



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

Thursday, January 26, 2023 at 6:30 PM

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

- ZOOMGOV \* **Meeting ID:** 161 750 1876| **Passcode:** 581378  
Go to: <https://cherriots-org.zoomgov.com/j/1617501876?pwd=MW1obXdqdkhVa3FMZlczYzldExuZz09>
- COMCAST CHANNEL 21
- LIVE STREAM: <https://www.capitalcommunitymedia.org/all>
- ONE TAP MOBILE: +16692545252,,1617501876#,,,,\*581378# US
- LANDLINE PHONE: +1 669 254 5252 US

**AGENDA**

**A. CALL TO ORDER**

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

**B. ANNOUNCEMENTS AND CHANGES TO AGENDA**

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

- Shall the Board direct the Second Reading of Ordinance No. 2019-01 by Title?  
Board meeting to receive citizen testimony regarding proposed changes to the fare structure, fare programs and fare levels as described in the proposed Ordinance No. 2023-01 pursuant to ORS 198.540 and ORS 267.150? ..... 5
- Public Comment: Frank Waters ..... 29

**D. DELIBERATION OF PUBLIC HEARING**

Shall the Board adopt Ordinance No. 2023-01 to repeal and replace Ordinance No. 2019-01 to establish SAMTD Fare Categories and Rates, effective March 1, 2023?

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

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

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

Written testimony will be submitted and entered in to the record if it is received by 5:00 P.M. on the day of the meeting.

**F. CONSENT CALENDAR**

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

**1. Approval of Minutes**

- a. December 15, 2022 Board of Directors Meeting ..... 31
- b. December 15, 2022 Board of Directors Work Session ..... 39
- c. December 29, 2022 Special Meeting ..... 41

**2. Routine Business Items**

- a. Adopt Resolution #2023-01 to support the Statewide Transportation Improvement Fund Discretionary and Statewide Transportation Network Projects for the 2023 – 2025 biennium ..... 45
- b. Adopt Resolution 2023-02 to approve a Federal Transit Administration (FTA) American Rescue Plan Act (ARPA) 5310 Apportionment and FTA 5310 Apportionment for Salem Area Mass Transit District ..... 71

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

**H. ACTION ITEMS**

- 1. Election of Board Secretary ..... 127
- 2. Adoption of 2023 Federal and State Legislative Agenda ..... 130
- 3. Authorize the General Manager to execute a three-year contract with Brown & Brown Northwest to provide business insurance brokerage services Approval of 5310 (Direct) Projects ..... 134

**I. INFORMATIONAL REPORTS**

**J. GENERAL MANAGER’S REPORT**

**K. BOARD OF DIRECTOR REPORT ..... 137**

This is the time for Board members to report on transit-related issues through committee and meeting participation, citizen communications, or special projects they are participating in as representatives of the District.

**L. ADJOURNMENT**

**Next Regular Board Meeting Date: Thursday, February 23, 2023**

- **Virtual Meetings:** The Board of Directors meeting is a public meeting; typically in a place that is ADA- accessible. Board meetings will also be available via *ZoomGov*. The meeting I.D. and passcode are on the top of the agenda.
- **Closed Captioning (CC):** *ZoomGov's* live streaming platform includes Closed Captioning (CC). It is a good tool for aiding viewer participation in the meeting. However, CC does not always translate accurately.
- **Alternate Formats** This is a public meeting in a place that is ADA accessible. With 48 hours of notice, auxiliary hearing aids and services, and alternate formats for individuals with limited English proficiency are available. Requests can be made to the Clerk of the Board by phone at 503-588-2424 or with the assistance of TTY: Oregon Relay Services at 1-800-735-2900 (or 711). Cherriots administration office hours are Monday-Friday from 8:00 AM to 5:00 PM.
- **Electronic Copies** of the Board's meeting agenda packet are distributed by email 6-7 days prior to the meeting. The agenda packet is also included on the Cherriots website under Public Meetings and Notices at: <https://www.cherriots.org/meetings/>.
- **Email Distribution List:** To add your email address to the Board's meeting distribution list, please send your email address to the Clerk of the Board at [publictestimony@cherriots.org](mailto:publictestimony@cherriots.org).

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- Reuniones virtuales: La reunión de la Junta Directiva es una reunión pública; típicamente en un lugar que sea accesible según la ADA. Sin embargo, esta reunión de la Junta se llevará a cabo virtualmente a través de ZoomGov siguiendo las directivas del Gobernador Brown para mantener a las personas seguras y saludables durante la pandemia de Covid-19.
  - Subtítulos ocultos (CC): la plataforma de transmisión en vivo de ZoomGov incluye subtítulos ocultos (CC). Es una buena herramienta para ayudar a los espectadores a participar en la reunión. Sin embargo, CC no siempre se traduce con precisión.
  - Formatos alternativos Esta es una reunión pública en un lugar accesible a la ADA. Con 48 horas de anticipación, se encuentran disponibles audífonos y servicios auxiliares, y formatos alternativos para personas con dominio limitado del inglés. Las solicitudes se pueden hacer al Secretario de la Junta por teléfono al 503-588-2424 o con la ayuda de TTY: Oregon Relay Services al 1-800-735-2900 (o 711). El horario de oficina de la administración de Cherriots es de lunes a viernes de 8:00 a. M. A 5:00 p. M.
  - Se distribuyen copias electrónicas del paquete de la agenda de la reunión de la Junta por correo electrónico 6-7 días antes de la reunión. El paquete de la agenda también se incluye en el sitio web de Cherriots en Reuniones públicas y avisos en: <https://www.cherriots.org/meetings/>.
  - Lista de distribución de correo electrónico: para agregar su dirección de correo electrónico a la lista de distribución de reuniones de la Junta, envíe su dirección de correo electrónico al Secretario de la Junta a [publictestimony@cherriots.org](mailto:publictestimony@cherriots.org).



**To:** Board of Directors

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

**Thru:** Allan Pollock, General Manager

**Date:** January 26, 2023

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

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## ISSUE

Shall the Board direct the Second Reading of Ordinance No. 2023-01 by Title and close the Public Hearing that began at the December 15, 2022 Board meeting, taking into account any citizen testimony regarding proposed changes to the fare structure, fare programs, and fare levels as described in proposed Ordinance No. 2023-01 in **Attachment A** pursuant to ORS 198.540 and ORS 267.150?

## BACKGROUND AND FINDINGS

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

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

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

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

- Preparing to launch an electronic fare payment system called “*Umo*.”
- Preparing to lower Cherriots Regional and Route 1X fares to the levels of Cherriots Local service (to occur with the launch of *Umo*).
- Preparing to establish a new universal month pass for Cherriots LIFT customers (also to occur with the launch of *Umo*).

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

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

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

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

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

The Cherriots Shop and Ride fares will remain unchanged.

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

A public notice of the fare ordinance proposal as provided in **Attachment D** was published in the Statesman Journal newspaper and in online versions on December 8, 2022; and on the Cherriots website (cherriots.org) in both Spanish and English at the same time. The agenda packet posted on the Cherriots Board of Director's website contains a copy of the public notice. There was also an article in the January issue of Cherriots' e-newsletter, which is distributed to everyone on the Cherriots Marketing email list.

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

### **FINANCIAL IMPACT**

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

### **RECOMMENDATION**

Staff recommends that the Board direct the Second Reading of Ordinance 2023-01 by Title; and consider any received citizen testimony regarding proposed changes to the fare structure, rates, and effective date for transportation services pursuant to ORS 198.540 and ORS 267.150.

### **PROPOSED MOTION**

**I move that the Board direct the Second Reading of Ordinance 2023-01 by Title; and consider any received citizen testimony regarding proposed changes to the fare structure, rates, and effective date for transportation services pursuant to ORS 198.540 and ORS 267.150.**

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





**ORDINANCE 2023-01  
REPEALING ORDINANCE NO. 2019-01  
ESTABLISHING SAMTD FARE CATEGORIES, RATES,  
AND ESTABLISHING AN EFFECTIVE DATE**

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

**Cherriots Shop and Ride**

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

**Cherriots LIFT**

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

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

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

\* Proposed changes effective March 1, 2023

Fare Capping

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

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

### 30-Day Passes

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

### Month Passes

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

### Universal LIFT Month Passes

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

### Day Passes

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

## **EMPLOYER PASS PROGRAM**

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

**SALEM AREA MASS TRANSIT DISTRICT**

**ATTEST:**

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Ian Davidson, Board President

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Kirra Pressey Recording Secretary

**First Reading:**      December 15, 2022

**Second Reading:**      January 26, 2023

**Adoption:**      January 26, 2023

**Effective Date:**      March 1, 2023

**APPROVED AS TO FORM**

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Sara Sayles, District Legal Counsel



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

- Persons over 65

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

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

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

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

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

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

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

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

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

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

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

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



**2022**

*FARES ANALYSIS REPORT*

*DECEMBER 2022*



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## **1.0 Introduction and background**

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

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

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

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

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

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

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

Three other big changes are proposed with this fare change:

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

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

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

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

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

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

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

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

## 2.5 Universal LIFT month pass

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

## 2.6 Cherriots Shop and Ride fares

The Cherriots Shop and Ride fares will remain unchanged.

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

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

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

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

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

\* Proposed changes effective March 1, 2023

### 3.0 Title VI Analysis

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

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

## List of appendices:

Appendix A. History of Cherriots fares

Appendix B. Financial impact analysis

## Appendix A. History of Cherriots Fares

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

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

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

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

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

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

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

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



# Appendix B. Financial impact analysis

## 2A. Financial Impact

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

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




**NOTICE OF ORDINANCE ADOPTION**

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

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

(Spanish version)

## **AVISO DE ADOPCIÓN DE ORDENANZA**

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

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



Kirra Pressey &lt;kirra.presse@cherriots.org&gt;

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**Bus fares: How about Free Fridays?**

2 messages

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**Frank Watters** <fresh.water6951@fastmail.com>  
To: board@cherriots.org

Sat, Jan 14, 2023 at 11:10 AM

I'm OK with the proposed new fares, but I would also suggest starting a program like Free Fridays. This would make one day a week free for everyone on all local routes. It might help encourage people who don't drive to go downtown or to other commercial hubs for shopping and entertainment. Good for riders, good for businesses. Just an idea.

