diversity Programs Fail." *Harvard Business Review*. Retrieved June 16, 2021, from <https://hbr.org/2016/07/why-diversity-programs-fail>.

⁶⁴ Kalinoski, Z.T., D. Steele-Johnson, E.J. Peyton, K.A. Leas, J. Steinke, and N.A. Bowling. (2013). "A Meta-Analytic Evaluation of Diversity Training Outcomes." *Journal of Organizational Behavior*, Vol. 34, No. 8, pp. 1076-104.

⁶⁵ Dobbin, F., & Kalev, A. (2016). "Why Diversity Programs Fail." *Harvard Business Review*. Retrieved June 16, 2021, from <https://hbr.org/2016/07/why-diversity-programs-fail>.

⁶⁶ Levy Paluck, E., and D.P. Green. (2009). "Prejudice Reduction: What Works? A Review and Assessment of Research and Practice." *Annual Review of Psychology*, Vol. 60, pp. 339-367.

⁶⁷ Brown, T. (2021, Jan. 28). "Diversity and Inclusion Training Combating Stereotypes." TRB 2021 Annual Conference. Lectern Session.

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Research has found that successful firms who have graduated out of DBE programs, primarily those in construction or professional services work, attribute some of their success to programs created to comply with federal regulations at transit agencies. Graduated firm owners were found to have used training and other technical assistance services offered by transit agencies and indicated that they would continue to do so.⁶⁸

Public transportation agencies can use several approaches to improve equity in procurement and increase the success of diverse disadvantaged business. Those listed to the right have been found to be the most effective:

- Offering basic DBE program services (e.g., certification, goal setting and monitoring);
- Providing training tailored to conducting business in the public transit industry;
- Offering individualized business assistance;
- Addressing accessibility barriers to capital and bonding;
- Encouraging mentorships between successful and emerging DBEs;
- Easing the transition after graduating from a DBE program;⁶⁹

- Limiting bidding eligibility on certain contracts to small businesses;
- Encouraging DBE certification among eligible firms;
- Unbundling contracts into smaller, lower risk projects;
- Supporting joint-venture participants; and
- Easing bonding and insurance requirements.⁷⁰

⁶⁸ Keen, D., Keen, A., Kyritsis, J. & Monter, B. (2019). NCHRP Research Report 913: Compendium of Successful Practices, Strategies, and Resources in the U.S. DOT Disadvantaged Business Enterprise Program. Transportation Research Board.

⁶⁹ Ibid.

⁷⁰ National Academies of Sciences, Engineering, and Medicine. (2015). A Guidebook for Increasing Diverse and Small Business Participation in Airport Business Opportunities. Washington, DC: The National Academies Press. <https://doi.org/10.17226/22220>.

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Additional strategies can also be used to increase the participation of diverse businesses, including:

- Purposeful planning of procurement participation by diverse businesses;
- Completing regular disparity studies;
- Offering language translation;
- Utilizing new and different technologies when promoting opportunities;
- Internal measurement of diversity goal achievement;
- Publicizing diversity goal achievement (internally and externally);
- Creating relationships with local industry associations and other community partnerships; and
- Business training programs.⁷¹

External DEI efforts. Diversity, equity and inclusion can also be advanced using outward-facing initiatives. This subsection examines literature regarding:

- Environmental initiatives;
- Transportation network design;
- Local housing and businesses;
- Fare pricing;
- Language inclusion; and
- Transit policing and homelessness.

Environmental initiatives. Minority and low-income neighborhoods tend to be located closer to transportation systems compared to the general population. Consequently, neighborhoods of color and low-income communities tend to be exposed to greater environmental harm from transportation systems.^{72, 73} To address this impact, transit agencies typically employ environmental assessments to evaluate the costs and benefits — environmental, social and economic — of services and routes on neighborhoods.

⁷¹ Ibid.

⁷² Banzhaf, H.S., L. Ma, & C. Timmins. (2019). “Environmental Justice: Establishing causal relationships.” *Annual Review of Resource Economics*, Vol. 11, pp. 377-398.