Frank in Salem

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**Kirra Pressey** <kirra.presse@cherriots.org>  
To: Frank Watters <fresh.water6951@fastmail.com>  
Cc: board@cherriots.org, Chris French <Chris.French@cherriots.org>

Tue, Jan 17, 2023 at 11:03 AM

Good Morning Mr. Watters,

Thank you for submitting testimony on the District's proposed fare changes. Your testimony will be entered into the record at the January 26, 2023 Board Meeting and provided to staff for review.  
Kind regards,

[Quoted text hidden]

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**Kirra Pressey**  
Executive Assistant  
[kirra.presse@cherriots.org](mailto:kirra.presse@cherriots.org)  
Direct: 503-361-7535





Salem Area Mass Transit District  
BOARD OF DIRECTORS MEETING

December 15, 2022

Index of Board Actions

<u>Action</u>	<u>Page</u>
Moved to approve the corrected Consent Calendar: .....	<b>3</b>
1. <u>Approval of Minutes</u>	
a. November 17, 2022 Board of Directors Meeting	
2. <u>Routine Business</u>	
a. Adopt Resolution No. 2022-05 Amending the CAC Bylaws	
b. Citizens Advisory Committee Member Appointment & Reappointments	
c. Citizens Advisory Committee Chair & Vice-Chair Appointments	
d. STIF Advisory Committee Chair & Vice Chair Appointments	
e. Adopt Resolution No. 2022-06 Amending the PTASP with changes prescribed by the FTA	
f. Award of Contract with GLAS Architects, LLC, for the provision of general <b><u>architectural</u></b> services	
Moved to adopt the 2043 Long Range Plan as provided in Attachment A.....	<b>4</b>
Moved to authorize the General Manager to execute a seven year contract (five base years + two option years) with CFM Advocates for legislative advocacy services for a not-to-exceed amount of \$1,149,960.....	<b>4</b>
Moved to authorize the General Manager to execute a contract with PIVOT Architecture, for the provision of environmental review, property acquisition assistance, design and engineering, and construction management services, for a not to exceed amount of \$1,700,000.....	<b>5</b>
Moved to approve the 2024-2025 biennium Statewide Transportation Improvement Fund - Formula Fund program projects, identified in Attachment A, for a total amount of \$24,522,087.....	<b>5</b>
Moved to adopt Resolution No. 2022-07 to approve the Federal Section 5310 (ODOT) Projects for the 2024-2025 biennium.....	<b>6</b>
Moved to authorize the General Manager to execute a construction contract with EC Electric to support the battery electric bus charging project at Del Webb for an amount not to exceed \$958,508.....	<b>6</b>



Salem Area Mass Transit District  
**BOARD OF DIRECTORS MEETING**  
**December 15, 2022**

**PRESENT:**

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

Staff: Allan Pollock, General Manager; David Trimble, Deputy General Manager; Denise LaRue, CFO (virtual); Tom Dietz, Director of Operations; Christina Conner, CHRO; Patricia Feeny, Director of Communication; Steve Dickey, Director of Technology & Program Management; Chris French, Service Planning Manager; Ted Stonecliffe, Transit Planner II (Programs); Gregg Thompson, Maintenance Manager; Johnny Cordova, Network Administrator; Linda Galeazzi, Executive Assistant; Sara Sayles, SAMTD Legal Counsel (virtual)

**MINUTES**

**CALL TO ORDER**

**6:31 PM**

A. President Ian Davidson called the meeting to order. Attendance was noted and a quorum was present. The "Safety Moment" topic was about ways to stay healthy throughout the flu season.

**ANNOUNCEMENTS AND CHANGES TO THE AGENDA**

B. President Davidson announced a correction to a clerical error on the agenda under the Consent Calendar – Routine Business Items 2.f. The title should read Award of Contract with GLAS Architects, LLC for the provision of general architectural services.

**FIRST READING OF ORDINANCE No. 2023-01/OPEN PUBLIC HEARING**

C.1 Shall the Board direct the First Reading of Ordinance No. 2023-01 by Title and set a Public Hearing beginning with the December 15, 2022 Board meeting to the January 26, 2023 Board meeting to receive citizen testimony regarding proposed changes to the fare structure, fare programs and fare levels as described in the proposed Ordinance No. 2023-01 in Attachment A pursuant to ORS 198.540 and ORS 267.150?

Presenters: Ted Stonecliffe, Transit Planner II (Programs)

Staff Report: Pages 5-30 of the agenda

President Davidson opened the public hearing with the first reading of Ordinance No. 2023-01 by Title and asking if there was anyone on Zoom or in the audience that wished to give public testimony on the Ordinance. There was no testimony given during the Public Hearing.





**PUBLIC COMMENTS –**

The Board received two written comments for their review and consideration that will be entered into the Minutes for public record [Herein given as Attachment A and B, respectively].

**Nick Fortey, Transportation and Infrastructure Chair, West Salem Neighborhood Association**

Nick Fortey wrote to share the WSNA’s comments on the long-range transit plan that they believe are important for the success of an effective and efficient transit system for the growing region. Fortney stated in his email that for the most part, they found the plan provided needed broad strategic direction, but would benefit from more specificity and clearer direction in a few areas.

**Rebecca Beaman, Elderberry Drive S, 97302**

Rebecca Beaman wrote about the Board planning for future expansion in the Laurel Springs area where bus service used to go through their neighborhood.

**CONSENT CALENDAR**

E. Shall the Board approve the corrected Consent Calendar?

Presenter: President Davidson

Staff Report: Pages 57-74 of the agenda

Moved to approve the corrected Consent Calendar:

3. Approval of Minutes

a. November 17, 2022 Board of Directors Meeting

4. Routine Business

- a. Adopt Resolution No. 2022-05 Amending the CAC Bylaws
- b. Citizens Advisory Committee Member Appointment & Reappointments
- c. Citizens Advisory Committee Chair & Vice-Chair Appointments
- d. STIF Advisory Committee Chair & Vice Chair Appointments
- e. Adopt Resolution No. 2022-06 Amending the PTASP with changes prescribed by the FTA
- f. Award of Contract with GLAS Architects, LLC, for the provision of general **architectural** services

Motion: **Approval of the Consent Calendar**  
 Motion By: **Director Maria Hinojos Pressey**  
 Second: **Director Sara Duncan**  
 Vote: **Motion passed: Carney, Davidson, Duncan, Hinojos Pressey, Holmstrom, and Navarro (6)**



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

**ACTION ITEMS**

G.1 Shall the Board adopt the 2043 Long Range Transit Plan (LRTP)?

Presenter: Ted Stonecliffe, Transit Planner II (Programs)

Staff Report: Pages 109-158 of the agenda

The 2043 LRTP is a comprehensive 20-year planning document for transit and other mobility options in the District’s service area (local and regional). District staff worked with Jacobs Engineering Group, Inc., to incorporate final comments from the project’s Technical Advisory Committee, Citizens Advisory Committee, staff, and the Board with the goal to stay consistent and compatible with local, regional, and state plans for transportation and climate action plans. Public outreach and a comprehensive review of the LRTP will be conducted every five (5) years.

**Motion: Moved to adopt the 2043 Long Range Plan as provided in Attachment A**  
**Motion By: Director Sara Duncan**  
**Second: Director Maria Hinojos Pressey**  
**Vote: Motion passed: Carney, Davidson, Duncan, Hinojos Pressey, Holmstrom, and Navarro (6)**

G.2 Shall the Board authorize the General Manager to execute a contract with CFM Advocates for state and federal legislative advocacy services?

Presenter: Allan Pollock, General Manager

Staff Report: Pages 159-160 of the agenda

The proposed agreement is for a five-year term with two additional one-year options to renew if it is determined in the best interest of the District, for a maximum term of seven (7) years. The District annually budgets funds for legislative advocacy services in the general fund – general managers division. There are adequate funds budgeted in the FY 23 budget. Future years will be budgeted during the annual budget development process.

**Motion: Moved to authorize the General Manager to execute a seven year contract (five base years + two option years) with CFM Advocates for legislative advocacy services for a not-to-exceed amount of \$1,149,960.**  
**Motion By: Director Maria Hinojos Pressey**  
**Second: Director Ramiro Navarro Jr.**  
**Vote: Motion passed: Carney, Davidson, Duncan, Hinojos Pressey, Holmstrom, and Navarro (6)**



G.3 Shall the Board authorize the General Manager to execute a contract with PIVOT Architecture, for the provision of environmental review, property acquisition assistance, design and engineering, and construction management services, for a not to exceed amount of \$1,700,000?

Presenter: Steve Dickey, Director of Technology & Program Management

Staff Report: Pages 161-164 of the agenda

Funding for this proposed contract is included in the Capital Projects Budget of the Districts' Adopted FY2023 Budget. Subsequent years will be approved as part of the annual district budget process as funds are available.

**Motion: Moved to authorize the General Manager to execute a contract with PIVOT Architecture, for the provision of environmental review, property acquisition assistance, design and engineering, and construction management services, for a not to exceed amount of \$1,700,000.**

**Motion By: Director Sara Duncan**

**Second: Director Ramiro Navarro Jr.**

**Vote: Motion passed: Carney, Davidson, Duncan, Hinojos Pressey, Holmstrom, and Navarro (6)**

G.4 Shall the Board approve the 2024-2025 biennium Statewide Transportation Improvement Fund - Formula Fund program projects, for a total amount of \$24,522,087?

Presenter: Steve Dickey, Director of Technology & Program Management

Staff Report: Pages 165--174 of the agenda

There is no financial impact in the current budget. If these projects are approved for funding, the approved amount will be included in the appropriate budget year for the projects for the District, and respectively for other PTSPs in Marion and Polk Counties.

**Motion: Moved to approve the 2024-2025 biennium Statewide Transportation Improvement Fund - Formula Fund program projects, identified in Attachment A, for a total amount of \$24,522,087.**

**Motion By: Director Ramiro Navarro Jr.**

**Second: Director Maria Hinojos Pressey**

**Vote: Motion passed: Carney, Davidson, Duncan, Hinojos Pressey, Holmstrom, and Navarro (6)**

G.5 Shall the Board adopt Resolution No. 2022-07 to approve the federal Section 5310 (ODOT) Projects for the 2024-2025 biennium?

Presenter: Steve Dickey, Director of Technology & Program Management

Staff Report: Pages 175-178 of the agenda



There is no financial impact in the current budget. If these projects are approved for funding, the approved amount will be included in the appropriate budget year for the projects for the District, and respectively for other PTSPs in Marion County.

**Motion:** Moved to adopt Resolution No. 2022-07 to approve the Federal Section 5310 (ODOT) Projects for the 2024-2025 biennium.  
**Motion By:** Director Maria Hinojos Pressey  
**Second:** Director Sara Duncan  
**Vote:** Motion passed: Carney, Davidson, Duncan, Hinojos Pressey, Holmstrom, and Navarro (6)

G.6 Shall the Board authorize the General Manager to execute a contract with CFM Advocates for state and federal legislative advocacy services?

Presenter: Gregg Thompson, Maintenance Manager

Staff Report: Pages 79-180 of the agenda

This project is included as part of the Capital Projects section of the District’s Adopted FY2023 Budget. Funding for the proposed contract is covered through FY20 Low-No 5339(c) and a FY21 Low-No 5339(c) grants, each with different match amounts. Funds for the Del Webb battery electric bus construction project are listed in Table 1:

**TABLE 1**

FTA FUND SOURCE	GRANT PERCENTAGE	MATCH PERCENTAGE	GRANT AMOUNT	MATCH AMOUNT	TOTAL
2020 Low-No 5339(c)	75%	25%	\$100,413	\$33,471	\$133,884
2021 Low-No 5339(c)	85%	15%	\$407,365	\$71,889	\$479,254
5307	80%	20%	\$276,296	\$69,074	\$345,370
<b>Grand Total</b>					<b>\$958,508</b>

**Motion:** Moved to authorize the General Manager to execute a construction contract with EC Electric to support the battery electric bus charging project at Del Webb for an amount not to exceed \$958,508.  
**Motion By:** Director Ramiro Navarro Jr.  
**Second:** Director Sara Duncan  
**Vote:** Motion passed: Carney, Davidson, Duncan, Hinojos Pressey, Holmstrom, and Navarro (6)

**INFORMATION ITEMS** - None

**GENERAL MANAGERS REPORT**



- I. GM Pollock announced that the decorated Cherriots bus won Honorable Mention in Keizer's holiday parade. He thanked Director Hinojos Pressey and Director Navarro and their families for riding the bus in the parade. He noted that there will be no bus service on the Christmas and New Year's Day holidays. He announced that District received the last of their five electric buses from Gillig, and that there was a nice article in the Salem Reporter about Cherriots. He noted that board members will receive a monthly information report from the Communication Division to use when meeting with constituents, and the Service Planning Manager previously sent them a youth ridership report which had some positive news. He said this was the last board meeting for executive assistant, Linda Galeazzi, and he wished everyone happy holidays.

### **BOARD OF DIRECTORS REPORTS**

- J. Shall the Board report on their activities and committee assignments as representatives of Salem Area Mass Transit District?  
Board Report | page 181 of the agenda  
In addition to reporting on the Board's assignments listed on page 181 of the agenda, the Board shared highlights from riding on the decorated Cherriots bus in Keizer's holiday parade. Director Navarro congratulated the Maintenance team for the award the District received for the most beautiful lights on the bus. He thanked the newly appointed members, Chairs and Vice-Chairs of the CAC and STIFAC for their willingness to serve. Director Hinojos Pressey shared a story that she heard from Superintendent Perry about students at McKay High School using their Zero Pass excitedly racing to get on the bus when it came to their bus stop. President Davidson said he was elected as Vice-Chair of the MWCOG Board. Director Duncan reported on the SKATS and MWACT meetings.

### **ADJOURN -**

**8:23 PM**

- K. President Davidson adjourned the meeting.

### **Respectfully Submitted**

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**Ian Davidson, President**





Salem Area Mass Transit District  
 Board of Directors  
 ~ **WORK SESSION** ~  
 December 15, 2022

Courthouse Square – Senator Hearing Room  
 555 Court Street NE, Salem, Oregon 97301

**MINUTES**

**PRESENT:** President Ian Davidson (virtual) Directors Ramiro Navarro Jr., Sadie Carney (virtual 5:30pm), Maria Hinojos Pressey, Sarah Duncan, Bill Holmstrom (virtual 5:12pm)  
**Board**

**Staff** Allan Pollock, General Manager; David Trimble, Deputy General Manager; Christina Conner, CHRO; Denise LaRue, CFO; Deborah Grant, Risk Administrator; Johnny Cordova, Network Administrator; Linda Galeazzi, Executive Assistant

**1. CALL TO ORDER 5:07 PM**

President Ian Davidson called the work session to order at 5:07 p.m. A quorum was present.

**2. PRESENTATION**

Boardroom Dancing: Creating a Healthy and Productive Executive Director/Board Relationship

**Staff report:** YouTube Presentation and handouts

**Presenter:** Deborah Grant, Risk Administrator

Vanessa A. Becker, V Consulting & Associates Inc. (on behalf of the Special Districts Association of Oregon (SDAO))

The presentation shared the principles of successful board and executive partnerships, and the roles and responsibilities of each.

**3. WORK SESSION ADJOURNED 6:26 PM**

Submitted by:  
 Linda Galeazzi, CMC  
 Executive Assistant/Clerk of the Board







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

**December 29, 2022**

**Index of Board Actions**

<b><u>Action</u></b>	<b><u>Page</u></b>
Moved to rescind Resolution No. 2022-06 with the adoption of Resolution No. 2022-08 amending the Public Transportation Agency Safety Plan.....	<b>2</b>



Salem Area Mass Transit District  
**BOARD OF DIRECTORS MEETING (Virtual)**  
**December 29, 2022**

**PRESENT:**

Board: President Ian Davidson (virtual), Directors Ramiro Navarro Jr., Maria Hinojos Pressey, Bill Holmstrom

Staff: Allan Pollock, General Manager; David Trimble, Deputy General Manager; Denise LaRue, CFO; Tom Dietz, Director of Operations; Ben Fetherston, SAMTD Legal Counsel

Absent: Director(s) Sadie Carney and Sara Duncan

**MINUTES**

**CALL TO ORDER**

**6:17 PM**

A. President Ian Davidson called the meeting to order. Attendance was noted and a quorum was present.

**ACTION ITEMS**

B.1 Shall the Board adopt Resolution No. 2022-08 amending the Public Transportation Agency Safety Plan (PTASP)?

Presenter: David Trimble, Deputy General Manager

Staff Report: Pages 3-6 of the agenda

As a result of the Bipartisan Infrastructure Law, deified in 49 U.S.C. 5329(d) there are new requirements that must be included into the District’s PTASP by December 31, 2022. The District made the necessary changes to its PTASP to include all of the new requirements established by the Federal Transit Administration (FTA) and the Board adopted Resolution No. 2022-06 to amend the Plan at its December 15, 2022 meeting. However, under the new FTA requirements all internal stakeholder signatures must be completed prior to Board action. The Safety Committee met on December 22, 2022 and approved and signed the PTASP as written.

**Motion: Moved to rescind Resolution No. 2022-06 with the adoption of Resolution No. 2022-08 amending the Public Transportation Agency Safety Plan.**

**Motion By: Director Maria Hinojos Pressey**

**Second: Director Ramiro Navarro Jr.**

**Vote: Motion passed: Davidson, Navarro, Hinojos Pressey, Holmstrom (4)**



**ADJOURN -**

**6:21 PM**

K. President Davidson adjourned the meeting.

**Respectfully Submitted**

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**Ian Davidson, President**





## BOARD MEETING MEMO

Agenda Item F.2.a

**To:** Board of Directors

**From:** Allan Pollock, General Manager

**Date:** January 26, 2023

**Subject:** Adoption of Resolution No. 2023-01 to support the Statewide Transportation Improvement Fund Discretionary and Statewide Transportation Network Projects

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### ISSUE

Shall the Board adopt Resolution No. 2023-01 (**Attachment A**) to support the Statewide Transportation Improvement Fund Discretionary and Statewide Transportation Network Projects for the 2023–2025 biennium?

### BACKGROUND AND FINDINGS

In 2017, the Oregon State Legislature passed HB 2017 establishing the largest transportation funding bill ever passed in the state of Oregon. Included in HB 2017 was the first ever revenue source dedicated to public transportation statewide. This funding source was named the Statewide Transportation Improvement Fund (STIF). These funds are allocated on a biennial basis. The next funding cycle is for the 2023 -2025 biennium and is divided into two allocation models. One is a formula distribution approved by the Board at the December 15, 2022 meeting. The other is a discretionary model with two parts, the STIF Discretionary, and the Statewide Transportation Network (STN) programs.

Applications from the Public Transportation Service Providers (PTSP) are submitted directly to ODOT–Public Transit Division (ODOT-PTD) for review to determine eligibility. After this screening, the projects are shared with the local Area Commission on Transportation (ACT), and Salem Area Mass Transit District, the local Qualified Entity (QE) for Marion and Polk counties. The ACT and QE review is to determine if they support or reject the projects and provide a record of this decision to ODOT–PTD. The project list and applications reviewed for support include, not just projects based in the QE's area, but any proposed project that crosses through or into the QE's area.

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

**TABLE: 1 – Project Requests**

<b>PTSP Name</b>	<b>Project Description</b>	<b>Project Total Request</b>	<b>Local Match</b>	<b>Grant Request</b>
City of Monmouth	Monmouth-Independence	\$625,000 *	\$125,000 *	\$500,000 *
	Trolley Pilot Project - Operations	\$625,000 *	\$ 62,500 *	\$562,500 *
SAMTD	Right-Size vehicles for Kuebler Link shuttle service and local neighborhood circulator service. Four vehicles in total for this project.	\$1,070,520	\$214,104	\$856,416

**\* - Indicates 80/20 match ratio. \* - Indicates 90/10 match ratio.**

Under OAR 732-044-0005(4)(a) qualifying entities may be eligible for 10% local match instead of the standard 20% local match. The final determination of eligibility is made by ODOT-PTD staff.

The Statewide Transportation Improvement Fund Advisory Committee (STIFAC) met on December 15, 2022 to review the projects and made a recommendation to support the projects identified in **Table 1**. ODOT-PTD provided an optional step to prioritize the list of projects, however the STIFAC chose not to prioritize the projects and allow ODOT-PTD to make the final decision.

The purpose of the STIF Discretionary and STN programs is to enhance transit service throughout the state and provide a stable source of revenue to continue with those improvements for many years to come.

### **FINANCIAL IMPACT**

There is no financial impact in the current budget. If these projects are approved for funding, the approved amount will be included in the appropriate budget year for the projects for SAMTD, and respectively for other PTSPs in Marion and Polk Counties.

### **RECOMMENDATION**

The STIFAC recommends the Board adopt Resolution #2023-01 to support the Statewide Transportation Improvement Fund Discretionary and Statewide Transportation Network Projects for the 2023–2025 biennium.

## **PROPOSED MOTION**

**I move that the Board adopt Resolution #2023-01 to support the Statewide Transportation Improvement Fund Discretionary and Statewide Transportation Network Projects for the 2023–2025 biennium.**



## Resolution No. 2023-01

### APPROVAL OF 2023-2025 STATEWIDE TRANSPORTATION IMPROVEMENT FUND

**WHEREAS**, the Salem Area Mass Transit District, hereafter referred to as “District,” is designated as the Qualified Entity (QE) in the Statewide Transportation Improvement Fund (STIF) Program for Marion and Polk Counties under ORS 184.751 and OAR 732-040-0005 (5) (c) and 732-040-0005 (26); and,

**WHEREAS**, the District is required to conduct a review of projects submitted for funding from the STIF Discretionary and Statewide Transportation Network (STN) within the QE Area of Responsibility; and,

**WHEREAS**, as a result of the review will take action identifying which projects to support for funding; and,

**WHEREAS**, Table 1 attached to this resolution contains the projects and project costs for projects proposed for funding through the STIF Discretionary or STN programs for the 2023-2025 biennium;

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

**THAT**, the Board adopt Resolution No. 2023-01 to approve the list of projects and funding amounts identified in Table 1 attached to this resolution; and direct the General Manager to submit the a record of the decision by the Board by February 6, 2023 as is required by the Oregon Department of Transportation.

**ADOPTED** by the Board of Directors on the 26th day of January 2023, and effective thereupon.

**ATTEST:**

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

\_\_\_\_\_  
Recording Secretary

RESOLUTION No. 2023-01 Continued



**TABLE: 1 – Project Requests**

<b>PTSP Name</b>	<b>Project Description</b>	<b>Project Total Request</b>	<b>Local Match</b>	<b>Grant Request</b>
City of Monmouth	Monmouth-Independence Trolley Pilot Project - Operations	\$625,000 * \$625,000 ‡	\$125,000 * \$ 62,500 ‡	\$500,000 * \$562,500 ‡
SAMTD	Right-Size vehicles for Kuebler Link shuttle service and local neighborhood circulator service. Four vehicles in total for this project.	\$1,070,520	\$214,104	\$856,416

**\* - Indicates 80/20 match ratio. ‡ - Indicates 90/10 match ratio.**

Under OAR 732-044-0005(4)(a) qualifying entities may be eligible for 10% local match instead of the standard 20% local match. The final determination of eligibility is made by ODOT – Public Transit Division (ODOT – PTD) staff.