⁷³ Rodier, C., F. Alemi, & R.A. Johnston. (2015). “Exploring Unintended Environmental and Social-Equity Consequences of Transit Oriented Development.”

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Many public transportation agencies have “gone green” in their operations to minimize environmental impact. Common efforts include:

- Clean energy vehicles;
- Mechanical improvement of buses to reduce traffic congestion during service;
- Conservation of water used by transit vehicles;
- Regular sustainability studies;
- Recycling of operations-based metal, tires, batteries, wood and oil; and
- Automatic shut-off of buses (to prevent idling).

Cherriots has made some of these environmental efforts. For example, half of the organization’s bus fleet currently operates on renewable natural gas, which is estimated to reduce tailpipe emissions by over 90 percent and greenhouse gases by over 40 percent. This energy improvement has also resulted in decreasing bus operating costs.⁷⁴

Transit network design. Historically, transit networks have been designed with implicit and explicit bias against “urban” (i.e., riders of color) and “dependent” (i.e., riders of low socioeconomic status) customers, and with the purpose of segregating certain riders from certain neighborhoods.⁷⁵ To address these structural issues, equity

researchers note that agencies must reassess networks for racial bias,⁷⁶ as well as for three equity elements:

- Spatial equity: the fairness of spatial distribution of services and facilities;
- Longitudinal equity: the equity in quality and quantity of services provided to different rider groups over a period of time; and
- Modal equity: the difference in access to various modes of transit in the same area, or difference in access to the same area via various modes of transit.

By evaluating a network using these three elements, leaders can identify structural issues that may affect multiple disadvantaged groups and address them.⁷⁷

Equity researchers encourage this emphasis on equity in network design, particularly when:

- Prioritizing funding of transit locations;
- Complying with federal regulations;
- Developing strategies for service delivery;
- Planning activities; and
- Evaluating the “effectiveness and efficiency for node/stop prioritization.”⁷⁸

⁷⁴ Cherriots. (n.d.). “Cherriots is Oregon’s Cleanest Public Transit Fleet.” Salem Area Mass Transit District. Retrieved June 15, 2021, from <https://www.cherriots.org/news/cherriots-is-oregons-cleanest-public-transit-fleet/>

⁷⁵ Spieler, C. (2020). “Racism Has Shaped Public Transit, and it’s Riddled with Inequities.” Rice University, Kinder

⁷⁶ Carter, D. (2021, Jan. 25). “Our Work is Never Done.” TRB 2021 Annual Conference. Thomas B. Deen Distinguished Lectureship.

⁷⁷ Kim, M., Kho, S. Y., & Kim, D. K. (2019). “A Transit Route Network Design Problem Considering Equity.” Sustainability. DOI: 10.3390/su11133527

⁷⁸ Welch, T. & Sabyasachii, M. (n.d.). “A Measure of Equity for Public Transit Connectivity.”

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Local housing and businesses. As transit networks expand to serve more communities, so, too, do the disruptive effects of network construction. Increased taxes, traffic, gentrification, housing displacement and safety risks can negatively affect residents, homeowners and businesses.⁷⁹ Some agencies have developed programs to mitigate effects, however these tend to be centered on businesses. Some examples include:

- In 2016, AC Transit with the City of Oakland and the City of San Leandro developed mitigation funds to help businesses cope with disturbances while building East Bay Bus Rapid Transit. Additionally, AC Transit provided business assistance programs to affected firm owners that included operations training, specialty consultants and financial programs.
- LACMTA has a Business Interruption Fund, an assistance program for small businesses impacted by agency construction; a Business Solution Center for owners to receive additional assistance; and the Eat, Shop, Play program, which promotes businesses impacted by construction.

A limited number of agencies have programs for residents, renters and homeowners. Notably, TriMet in Portland is one of the few that has such a program. Over the past 6 years, TriMet has helped to develop 718 housing units (the majority of which are affordable housing) in mixed-use developments near stations to address rising housing costs in areas with proximity to TriMet services.