# Oregon Department of Transportation



## STIF Discretionary and Statewide Transit Network Application: FY 2023-25

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### Applicant Information

**Agency Legal Name**

City of Monmouth

**Project Title**

Monmouth-Independence Trolley

**Agency Legal Address**

151 Main Street W., Monmouth, Oregon 97361

**Application Contact Name**

Fred Evander

**Application Contact Title**

Planning Manager

**Application Contact Email Address**

fevander@ci.independence.or.us

**Application Contact Phone Number**

(503) 837-1168

**Name of Person Signing Agreement**

Marty Wine

**Title of Person Signing Agreement**

City Manager

**Email Address of Person Signing Agreement**

mwine@ci.monmouth.or.us

**Phone Number of Person Signing Agreement**

(503) 751-0146

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### Agency Information

**1. Transit Agency Type**

City

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

Yes

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

Deviated Fixed Route

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

No

## **Risk Assessment Information**

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

No

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

Yes

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

Combined

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

Yes

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

No

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

No

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

Yes

## **Agency Qualifications**

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

The Monmouth-Independence Trolley is a joint effort between several partners.

Monmouth and Independence are municipalities organized under ORS Chapter 221. The cities have successful experience in identifying funds for local match, managing grant awards, managing schedules and cost controls. Both cities additionally have effective operational and management staff and controls in city management, public works, and planning. The project is the first local transit service that will be operated by the cities.

The service will begin in January 2023 and be operated by Cherriots (Salem Area Mass Transit District). Cherriots offers the expertise and capacity to operate the system, track ridership and make enhancements.

The City of Monmouth, the financial manager for the project, further has financial management systems

that meet standards for financial reporting, accounting records, internal control, budget control, allowable cost, source documentation, and cash management.

## 12. Certification of Compliance

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

Yes

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

Yes

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

The pilot will be operated by Cherriots (Salem Area Mass Transit District) through an intergovernmental agreement (IGA). The IGA will be signed by the Cities of Monmouth, Independence and Cherriots. Cherriots is familiar with the requirements for operating transit service that is funded with STIF funds. Cherriots will use the service plan that is laid out in the IGA as well as the standards that are used for the rest of their services to ensure quality control, compliance and reporting.

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

Predominantly serves or provides access to and from rural communities

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

No

## Project Information

### 16.A Project Title

Monmouth-Independence Trolley

### 16.B Describe the project to be funded. Clearly describe what the requested fund award would be used to accomplish, detailing the specific tasks and deliverables. Where relevant, identify the origin and destination of the proposed service as well as each municipality visited along the route. Please see page 7 of the application instructions for additional guidance on writing a project description.

This grant application will help to fund the Monmouth-Independence Trolley pilot project. Grant funds will specifically be directed to transit operations on the route including funding operator/administrator wages and operations costs such as fuel and maintenance.

The Monmouth-Independence Trolley project has been developed through a partnership between the City of Monmouth, City of Independence, Western Oregon University and Cherriots (i.e., the Salem Area Mass Transit District), as a means to offer local transit service in the communities. The project is intended to provide a deviated fixed route that offers frequent reliable connections between the downtowns, shopping areas and Western Oregon University. Connections to regional routes will also be provided including to the regional express service provided by Cherriots Route 40X and to the pilot project to offer transit service between McMinnville and Corvallis along W Highway 99.

The trolley will travel along OR-51 and OR-194 in Monmouth and Independence. Stops will be placed in the following locations:

- Riverview Park/C Street in Downtown Independence
- 2nd Street in Downtown Independence
- 5th Street
- 8th Street
- 12th Street
- Gun Club Road
- 16th Street/Central High School
- Ash Creek Station
- Atwater/Hefley
- Ecols Street
- Main Street Park/Warren Street in Downtown Monmouth
- Western Oregon University

Key activity centers that will be served by the route include the Independence Hotel, downtown Independence, the Central Plaza Shopping Center, Central High School, Ash Creek Station, downtown Monmouth and Western Oregon University. Area parks such as Riverview Park in Independence and Main Street Park in Monmouth will also be served.

The service will operate as a fixed route between Monmouth and the Riverview Park in Independence and will allow for scheduled deviations up to 0.75 miles off the main route. Off-route pickups and drop offs will require reservations (24 hours in advance or the day before) mostly to serve parts of the community that are beyond a 5-minute walk from the main route, as well as certified ADA passengers. The service will provide approximately 75 one-way trips Monday through Saturday (2-3 trips per hour) and accommodate up to one deviation for each one-way trip. The limitation on the number of deviations per trip will allow the service to stay on schedule and maintain level of service and reliability for all passengers.

The trolley will operate every day of the year excluding major holidays (New Year's Day, Thanksgiving Day and Christmas) through a 2.5-year period intended to develop the market and evaluate the long-term feasibility of the operation. Service will be provided Monday through Friday from 7:00 a.m. to 9:00 p.m., Saturday from 8:00 a.m. to 10:00 p.m., and Sundays and federal holidays (other than major holidays) from 8:00 a.m. to 6:00 p.m.

**17. What is the minimum project cost that will still allow your project to proceed?**

\$420,000.00

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

STIF Discretionary

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

The Monmouth-Independence Trolley is a pilot project that will:

- Offer individuals a convenient, reliable alternative to private automobile travel in the cities; and
- Shape the growth of the communities into the future.

Independence and Monmouth are rapidly growing, and much of this growth is occurring in areas unserved by public transportation. This project will help create a local public transit backbone for the communities; address transportation costs/lack of options, which disproportionately impact low-income residents; and foster the place-based economic growth of the cities.

The project will connect downtown Independence and downtown Monmouth and allow the increasingly vibrant areas to further build off each other - opening more accessible opportunities for work, shopping, recreation and dining as a result of the route. Connecting the areas will also better link student housing at Western Oregon University, and lower-income areas, to goods, services, and recreation in the cities.

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

No

## **Oregon Transportation Commission Investment Priorities**

### **Equity and Public Transportation Service to Low-Income Households**

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

A significant portion of Independence and Monmouth is classified as vulnerable and/or historically marginalized. This project will support and improve access for these individuals by providing an alternative to costly automobile ownership and operation.

Census county division data for Independence and Monmouth (which includes a small population outside of the cities) revealed that:

- 24% of the population is Hispanic or Latino.
- 24% of the households are below federal poverty line, or 1,639 out of 6,785 households.
- 1/3 of households have an annual income below \$40,000, and more than 1/2 of the households have an annual income below \$60,000.
- 11.9% of the population has a disability.
- 4% of the households do not have a vehicle.

Transportation costs add to the burden for many of the vulnerable individuals and households, which devote greater proportions of their incomes to the expenses than higher-income populations. In 2022, the average cost of owning and operating a private vehicle (assuming 15,000 annual miles) was \$10,729 (source: American Automobile Association). This total represented 16.2% of the mean household income for Independence (\$66,124) and 17.2% of the income for Monmouth (\$62,039). The trolley is intended to provide an alternative to this costly automobile ownership.

In addition to serving historically marginalized and low-income communities, the route will effectively serve seniors and individuals with disabilities. The main route will travel along OR-51 and OR-194 in Independence and Monmouth, though deviations may be requested for certain trips. Off-route pickups and drop offs will require reservations (24 hours in advance or the day before) and will serve parts of the community that are beyond a 5-minute walk from the main route, as well as certified ADA passengers. The service will provide about 75 one-way trips Monday through Saturday (2-3 trips per hour) and will accommodate one deviation per one-way trip. The additional number of potential deviations will be a significant service improvement compared to the existing Cherriots Route 45, which provides 6 one-way trips per day.

### **Coordination of Public Transportation Services**

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

The Monmouth-Independence Trolley pilot project is a coordinated effort between the City of Monmouth, the City of Independence, Western Oregon University (WOU) and Cherriots (i.e., the Salem Area Mass Transit District) to provide effective transit service in Independence and Monmouth.

The project is intended to enhance local transit operations, by offering a deviated fixed-route service that offers frequent reliable connections between the downtowns, shopping areas and WOU. Links to regional routes will also be provided including connections to the regional express route provided by Cherriots (Route 40X) and the pilot project to offer transit service between McMinnville and Corvallis along W Highway 99.

Technical operations of the service have been designed with the passenger in mind.

- The trolley will run along a straight short route to achieve twenty-minute headways (a frequency that is far superior to existing transit service in the community) and the route will allow one deviation per trip. Route deviations will be scheduled through the Cherriots Call Center.
- Trolleys will be equipped with vehicle-tracking software that allows riders to easily locate a trolley when looking at a website or web application.
- Details of the service will be incorporated into the marketing and website for Cherriots (who will act as the contractor for the service) and will be promoted through the media channels of each of the partners.

Additionally, vehicle-tracking software, which has been purchased through TransLoc as part of the project, will also allow easy monitoring of ridership and provide key information to improve performance of the service including the number of deviations, actual headways, and time periods when delays tend to occur. This data will be downloadable into a variety of formats, including GTFS and reports suitable for the National Transit Database.

Further, the partnership between Cherriots, the cities and WOU will allow the agencies to see where duplication between transit services exist and efficiencies can occur. The collaborative effort will improve the resource sharing between the agencies and ultimately improve the overall experience for passengers riding in Monmouth and Independence.

## **Environmental and Public Health**

**23. Describe how this project would go beyond providing an alternative to personal car use to reduce greenhouse gas emissions, reduce pollution, and/or support positive health outcomes. How does this project support applicant's climate planning efforts?**

The trolley will offer a fun, cheap, and reliable service that goes beyond providing an alternative to personal automobiles and takes major steps towards achieving the cities' climate goals.

In 2020, Independence completed their Vision 2040 Plan with the input of over 2000 Independence community members. The plan included several focus areas that promoted the development of economically sustainable and environmentally conscious transportation and sought to establish "Independence as a leader in...resource and energy conservation, and climate action." (p. 10, Independence Vision 2040 Plan).

Several trolley details will help the cities achieve this and other climate-related goals:

The service will be free and frequent making it a desirable travel mode for many. The service will operate on a normal weekday from 7:00 am to 9:00 pm, typically running every 20 minutes. Service will also run on the weekends.

The service will be highly visible, operating in the center of the community, and will easily accommodate individuals on bicycles, on scooters, and on foot. Comfortable walking and biking connections will be available to the route from surrounding neighborhoods and trolleys will be equipped with a bike rack.

The trolley will be an environmentally responsible alternative that reflects the cities' heritage. A rail line once connected the communities, and by adding a visible component of historical identity, the trolley will intertwine a sense of place with a mission of resource stewardship. Popular events in the communities will be branded with the tagline "travel by trolley" as a means of promoting fun and environmentally conscious travel, highlighting sustainability efforts by the communities, and addressing the logistical challenges of events (i.e. limited parking).