Fare pricing. Fare pricing can greatly impact the accessibility and equity of a transit agency's services. Fare that is too expensive can exclude certain socioeconomic groups from service. However, pricing is not typically a focus of agency DEI efforts, nor of transportation research (the Transportation Research Board, for example, has limited research on this topic).

Fare structure as well as payment options are two tools that agencies can use to address DEI:

- Flat fees, distance-based fares, zone-based fares, service-type based pricing, time of day pricing and concession fares can be adjusted or combined to create equitable rates for disadvantaged groups. This can be seen in discounted concession fares or lowered monthly fees provided by most agencies to disabled people, seniors and youth (similar to Cherriot's "reduced fare ID").
- The availability of cash-, card- and account-based payment systems can expand ridership accessibility to all groups. Research has found that account-based systems (typically stored on mobile devices) are the most equitable payment system.⁸⁰ However, it is important to note that account-based systems typically must be linked to a credit or debit card, which poses a barrier to those without such cards.

⁷⁹ Litman, T. (2020). "Evaluating Public Transit Benefits and Costs: Best practices guidebook." Victoria Transport Policy Institute.

⁸⁰ National Academies of Sciences, Engineering, and Medicine. (2017). Multiagency Electronic Fare Payment Systems. Washington, DC: The National Academies Press. <https://doi.org/10.17226/24733>

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Cherriots' eFare system (initiated in 2018), as well as its freeze on fare collection during the COVID-19 pandemic indicates an awareness of the role fare pricing has on social equity, as well as an organizational willingness to modify practices according to the needs and contexts of ridership.

Language inclusion. Signage, maps, announcements and brochures in multiple languages, as well as multilingual staff is another method for transit agencies to be more inclusive of diverse riders. This approach not only increases accessibility of service information, but also normalizes the use of different languages on agency vehicles and at transit centers.

Transit policing and homelessness. Due to national protests in 2020, policing is a primary topic among social activists and legislators. Policing in public transit has also received attention — attention that was sparked in 2009 with killing of an African American rider by a Bay Area Rapid Transit police officer. Since 2020, many agencies have begun to address public concern while balancing public safety, including initiating study committees to evaluate the effectiveness of unarmed police presence (LACMTA)⁸¹ and creating community engagement advisory groups (Bay Area Rapid Transit)⁸². However, definitive best practices in this realm of agency operations is still unclear.

A growing public safety concern for nearly all transit agencies is the growing homeless population and their utilization of public transportation vehicles and facilities as shelters. Research has found that homeless individuals seek out transit facilities, because they provide access to public restrooms, donations from other riders and safety (in the form of transit police or security). A 2019 study by American Public Transportation Association found that 78 percent of surveyed transit agencies reported that homeless riders impact general ridership, and only 5 percent of surveyed agencies have budgets allocated towards addressing issues related to homelessness.⁸³

Industry leaders recommend the following approaches toward homelessness:

- Treat all riders with dignity and respect;
- Create exterior public restrooms outside of transit facilities;
- Include social workers/outreach officers with police officers when responding to issues related to homelessness;
- Provide safety training to operators;
- Align transit networks and service with social service facilities;
- Partner with local government and private companies to obtain funding to address issues of homeless; and
- Create strategies that do not require funding.⁸⁴

⁸¹ Fonseca, R. (2020). "LA Metro Will Explore Ways to Replace Armed Policing on Public Transit." LAist. Retrieved June 16, 2021, from https://laist.com/2020/06/25/la_metro_will_look_to_replace_armed_policing_on_public_transit.php

⁸² Jordan, M. (2020). "BART PD Chief Ed Alvarez Talks Police Reform with Latinos in Transit Group." Bart.gov. Retrieved June 16, 2021, from <https://www.bart.gov/news/articles/2020/news20200825>

⁸³ APTA. (2019). "Public Transit and Social Responsibility: Homelessness." APTA Mobility Conference.