The service will additionally support the development of new mixed-use buildings in the communities, further helping sustainability goals by reducing the number and length of trips. To this end, the City of Independence has received a Transportation and Growth Management grant to consider how an auto-oriented strip mall, and surrounding undeveloped land, can be redeveloped around the trolley line. The placemaking and inclusion of new housing units envisioned for the area will create a rural version of "Transit-Oriented Development," creating a complete neighborhood around schools and shopping that offers individuals the opportunity to live without a car.

## **Safety, Security, and Community Livability**

### **24. Describe how the project would increase use and participation in active transportation, and support connections between transit and other travel modes like biking and walking.**

The trolley service has been designed to encourage active transportation in Monmouth and Independence. The route will be a local service, centrally located within the communities, and will be easily accessible from surrounding neighborhoods.

A variety of features have been incorporated to encourage a highly effective combination of active transportation and the operation of the trolley:

- **Central location.** The trolley has been designed to run through the geographic center of Monmouth and Independence and to serve all the major destinations within the communities. Stores such as Roth's and Waremart, as well as major destinations such as downtown Independence, Monmouth and Western Oregon University will all be served by the route.
- **Comfortable first and last mile for cyclists and pedestrians.** Nonmotorized connections to stops along the route will largely be on or along low-volume residential roadways that have sidewalks – comfortable routes for people to get to and from the trolley.
- **Bike racks on the trolley.** A two-space bike rack will be provided on the front of all trolleys – encouraging riders to cycle to the trolley stop.
- **Frequent trips.** The service will run fast to ensure frequent trips that individuals can rely on for travelling around town. Route headways will typically be every twenty minutes which will allow individuals to know that, even if they miss a trolley, the next one will not far behind.
- **Vehicle-tracking software.** Vehicle-tracking software will be utilized to allow individuals to find their trolleys and make the best use of their time before it arrives at their stop. Allowing individuals to effectively manage their time will help limit any perceived "waste of time" associated with riding the service.
- **Free fares.** Fares for the trolley will be free for at least the first year of service. With this use of a complementary rides, individuals will feel free to hop on and off the service as needed, without having to



worry about additional fare to ride.

This combination of features should encourage individuals to use the trolley as an extension of any active transportation mode that they utilize.

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

OR-51 and OR-194 between Monmouth and Independence is a road that varies between two and three lanes and experiences significant vehicle and pedestrian traffic. At present, the roadway:

- Is one of the two main connections between Independence and Monmouth.
- Has the majority of commercial activities in the jurisdictions (as well as Central High School).
- Has high volumes of traffic, especially during peak hours. In 2021, OR-51 in Independence carried an average of 11,056 vehicles per day.
- Contains significant pedestrian traffic but has few designated and safe pedestrian crossings.
- Has incomplete and insufficient bike lanes, which encourages many individuals to cycle on the sidewalks as a result.

Given the number of vehicles, cyclists, and pedestrians and the abundance of activities along the street, the roadway also experiences significant numbers of accidents including vehicle/pedestrian and vehicle/cyclist collisions.

The trolley has been designed to help with these issues.

- The trolley will function as a people mover that helps individuals travel quickly and safely between key destinations in Independence and Monmouth. The frequency and reliability of the route will ensure that certain trips (such as pick up and drop off for high school) will be able to be made as efficiently by transit. Ideally this will limit the overall and peak number of trips on the road.
- The service will offer a safe alternative mode for individuals to travel along the route. At present, many individuals avoid walking or cycling along portions of road due to the heavy traffic volumes present. The trolley will allow individuals to hop on the trolley or put their bikes on the vehicle and ride till they can be dropped off at a location where they feel safe.
- The route will offer stops in locations where safe crossings can occur. Stops have been largely placed where existing crosswalks exist and stop lights can offer a protected crossing opportunity. Additionally, if awarded, Safe Routes to School grants submitted by Independence and Monmouth during the previous funding cycle will further enhance crossing opportunities for the anticipated stops.

Together these features will enhance the safety for pedestrians, cyclists and motorists along the OR-51 and OR-194 corridor.

## **Statewide Transit Network Connections**

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

The cities of Independence and Monmouth are currently served by two Cherriots routes – the 40X and the 45 – as well as a private service provided by Western Oregon University (WOU). None of the routes however effectively serves the local transit needs of the community or provides frequent, reliable connections between areas of housing and commercial uses and activities within the cities.

The Cherriots 40X service is a regional express service that connects Dallas, Monmouth, Independence,

and Salem and offers ten one-way trips per day.

- Headways for the service range between 1 hour during peak times to 3 hours late at night.
- Two stops are present in Monmouth and three stops are available in Independence.
- Fares for the route are based on Cherriots' regional structure.
- No price break or pass is available for WOU students.

Due to the regional nature of the route, and the limited outreach that has occurred to the university, local use of the service has been minimal.

To offer an alternative that better serves local trips:

- Cherriots established Route 45 – a service that offers a more local, deviated fixed-route option (that also addresses paratransit needs). The route connects Dallas, Monmouth and Independence but only offers 6 one-way trips per day (with a frequency of one trip every two hours). Due to the similar nature of the route to the 40X but with less frequent headways, the ridership on the service has been minimal.
- WOU established Wolf Ride – a service which offers Western Oregon University students a ride who would otherwise walk alone at night. Students can call to request a ride between the hours of 5:00 p.m. and 12:00 a.m., every day of the week and ride requests are taken on a first come, first served basis. Just one van is operated on the route.

While these services have been valuable, neither of the services have addressed the fundamental need for effective local transit service in the community.

The trolley has been designed to address the gap that remains in the provision of effective local transit service – providing a more frequent and reliable local service along a highly traveled corridor, and addressing the transit needs of populations that are traditionally dependent on transit service, such as college students and lower income populations. The route will additionally enhance local connections with existing routes (the 40X) and new routes being added to the Statewide Transit Network (such as the 99W pilot).

## **Funding and Strategic Investment**

### **27. Describe why investment in this project makes sense from both the perspective of current need and long term Oregon transit needs.**

The Monmouth-Independence Trolley is a pilot project that will leverage a strategic investment made by the Oregon State Legislature to create a more walkable sustainable growth pattern within Independence and Monmouth. The project will serve Western Oregon University (WOU), the oldest four-year public institution in Oregon, offering students at the school opportunities to better travel throughout the communities without the use of a personal automobile, and will address a need for improved local transit service for populations such as the disabled, elderly, or lower income.

The project is strategic for a number of reasons:

- The project will link downtown Independence and downtown Monmouth and allow the two increasingly vibrant areas to further build on each other. With the connection, significantly more opportunities to walk or bike to work, shopping, recreation and dining experiences will be provided. Connecting the areas will additionally improve the student experience for WOU students.
- The project will act as a basis around which to build new portions of the community . Rapid development is ongoing in both Independence and Monmouth, and much of the growth is occurring in portions of the communities with limited chance to ever be served by transit. This project will create a transit backbone for the communities, which will serve existing pockets of density, including lower-income and subsidized housing, and will be utilized by the cities to build more dense housing around. The City of

Independence, in particular, has utilized the future trolley operation as a reason to apply for (and receive) a Transportation and Growth Management Grant to reconceptualize an auto-oriented area that includes a strip mall and one of the remaining undeveloped commercially and multifamily zoned areas in the community. The resultant project is anticipated to articulate a rural form of “Transit-Oriented Development” oriented around the trolley with clear strategies to achieve a more vibrant urban and walkable form for the area – a strategic approach to accommodate growth while limiting reliance on the personal automobile.

This combination of leveraging existing funding sources and using the trolley to further promote the smart growth of Independence and Monmouth makes funding for the project a wise investment of the state’s transit dollars.

**28. If this project will last beyond the 2023-25 biennium, describe the plan for ongoing funding including match. If not applicable, type N/A.**

The trolley pilot project is anticipated to operate from January 2023 to July 2025. After the service has been deemed to be effective, the cities will work with partners, businesses and residents to fund the service through a mixture of state grants, the reallocation of existing transit funds, business donations, and potentially the collection of fares.

Key strategies that the communities will use to fund the service include:

- Working with transportation service providers to determine whether existing resources can be reallocated to continue the service. The cities will particularly work with Western Oregon University (who operates Wolf Ride – an on-demand ride provider) and Cherriots (who operates Route 45) to determine whether any of the funds to operate those services can be reallocated to the trolley. In comparing ridership data of the services once the pilot project has been established, the cities anticipate that the trolley will be the most used, efficient local transit service in the community, and therefore the best continued use of funds.
- Working with area businesses to help sponsor the service. The cities will additionally work with major employers in the area, as well as key business interests such as the Independence Hotel, to help fund the service. Once the communities have data about the ridership and success of the service, the cities will approach the various businesses to determine ways for them to support the operations.
- Pursuing State Transit Funding. The cities will lastly pursue state funding to help fund the service. Key potential funds that the cities will pursue include State Transportation Improvement Formula Fund and the 5311 Formula Grants for Rural Areas.

With this potential mix of funding options, the cities have a clear vision of how the frequent, reliable service provided by the trolley will be funded long term.

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

The trolley pilot project has been funded in part by an allocation from the Oregon State Legislature. The allocation has paid for three trolley vehicles, and will pay for vehicle-tracking software, marketing and roughly two years of service. This proposed grant is intended to extend operations till July 2025, when the next round of STIF funding is available.

## **30. Capital Asset Purchases**

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

No capital assets will be purchased with the funds. The purchase of trolleys and vehicle-tracking software has occurred with the funds distributed as part of the original legislative allocation for the project.

## Project Details

### Task Category

Operating

## Operating

### Give a brief (1-3 sentences) description of this project cost.

This grant application will help to fund the Monmouth-Independence Trolley pilot project. Grant funds will specifically be directed to transit operations on the route including funding operator/administrator wages and operations costs such as fuel and maintenance. Remaining funds for the pilot have been provided by an allocation provided by the Oregon State Legislature.

### Total Task Cost (Grant Amount + Match Amount)

\$625,000.00

## Project Task and Match Amounts

### 20% Match Rate Calculations

#### Grant Amount - STIF Discretionary/STIF

Intercommunity (80% State Share)

\$500,000.00

#### Match Amount - STIF Discretionary/STIF

Intercommunity (20% Local Share)

\$125,000.00

### 10% Match Rate Calculations (For Qualified Applicants)

#### Grant Amount - STIF Discretionary/STIF

Intercommunity (90% State Share)

\$562,500.00

#### Match Amount - STIF Discretionary/STIF

Intercommunity (10% Local Share)

\$62,500.00

## Application Totals

### Match Sources

Match Sources	Amount
State	\$100,000.00

Are matching funds of at least 20% of project costs available if the project is awarded?

Yes

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

100%

Percent of funds used for fixed route transportation

0%

**Note on Application Totals:** If applying for 5311(f) Operating, a 50% match rate is applied to identified Operating costs. However, the application form automatically applies a 20% match rate to the full Project

Cost, including Operating costs. Therefore, Section 5311(f) applicants should ensure the accuracy of the Total Task Cost for each Task Category, as the 20% match rate will only apply to non-Operating costs in a 5311(f) grant award. The form is unable to calculate an accurate application total using two different match rates.