⁸⁴ Ibid.

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C. Transportation and Mobility in the Salem Area

The first iteration of public transportation in the City of Salem were street- and horsecars that connected downtown Salem and the train depot in the late-1880s. These cars developed into the Salem Street Railway, Capital City Railway Company and the Salem Motor Railway. Eventually these companies consolidated into the Salem Light, Power and Traction Company, an organization with roughly 14 miles of lines.⁸⁵

As public transportation advanced throughout the region, Salem's network was subsumed by neighboring interests, including the Citizen's Light and Traction Company, the Portland Railway Light and Power Company and the Southern Pacific Railroad. In 1927, streetcar services were terminated in the City due to waning profitability.⁸⁶

In the mid-1960s, the City Council of Salem approved the purchase of the bankrupt bus company, City Transit Lines, by a private bus service, Capital Transit. This initiated a surface-based transit system within the City and the Willamette Valley.⁸⁷ In 1966, Salem residents voted for the City to assume operational and financial control over the service.

The service was soon named, "Cherriots" to celebrate the City's cherry industry history. As the system continued to operate, political factions within the region and voters disagreed about how to expand, operate and finance the transit system.⁸⁸ Eventually, in 1979, the service became a mass transit district with a separate five-member board of directors. With this change came a new name, the "Salem Area Mass Transit District."⁸⁹

⁸⁵ Thompson, R. (2018). Salem Streetcar System. Retrieved June 8, 2021, from https://www.oregonencyclopedia.org/articles/salem_streetcar_system/#.YL--d0xlDmE

⁸⁶ Ibid.

⁸⁷ Marshall, T. (1959). Capital Transit Expected to get Bus Franchise. Statesman Journal. Retrieved June 8, 2021, from <https://www.newspapers.com/clip/16360668/capital-transit-franchise/>

⁸⁸ Dickie, L. (1979). Backers Fell Time is Right for Transit District. Statesman Journal. Retrieved June 8, 2021, from

https://www.newspapers.com/image/?clipping_id=16362719&fcfToken=eyJhbGciOiJIUzI1NiIsInR5cCI6IkpXVCJ9.eyJmcmVILXZpZXctaWQiOiJlE5ODkyOTlwMSwiaWF0IjoxNjIzMTgzMDIxLjIleHAiOiJlE2MjMyNjk0MjF9.iGdDWBPVw7gNNfYXKc9oqtDU2FjjqbgyhZSOmyQgJiO

⁸⁹ Cherriots. (n.d.). History of Cherriots. Retrieved June 8, 2021, from <https://www.newspapers.com/clip/16360668/capital-transit-franchise/>

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Expansion. Since 1979, the area served by the Salem Area Mass Transit District (SAMTD) has grown to include 76 square-miles across the City, Keizer and the Willamette Valley. Cherriots' 2021 operating budget is roughly \$94.6 million.⁹⁰

As of 2018, Cherriots' fleet includes 64 traditional, 46 paratransit and 15 regional buses.⁹¹ With many buses already operating on natural gas, as mentioned earlier, Cherriots received \$3.5 million in June 2020 from the Federal Department of Transportation to purchase five electric buses to add to their fleet and increase environmental sustainability.⁹² These new buses are expected to begin driving Cherriots routes in 2021.

Cherriots is also considering expanding services into Albany. The agency launched a feasibility study in late-2020 to assess the usefulness, cost and desired frequency of a route that extends to Albany. Doing so would connect outside riders to the state capital and increase access to jobs.⁹³

Organization. Organizationally, Cherriots is run by a seven-member board of directors.⁹⁴ Once publicly elected, directors are appointed by the governor. As of the writing of this document, the board is currently comprised of four women and three men.⁹⁵

Despite the City's role in Cherriots operations, Cherriots is not a City entity, but rather one that collaborates with the City via policies and receives legislature-approved funding. Funding for the agency is derived from federal and state sources, as well as local property tax and statewide employee payroll tax.⁹⁶ The City of Salem advises Cherriots via temporary City Council Committees, such as the recent Public Transit Committee, the Special Transportation Fund Advisory Committee and Citizens Advisory Committee.^{97 98}

⁹⁰ Thomas, J. (2021). Cherriots to Get Two New Faces on its Board of Directors. Salem Reporter. Retrieved June 8, 2021, from <https://www.salemreporter.com/posts/4102/cherriots-to-get-two-new-faces-on-its-board-of-directors>

⁹¹ Cherriots. (2018). Bus Purchases. Retrieved on June 8, 2021, from <https://web.archive.org/web/20180723122844/http://www.cherriots.org/en/projects/buspurchases>

⁹² Harrell, S. (2020). The Most Used Bus Line in Salem is Poised to go Electric. Salem Reporter. Retrieved June 8, 2021, from <https://www.salemreporter.com/posts/2548/the-most-used-bus-line-in-salem-is-poised-to-go-electric>

⁹³ Thomas, J. (2021). Cherriots Considers New Bus Service Connecting Salem to Albany. Salem Reporter. Retrieved on June 8, 2021, from <https://www.salemreporter.com/posts/3950/cherriots-considers-new-bus-service-connecting-salem-to-albany>

⁹⁴ Thomas, J. (2021). Cherriots to Get Two New Faces on its Board of Directors. Salem Reporter. Retrieved June 8, 2021, from <https://www.salemreporter.com/posts/4102/cherriots-to-get-two-new-faces-on-its-board-of-directors>

⁹⁵ Cherriots. (2021). Board of Directors. Retrieved June 8, 2021, from <https://www.cherriots.org/board/>

⁹⁶ Cherriots. (2018). 2018 Strategic Plan. Retrieved June 8, 2021, from <https://www.cherriots.org/board/>

⁹⁷ City of Salem. (2018). Salem City Council Public Transit Committee. Retrieved on June 8, 2020, from <https://www.cityofsalem.net/Pages/salem-city-council-public-transit-committee.aspx>

⁹⁸ Cherriots. (2018). 2018 Strategic Plan. Retrieved June 8, 2021, from <https://www.cherriots.org/board/>

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Ridership. Monthly ridership at Cherriots typically exceeds 250,000. As with other transit agencies, Cherriots experienced a decrease during the COVID-19 pandemic: in March 2020, Cherriots saw a drop in ridership to 27,196; in April ridership was 54,529; and May ridership was 87,417. By July 2020, monthly ridership surpassed 100,000. Part of this decrease can be attributed to a temporary shut down and reduced service at the height of the pandemic due to public health concerns.⁹⁹

2017 Needs Assessment Report. In 2017, Cherriots performed a needs assessment to evaluate:

- System performance;
- Rider demographics and demographic shifts;
- Travel patterns;
- Employee sentiment; and
- Community sentiment.¹⁰⁰

In addition to mapping, ridership analysis and internal stakeholder engagement, Cherriots conducted a survey of riders to generate report findings. This assessment is the most recent of its kind. Analysis by Cherriots recommended the following:

- Saturday and Sunday service should be instituted across local, regional and paratransit services;
- Weekday evening service should be extended to 11pm;
- Holiday operations should be instituted;
- Several local routes should have increased service frequency;
- Unserved areas, including West Salem, D Street, Walmart on Turner Road, Fisher Road and River Road S should be served;
- Service area should expand to neighboring cities of Portland and Albany to connect riders;
- Timing of routes should be improved;
- Chemeketa Transit Center should be expanded to better facilitate transfers;

⁹⁹ Barreda, V, (2020). Cherriots in Salem Resumes 95% of Weekday ‘Pre-Pandemic’ Service Levels. Statesman Journal. Retrieved on June 8, 2021, from <https://www.statesmanjournal.com/story/news/2020/09/29/cherriots-salem-resumes-most-regular-weekday-pre-pandemic-service-routes/3565009001/>

¹⁰⁰ Cherriots. (2017, Nov.). 2017 Needs Assessment Report. Salem Area Mass Transit District.