### Application Totals Summary By Task - 20% Match Rate

Task Category	Task Project Cost	Task Grant Amount	Task Match Amount
Vehicle Expansion	\$0.00	\$0.00	\$0.00
Vehicle Replacement	\$0.00	\$0.00	\$0.00
Equipment Purchase	\$0.00	\$0.00	\$0.00
Facility Purchase	\$0.00	\$0.00	\$0.00
Signs/Shelters	\$0.00	\$0.00	\$0.00
Planning	\$0.00	\$0.00	\$0.00
Project Administration	\$0.00	\$0.00	\$0.00
Operating	\$625,000.00	\$500,000.00	\$125,000.00
Preventive Maintenance	\$0.00	\$0.00	\$0.00
Mobility Management	\$0.00	\$0.00	\$0.00
	<b>Total Project Cost: \$625,000.00</b>	<b>Total Grant Amount: \$500,000.00</b>	<b>Total Match Amount: \$125,000.00</b>

### Application Totals Summary By Task - 10% Match Rate (For Qualified Applicants)

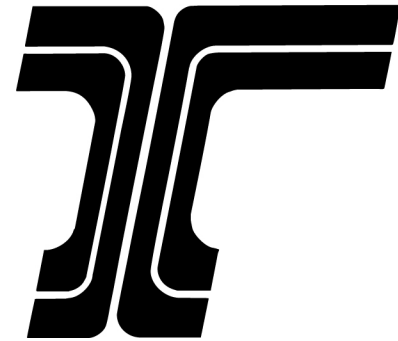
Task Category	Task Project Cost	Task Grant Amount	Task Match Amount
Vehicle Expansion	\$0.00	\$0.00	\$0.00
Vehicle Replacement	\$0.00	\$0.00	\$0.00
Equipment Purchase	\$0.00	\$0.00	\$0.00
Facility Purchase	\$0.00	\$0.00	\$0.00
Signs/Shelters	\$0.00	\$0.00	\$0.00
Planning	\$0.00	\$0.00	\$0.00

Project Administration	\$0.00	\$0.00	\$0.00
Operating	\$625,000.00	\$562,500.00	\$62,500.00
Preventive Maintenance	\$0.00	\$0.00	\$0.00
Mobility Management	\$0.00	\$0.00	\$0.00
	<b>Total Project Cost:</b> <b>\$625,000.00</b>	<b>Total Grant Amount:</b> <b>\$562,500.00</b>	<b>Total Match Amount:</b> <b>\$62,500.00</b>

**Document Upload (Optional)**

trolley\_route.pdf

# Oregon Department of Transportation



## STIF Discretionary and Statewide Transit Network Application: FY 2023-25

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### Applicant Information

**Agency Legal Name**

Salem Area Mass Transit District

**Project Title**

Right-Size Vehicles

**Agency Legal Address**

555 Court St NE, Salem, Oregon 97301

**Application Contact Name**

Peggy Greene

**Application Contact Title**

Grants Administrator

**Application Contact Email Address**

peggy.greene@cherrriots.org

**Application Contact Phone Number**

(503) 361-7530

**Name of Person Signing Agreement**

Peggy Greene

**Title of Person Signing Agreement**

Grants Administrator

**Email Address of Person Signing Agreement**

peggy.greene@cherrriots.org

**Phone Number of Person Signing Agreement**

(503) 361-7530

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### Agency Information

**1. Transit Agency Type**

Mass Transit District

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

Yes

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

Fixed Route

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

No

## **Risk Assessment Information**

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

Yes

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

Yes

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

Combined

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

Yes

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

Yes

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

Yes

**9.A If yes, did the audit result in one or more findings?**

Yes

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

Yes

## **Agency Qualifications**

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

SAMTD has the legal authority, capacity, and ability to implement the project. There are no outstanding legal issues that would, individually or in the aggregate, impair the ability of SAMTD to implement the project. SAMTD has dedicated procurement, accounting, grants, project management, and operations staff who coordinate projects from planning to closeout. SAMTD has hired some new staff in the last two years, all with significant experience and training, and resumes are available upon request. A recent audit finding presented an opportunity to refine finance procedures for reporting on the Schedule of Expenditures of Federal Awards (SEFA). Staff have the time and budgetary authority to allocate resources to accomplish the project. They will also report on the project progress on a quarterly basis as is required by the ODOT Public Transportation Division for all of the grants issued to qualified entities and public transportation



service provide.

## 12. Certification of Compliance

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

Yes

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

No

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

Not applying for 10% match reduction

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

No

## Project Information

### 16.A Project Title

Right-Size Vehicles

**16.B Describe the project to be funded. Clearly describe what the requested fund award would be used to accomplish, detailing the specific tasks and deliverables. Where relevant, identify the origin and destination of the proposed service as well as each municipality visited along the route. Please see page 7 of the application instructions for additional guidance on writing a project description.**

This project would add four low-floor cutaway buses to be operated within the urban growth boundary of the SAMTD service area. These buses would help SAMTD further right-size the fleet by using more appropriately-sized vehicles for the following local routes: 26 - Glencreek/Orchard Heights, 27 - Glencreek/Eola, 12 - Hayesville Drive, and 14 - Windsor Island Road. The buses would start by serving the neighborhood circulator routes listed above with the option of using them for micro transit in the future. These circulator routes tend to have lower ridership and travel on narrow neighborhood roads instead of larger corridors. The low-floor cutaway buses are smaller than the buses currently used so they would allow SAMTD to be less intrusive in these neighborhoods and would be safer to operate on the narrow roads. The buses would also serve as expansion vehicles to allow SAMTD to use its larger buses to add frequency to existing routes or to add new routes. In order to add additional weekday service during peak hours, SAMTD will need these vehicles.

**17. What is the minimum project cost that will still allow your project to proceed?**

\$535,260.00

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

STIF Discretionary

STIF Intercommunity Discretionary

FTA Section 5311(f) Intercity

**19. Why is this an important project? What are the consequences of this project not receiving**

**funding?**

This project increases transit accessibility by allowing SAMTD to add routes and to go deeper into neighborhoods that are unable to be currently provided service due to the 35 and 40-foot buses that make up Cherriots Local fleet currently. It improves roadway and community safety and livability because more people will be able to access transit in their own neighborhoods instead of having to use and/or cross busy streets to get to a bus stop. This project reduces greenhouse gas emissions by making it easier for people to access public transit, making them more likely to choose public transit over using personal vehicles as well as reducing the need for people to drive to access transit. This project also enhances the ease of use of the Statewide Transit Network by making it easier for pedestrians and bicyclists to access transit. One consequence of this project not receiving funding would be a continuation of people using busy streets to access transit stops. Another consequence would be SAMTD not having the capacity to add new routes.

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

No

# **Oregon Transportation Commission Investment Priorities**

## **Equity and Public Transportation Service to Low-Income Households**

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

The project would allow SAMTD to reach deeper into the neighborhoods served and to explore operating service with fixed-routes and schedules, as well as exploring new, more dynamic service types such as micro transit. Data from the U.S. Census American Community Survey (2015-2019) shows that 33.5% of the population within the Salem-Keizer urban growth boundary (UGB) are low-income households living below 200% of the Federal Poverty Level. This is slightly more than the average for Marion and Polk counties, which is 32.7%. The minority population is 31.8% of the total for the Salem-Keizer UGB, which is slightly higher than the average for Marion and Polk counties, which is 28.9%. Thus, this project would support and improve access to these vulnerable populations and historically marginalized communities as service would be increased, utilizing smaller vehicles in areas that are not currently served due to vehicle size constraints. This service increase would directly impact access for vulnerable populations and historically marginalized communities with increased service to health care, jobs, grocery shopping, and social service appointments that are currently not available.

## **Coordination of Public Transportation Services**

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

The project will add more coverage and more frequency for current routes. With smaller buses, SAMTD would be able to explore traveling down streets into neighborhoods that we cannot at this time, due to vehicle size constraints. In the 2022 needs assessment, SAMTD heard from riders that expanding into the neighborhood was needed for the service area. This would improve the passenger experience for people who currently have to cover a long distance in order to reach transit service. Being able to take public transit into the neighborhoods where people live directly improves their access to other regional connections already taking place in Salem and Keizer with multiple transit providers, such as Cherriots Regional (SAMTD), Tillamook County Transit, Yamhill County Transit, South Metro Area Regional Transit

(City of Wilsonville), Cascades POINT (Amtrak), and Flixbus.

## **Environmental and Public Health**

### **23. Describe how this project would go beyond providing an alternative to personal car use to reduce greenhouse gas emissions, reduce pollution, and/or support positive health outcomes. How does this project support applicant's climate planning efforts?**

As more people access public transportation services, the number of vehicles on the roads will decrease and thereby decrease/reduce greenhouse gas emissions and pollution. In many locations throughout the SAMTD transit network, the walking distance to/from the nearest bus stop is more than a half mile, which is prohibitive for many individuals resulting in an increase in personal car use (single occupancy vehicle trips). Reducing walking distance and improving access in neighborhoods will increase ridership of vulnerable populations and the general public. The project also promotes positive health outcomes by providing individuals with accessible, low-cost transportation. Seniors, individuals with disabilities, individuals living below 200% of the Federal Poverty Level, refugees, veterans, other traditionally marginalized or disadvantaged groups, as well as general populations, will have better access to jobs, education, healthcare appointments, food and non-food shopping, and recreational opportunities that they may not have been able to access without public transportation.

## **Safety, Security, and Community Livability**

### **24. Describe how the project would increase use and participation in active transportation, and support connections between transit and other travel modes like biking and walking.**

Public transit is an active mode of transportation by definition due to the fact that people access the bus by either walking or biking to the bus stop. By making transit easier to use, this project will increase ridership, and therefore increase participation in active transportation by the communities served. The project will add more coverage and more frequency for current routes. Cherriots has seen clear evidence in all areas of its service area in Salem and Keizer, but also in its regional system that whenever more frequency is added to a bus route, more people begin to use it.

With smaller buses, SAMTD would be able to explore traveling down streets into neighborhoods that we cannot at this time, due to vehicle size constraints. This would provide better access for people who currently have a long walk to reach transit service. With better coverage of the Cherriots service area, transit becomes a viable option for more people. The project encourages transit use and, therefore, walking and biking by reducing the currently prohibitive distances to/from bus stops and lowering the barriers to accessing public transportation for people with limited mobility or other health concerns as well as improving safety during inclement weather.

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

The smaller buses this project would fund are safer to operate on smaller, neighborhood streets; they would increase safety for passengers and for other roadway users.

With the smaller buses being able to go deeper into neighborhoods, passengers would be less likely to have to use busier streets to access public transportation.

Smaller vehicles are safer to use on smaller neighborhood streets in relation to navigating large buses compared to smaller buses in neighborhoods. Passengers are less likely to have to ride bikes on busy streets that may not have bike lanes and be less likely to have to walk on or cross busier streets if the vehicles are coming through their neighborhood.