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- On-time performance should be improved by adding additional run time and real-time bus tracking;
- Create more bus shelters and seating for riders;
- Allow eFare options;
- Study the impact of free youth or student passes on the system;
- Develop a proposal for discounted passes for low-income riders, as well as study the impact such a pass would have on Cherriotics operations;
- Develop a group pass program; and
- Create a universal day pass that works on local, regional and SMART Cherriotics routes.

Needs assessment findings were utilized by Cherriotics leadership to enact the following changes:

- In 2018, an eFare system was created to increase the convenience of riders.¹⁰¹
- In 2018, weekend, evening and holiday service was expanded, due to increased funding from the State.¹⁰²
- In 2020, a feasibility study was initiated to study routes connecting the cities of Salem and Albany.¹⁰³
- In 2019, Cherriotics offered reduced youth fares.¹⁰⁴

¹⁰¹ Cherriotics. (2018). 2018 Strategic Plan. Retrieved June 8, 2021, from <https://www.cherriotics.org/board/>

¹⁰² Ibid.

¹⁰³ Thomas, J. (2021). Cherriotics Considers New Bus Service Connecting Salem to Albany. Salem Reporter. Retrieved on June 8, 2021, from

<https://www.salemreporter.com/posts/3950/cherriotics-considers-new-bus-service-connecting-salem-to-albany>

¹⁰⁴ Cherriotics. (2019). Cherriotics Annual Report 2019-2018. Salem Area Mass Transit District.

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D. Diversity, Equity and Inclusion Efforts to Date at Cherriots

Sparked by the nationwide racial protests in spring 2020, Cherriots board of directors initiated a diversity, equity and inclusion work plan and the creation of a three-member DEI committee in June 2020.¹⁰⁵ From these initiatives, several DEI-related events have transpired:

- Cherriots initiated a search for DEI consultation services and hired Keen Independent as a consultant for the current DEI project.
- The governor appointed Maria Cecilia Hinojos Pressey, a Latina who is an advocate for refugees, farmworkers and working families to Cherriots' board of directors in 2020.¹⁰⁶ Another local woman business owner, Sara Duncan, was also appointed to the board in 2021.¹⁰⁷
- The agency issued a statement against discrimination and reiterating a commitment to DEI during Black History Month in 2021.¹⁰⁸

While Cherriots has largely been proactive at promoting DEI in the abovementioned manners, issues of disparity have arisen. In 2021, for example, Cherriots was found to have not met its minority- and women-owned business contracting goals for the past several years.¹⁰⁹

¹⁰⁵ Cherriots. (2020). Cherriots Transit Board Commits to Taking Action on Racial Equity. Retrieved June 8, 2021, from <https://www.cherriots.org/news/cherriots-transit-board-commits-to-taking-action-on-racial-equity/>

¹⁰⁶ Cherriots. (2020). Latinx Community Advocate Appointed to Salem Public Transit Board. Retrieved June 8, 2021, from <https://www.cherriots.org/news/latinx-community-advocate-appointed-to-salem-public-transit-board/>

¹⁰⁷ Thomas, J. (2021). Cherriots to Get Two New Faces on its Board of Directors. Salem Reporter. Retrieved June 8, 2021, from

<https://www.salemreporter.com/posts/4102/cherriots-to-get-two-new-faces-on-its-board-of-directors>

¹⁰⁸ Cherriots. (2021). Cherriots Celebrates Black History Month. Retrieved June 8, 2021, from <https://www.cherriots.org/news/cherriots-celebrates-black-history-month/>

¹⁰⁹ Thomas, J. (2021). Cherriots Failed to Meet Minority Contracting Goals for Years. Salem Reporter. Retrieved June 8, 2021, from <https://www.salemreporter.com/posts/3567/cherriots-failed-to-meet-minority-contracting-goals-for-years>