## **Statewide Transit Network Connections**

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

**improvements.**

This project would enable SAMTD to provide higher frequency connections to the Cherriots Regional bus network as well as other regional providers, therefore improving the utility of the statewide transit network. Currently, Cherriots Regional serves 17 other communities in Marion and Polk counties outside of Salem and Keizer. Additionally, three other regional transit providers serve stops at two SAMTD transit centers in Salem - Yamhill County Transit, Tillamook County Transit, and South Metro Area Regional Transit. Improving access to local transit by taking it into the neighborhoods where people live will improve their access to these regional connections and beyond.

## **Funding and Strategic Investment**

**27. Describe why investment in this project makes sense from both the perspective of current need and long term Oregon transit needs.**

During public outreach performed in 2022, Cherriots staff heard from hundreds of people that the transit service needs to be more frequent and accessible in order for it to be a viable option for them. Investment in this project would improve both the current and long-term needs of Cherriots, but also the Statewide Transit Network. This project investment will allow SAMTD to not run 35' to 40' buses on small neighborhood streets with small passenger loads. Additionally, this would let us reach farther into neighborhoods where larger vehicles can not provide service. It also opens up the opportunity to explore micro transit pilots in the SAMTD service area, which will provide more access to transit in the community. Additionally, this project would also make adding frequency or routes to the Cherriots system feasible. During peak pullout, SAMTD is at capacity with all buses currently deployed, which does not allow for expanding service. If not awarded the funds to add to our fleet, Cherriots may not be able to meet the needs of the community by operating deeper into the service area. Providing more transit and reduced distances to/from bus stops for all of the community as well as vulnerable populations helps meet Oregon's transit needs by taking transit to where people live.

**28. If this project will last beyond the 2023-25 biennium, describe the plan for ongoing funding including match. If not applicable, type N/A.**

N/A

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

N/A

## **30. Capital Asset Purchases**

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

The proposed capital purchases are four low-floor cutaway buses. The buses will all be Ford Transit T250 with 10 ambulatory seats, two wheelchair positions, and eight to nine seats with ADA deployed.

## **Project Details**

**Task Category**

Vehicle Purchase

### **Vehicle Purchase**

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

Vehicle Expansion

### **Vehicle Expansion**

Will you use the Oregon state price agreement contract?

Yes

Will this grant award support purchase of a used vehicle?

No

## Vehicles to be purchased

Vehicle ALI	Make/Model	Quantity	Cost Each	Total	# of seats / # ADA stations	# of seats with ADA deployed	Fuel System	Est. Order Date	Est. Delivery Date
11.12.04 Bus < 30 FT	Ford Transit T250	4	\$267,630.00	\$1,070,520.00	10/2	8	Gas (G)	7/3/2023	7/3/2025

**Total:**  
4

**Grand Total:**  
**\$1,070,520.00**

**Total Project Cost (Grant Amount + Match Amount)**

\$1,070,520.00

## Project Task and Match Amounts

### 20% Match Rate Calculations

**Grant Amount - STIF Discretionary/STIF Intercommunity/5311f (80% State/Fed Share)**  
\$856,416.00

**Match Amount - STIF Discretionary/STIF Intercommunity/5311f (20% Local Share)**  
\$214,104.00

## Application Totals

### Match Sources

Match Sources	Amount
Local	\$214,104.00

Are matching funds of at least 20% of project costs available if the project is awarded?

Yes

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

0%

Percent of funds used for fixed route transportation

100%

**Note on Application Totals:** If applying for 5311(f) Operating, a 50% match rate is applied to identified

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

### **Application Totals Summary By Task - 20% Match Rate**

<b>Task Category</b>	<b>Task Project Cost</b>	<b>Task Grant Amount</b>	<b>Task Match Amount</b>
Vehicle Expansion	\$1,070,520.00	\$856,416.00	\$214,104.00
Vehicle Replacement	\$0.00	\$0.00	\$0.00
Equipment Purchase	\$0.00	\$0.00	\$0.00
Facility Purchase	\$0.00	\$0.00	\$0.00
Signs/Shelters	\$0.00	\$0.00	\$0.00
Planning	\$0.00	\$0.00	\$0.00
Project Administration	\$0.00	\$0.00	\$0.00
Operating	\$0.00	\$0.00	\$0.00
Preventive Maintenance	\$0.00	\$0.00	\$0.00
Mobility Management	\$0.00	\$0.00	\$0.00
	<b>Total Project Cost: \$1,070,520.00</b>	<b>Total Grant Amount: \$856,416.00</b>	<b>Total Match Amount: \$214,104.00</b>



**To:** Board of Directors

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

**Thru:** Allan Pollock, General Manager

**Date:** January 26, 2023

**Subject:** Adopt Resolution No. 2023-02 to approve Apportionments from Federal Transit Administration (FTA) 5310 American Rescue Plan Act (ARPA) and Federal Transit Administration (FTA) 5310 Enhanced Mobility of Seniors and Individuals with Disabilities for Salem Area Mass Transit District

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## ISSUE

Shall the Board adopt Resolution No. 2023-02 (**Attachment A**) to approve Apportionments from FTA 5310 American Rescue Plan Act (ARPA) and FTA 5310 Enhanced Mobility of Seniors and Individuals with Disabilities for Salem Area Mass Transit District?

## BACKGROUND AND FINDINGS

Salem Area Mass Transit District (SAMTD) is the Qualified Entity designated by Oregon State Statute to receive recommendations from the Statewide Transportation Improvement Fund Advisory Committee (STIFAC) for funding grant projects located in Marion and Polk Counties in accordance with Salem Area Mass Transit District's (SAMTD) Coordinated Public Transit Human Services Transportation Plan. These 5310 funds support transportation for seniors and people with disabilities in Marion and Polk Counties.

A summary of the project requesting funding is shown below in **Table 1**.

**TABLE: 1 – Project Requests**

<b>Applicant</b>	<b>5310 Project Description</b>	<b>Project Total Request</b>	<b>Local Match</b>	<b>Grant Amount</b>
SAMTD	Section 5310 ARPA Funds for expenses incurred due to the COVID-19 Pandemic	\$42,465	\$0.00	\$42,465
SAMTD	Section 5310 Enhanced Mobility of Seniors and Individuals with Disabilities	\$364,199	\$0.00	\$364,199

Using the funds for these projects listed in the grant applications (**Attachment B**), will grow and improve public transit services in the Salem-Keizer urbanized areas and allow SAMTD to continue meeting the special transportation needs of seniors and individuals with disabilities.

**FINANCIAL IMPACT**

There is no fiscal impact in the current budget. If approved for funding, the amounts will be included in the appropriate budget year for the projects. These funds do not require any local match.

**RECOMMENDATION**

The Statewide Transportation Improvement Fund Advisory Committee recommends the Board adopt Resolution No. 2023-02 to approve a FTA American Rescue Plan Act (ARPA) 5310 Apportionment and a FTA 5310 Apportionment for Salem Area Mass Transit District.

**PROPOSED MOTION**

**I move that the Board adopt Resolution No. 2023-02 to approve Apportionments from FTA 5310 American Rescue Plan Act (ARPA) and a FTA 5310 Enhanced Mobility of Seniors and Individuals with Disabilities for Salem Area Mass Transit District.**





**Resolution No. 2023-02**

**APPROVE APPORTIONMENTS FROM THE FTA 5310 AMERICAN RESCUE PLAN ACT (ARPA) AND THE FTA 5310 ENHANCED MOBILITY OF SENIORS AND INDIVIDUALS WITH DISABILITIES.**

**WHEREAS**, the Salem Area Mass Transit District, hereafter referred to as "District," is designated as the Qualified Entity (QE) in the Statewide Transportation Improvement Fund (STIF) Program for Marion and Polk Counties under ORS 184.751, ORS 391.800, OAR 732-040-0005 (5)(c) and (26), and OAR 732-005-0010 (29); and,

**WHEREAS**, the District is required to conduct a review of projects submitted for funding from the FTA Section 5310 eligible entities within the QE Area of Responsibility; and,

**WHEREAS**, as a result of the review will take action identifying which projects to recommend for funding; and,

**WHEREAS**, Table 1 attached to this resolution contains the projects, costs, and proposed funding from FTA ARPA 5310 program and 5310 Enhanced Mobility of Seniors and Individuals with Disabilities Apportionment;

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

**THAT**, the Board adopt Resolution No. 2023-02 to approve the project and funding amount identified by the STIFAC in Table 1 attached to this resolution; and direct the General Manager to authorize the submission of applications for the 5310 funds to the FTA.

**ADOPTED** by the Board of Directors on the 26th day of January, 2023, and effective thereupon.

**ATTEST:**

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

\_\_\_\_\_  
Recording Secretary

**TABLE: 1 – Project Requests**

<b>Applicant</b>	<b>5310 Project Description</b>	<b>Project Total Request</b>	<b>Local Match</b>	<b>Grant Amount</b>
SAMTD	Section 5310 ARPA Funds for expenses incurred due to the COVID-19 Pandemic	\$42,465	\$0.00	\$42,465
SAMTD	Section 5310 Enhanced Mobility of Seniors and Individuals with Disabilities	\$364,199	\$0.00	\$364,199



FY 21 SECTION 5310 ARP ACT GRANT  
*APPLICATION*

*FOR PROJECTS LOCATED WITHIN THE SALEM-KEIZER URBAN GROWTH BOUNDARY*

## INTRODUCTION

1

The Federal Transit Administration (FTA) has available formula funds of \$42,465 in Fiscal Year 2021 American Rescue Plan Act (ARP Act) under the Enhanced Mobility of Older Adults and Individuals with Disabilities program. The ARP Act 5310 funds are to be used for expenses incurred responding to the COVID-19 pandemic. The ARP Act 5310 grant funds do not require any match.

- *Contact Salem Area Mass Transit District with questions around completing the application.*
- *Each project submitted for funding consideration must have its own application.*
- *This form must be filled out using the Adobe .pdf form. Paper applications will NOT be accepted.*
- *Unless documents are signed with an official electronic signature service, signature pages should be scanned and attached as separate pages to each application.*

### Submittal Checklist

#### ***Make sure***

- ✓ Application is complete, signed, and dated

#### ***Submit***

- ✓ Proof of agency status (template included in application packet)
- ✓ Documentation of expenses related to responding to the COVID-19 pandemic

### A. ORGANIZATION INFORMATION

**Name of Organization:** Salem Area Mass Transit District

**Contact Person:** Peggy Greene

**Address:** 555 Court Street NE Suite 5230, Salem, OR

**Telephone:** (503) 361-7530

**Email:** peggy.greene@cherriots.org

**Type of organization (check one)**

Private non-profit	<input type="checkbox"/>
State, county, tribal, or local government agency	<input checked="" type="checkbox"/>

**Area of service (check one)**

Inside the Salem-Keizer Urban Growth Boundary (UGB)	<input checked="" type="checkbox"/>
Outside the Salem-Keizer UGB	<input type="checkbox"/>
Both inside and outside the Salem-Keizer UGB	<input type="checkbox"/>

**Organization days and hours of operation**

Day	Hours
Sunday	0700-2100
Monday	0500-2330
Tuesday	0500-2330
Wednesday	0500-2330
Thursday	0500-2330
Friday	0500-2330
Saturday	0500-2200
Please list any planned periods of service closure greater than 3 days (i.e., closed the week between Christmas Day and New Year's Day)	

FY 22 (actual)	FY23 (projected)
\$ 10,409,894	\$ 12,370,796

**B. PROJECT INFORMATION**

**Project title** (will be used for reviewer reference and in public comment process. Example: *Mobility Management for XYZ volunteer driver program*)

Cherriots COVID-19 Relief and Response

**Project service area to be served** (indicate the geographic features that define your service area such as streets, rivers, or jurisdictional boundaries)

North boundary	
West boundary	
South boundary	
East boundary	
Other general geographic area (i.e., within the Salem-Keizer UGB)	Within the Salem-Keizer UGB

*Optional:* please provide a map of your service area as a separate single page 8.5"x11" attachment.

Total FTA Section 5310 ARP Act funds requested

\$ 42,465
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**Start date**

7/1/2022
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**Funding request type (check one)**

Continuation of existing service at same level of service	<input checked="" type="checkbox"/>
Additional Cleaning / Sanitizing	<input type="checkbox"/>
Costs Incurred to Support Teleworking Requirements	<input type="checkbox"/>
Capital request	<input type="checkbox"/>
Other:	<input type="checkbox"/>

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**Scalable Section 5310(FTA) Grant Request**

*You are strongly encouraged to request the full amount of funding that is needed for each project, including funding for new projects; however, funding is limited. Describe the scalability of your 5310(FTA) ARP Act funding request, how you scaled down your request and what aspects of the program would not be funded under this funding scenario below. Then enter your scaled down request amounts.*

**Scalability Description:**

Cherriots requests the full amount to support ongoing operations in this unprecedented time of the COVID-19 pandemic. Cherriots does not have general funds available to cover the expenses related to COVID-19. Without the full request, operations could result in service cuts in order to continue providing safe, reliable transportation services.

**FY23**

Scaled request: \$ 42,465.00

**Coordinated Plan**

Is project related to services found in the Cherriots *Coordinated Public Transit - Human Services Transportation Plan* dated September 2019?

Yes  No If yes, what page?

38

If no, explain why the project is not part of the Coordinated Plan.

*For example: Is the project part of another plan (please name)? Is the plan still being finalized?*

## 1. Project description

### a.) Describe services or capital investment to be provided by Section 5310(FTA) ARP Act funding. Include a description of the following:

- *What level of service was sustained for customers?*
- *What capital expenditures were made to respond to the COVID-19 pandemic?*
- *What additional services/ activities were added to respond to the COVID19 pandemic?  
(cleaning, sanitizing, screening of employees, etc.)*
- *Other COVID-19 related expenses (500 word limit).*

The project will fund the COVID-19 relief and response needed to sustain Cherriots Shop and Ride service. Shop and Ride provides Shopper Shuttle and Dial-a-Ride (demand responsive) transportation services to seniors age 60 and older and individuals with disabilities within the Urban Growth Boundaries (UGB) of Salem and Keizer. Scheduling is by reservation. Riders call the Cherriots Call Center up to two weeks in advance or within 24 hours of their requested trip to make reservations. No application is required to qualify for services and all Shop and Ride vehicles are ADA-accessible. Cherriots Shop and Ride provided approximately 4,356 unlinked passenger trips in fiscal year 2022. Currently, the Shopper Shuttle is suspended due to the limited capacity on vehicles for social distancing although SAMTD anticipates resuming the service when safe to do so. Dial-a-Ride continues to provide trips for shopping, medical, and other daily living activities.

The bus service operates 8AM-5PM Monday through Friday. The call center is open 7 days a week, taking reservations for the program.

The COVID-19 relief and response will ensure operations continue by providing funds for operational and payroll expenses and sanitization of public spaces and buses. This support is especially important for the vulnerable population served by Shop and Ride. The project maintains employment without furloughs, a commitment Cherriots has made since the beginning of the pandemic, ensuring employees are ready to serve and supporting continuity of service. Many changes were implemented to respond to the pandemic such as limited seating on vehicles to ensure social distancing.

It is more important than ever for seniors and individuals with disabilities to have access to safe, reliable transportation options designed for their needs and access to healthcare as well as to continue daily activities. The project also ensures the safety of customers and employees by providing high levels of sanitization to remove or reduce exposure to COVID-19. Vehicles are sanitized after each run and deep cleaned 1-2 times per week. Other COVID-19 expenses include signage to inform customers of safety protocols, personal protective equipment, and advanced air purification systems to continuously sanitize the air in buses and many high-traffic indoor areas.



**b.) Will you coordinate between providers to avoid duplication?** *Describe what level of coordination between partners is done and how duplication is avoided, limit 200 words*

Cherriots Shop and Ride service is operated by a contractor. Cherriots coordinates with this contracted services vendor to provide expectations concerning cleaning and sanitizing. Cherriots either provides the cleaning service or the contractor replicates Cherriots' cleaning protocols to maintain consistency and safety. Because the contractor agrees to perform this cleaning, Cherriots does not duplicate or need to provide additional cleaning to the vehicles.

The Cherriots Call Center provides coordination of transportation services, which effectively uses available resources and avoids duplication. Call Center Customer Care Representatives schedule trips for riders both inside and outside of the Salem-Keizer UGB on Cherriots LIFT, Shop and Ride, and the Route 45 in Polk County as well as refers callers to other providers and available public transportation outside of the Cherriots district (e.g., SMART out of Wilsonville, Tillamook County Transit transportation services from Salem to the Oregon Coast, Amtrak, and Greyhound). The call center staff are able to refer callers to a variety of appropriate and available transportation services to fit the needs of riders. This ensures coordination of services and avoids duplication.

**c.) Is your project cost-effective?**

*Describe, limit 200 words*

Yes, the project is cost-effective because the project will ensure current transportation services continue and will provide sanitization of Cherriots' vehicles and customer service areas without duplication. The project also supports the no furlough commitment of Cherriots and the contractor's employees.

Cherriots Shop and Ride vehicles are owned by Cherriots and a contracted service provider operates the vehicles. Cherriots installs the air purification systems in the vehicles and maintains them by the in-house Cherriots Maintenance Shop at no cost to this project. This supports cost effectiveness and a high level of sanitizing.

**d.) Project quality**

*Describe the **need** for this project. How was this need determined or assessed? Max 2,500 characters/approx. limit: 400 words*

The need for the project was determined by per the Governor's 2020 orders and CDC guidelines to restrict the spread of COVID-19 while also maintaining employment levels (Federal COVID-19 funding guidance) and transportation services (Coordinated Plan).

Cherriots Shop and Ride transportation service is an integral component of the complete transit network that specifically provides increased transportation options for seniors and individuals experiencing disabilities. This population often has limited transportation options that fit their needs and COVID-19 reduced options even further. The need for Shop and Ride is identified in the SAMTD Coordinated Plan (2019) and by Stakeholder Sessions (2018).

The need is also identified by the Federal ARP Act, which designates funds, "to be directed to payroll and operations of public transit (including payroll and expenses of private providers of public transportation), unless the recipient certifies to FTA that the recipient has not furloughed any employees."

The Centers for Disease Control and Prevention (CDC) identified methods for protecting staff and passengers because of the close contact with passengers, co-workers, and the public. Cherriots implemented CDC protocols such as cleaning and disinfecting frequently touched surfaces, reducing contact in fare collection, social distancing and limiting seats, and signage to communicate safety protocols.

Providing safe, reliable transportation service for seniors and individuals with disabilities ultimately offer independence that may or may not be otherwise an option for them without the Shop and Ride service.

**e.) Expected outcomes**

*Describe the expected outcomes of this project on seniors and people with disabilities. Why is this project the best method to address the previously described need? Max 2,500 characters/approx. limit: 400 words*

The project will result in continued ridership with communication of the safety measures provided to seniors and individuals with disabilities.

This project is the best method to address the need to restrict the spread of COVID-19 while maintaining transportation services because of the high standards of cleaning and sanitizing. Cheriots staff are guided in this by the CDC and OSHA for the protection of passengers and employees.

Shop and Ride outcomes will be measured by annual ridership of seniors and individuals with disabilities.

**Provide the timeline of the project in the following table**

	<b>Step Description</b>	<b>Completion Date</b>
<b>1</b>	Project/service begins	7/1/2022
<b>2</b>	Project/service ends	6/30/2022
<b>3</b>		
<b>4</b>		
<b>5</b>		
<b>6</b>		

**2. Is your application for a replacement vehicle?**

Yes (continue to #3)  No (continue to Section C)

**3. Enter the following information about each vehicle to be replaced if the total cost of the vehicle is being requested:**

<b>Vehicle Category*</b> Choose an item.	<b>Qty (#)</b>	<b>Cost Each (\$)</b>	<b>Total (\$)</b>	<b>No. Seats w/ADA Deployed</b>	<b>No. of ADA Stations</b>	<b>Total Capacity</b>	<b>Fuel Type*</b> Choose an item.	<b>Estimated Order Date</b>	<b>Estimated Delivery Date*</b>
			\$ 0.00				---		
--			\$ 0.00				---		
--			\$ 0.00				---		
--			\$ 0.00				---		
--			\$ 0.00				---		
<b>Totals:</b>	0	<b>Grand Total:</b>	\$ 0.00						

**\*Vehicle Category Descriptions:**

<https://www.oregon.gov/ODOT/RPTD/RPTD%20Document%20Library/Vehicle-Useful-Life-Benchmarks.pdf>

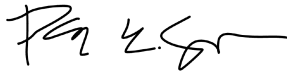
\*Fuel Type Options: (G) Gas, (D) Diesel, (B) Biodiesel, (HG) Hybrid-gas, (HD) Hybrid-diesel, (CNG) Compressed Natural Gas, (OF) Other alternative Fuel.

\***Estimated Delivery Date:** Minimum 160 days if ADA accessible.

### C. ORGANIZATIONAL CERTIFICATION

By submitting this document via email to Cherriots, I certify that the submitted materials and data included are complete, true and correct. Also, I certify that my organization is:

- Eligible to enter into agreements with Cherriots;
- Has the legal, managerial, and operational capacity to do the work to be paid for by the Section 5310;
- Not debarred or suspended from federal grants;
- In compliance with federal, state, and local laws and regulations including, and not limited to, those pertaining to passenger transportation, civil rights, labor, insurance, safety, and health, as applicable;
- Complies with the laws or rules of the Section 5310 Program;
- Properly uses and accounts for the Section 5310 Program's goals; and
- Will operate the project or service in a safe, prudent, and timely manner.



Grants Administrator

12/8/2022

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Signature of Authorized Organization Officer

Title

Date

## Private Nonprofit Agency – Corporation Status Inquiry and Certification

If your agency or organization is claiming eligibility as a Section 5310(FTA) Program applicant based on its status as a private nonprofit organization, you must obtain verification of its incorporation number and current legal standing from the Oregon Secretary of State Information Retrieval/ Certification & Records Unit (IRC Unit). The “Status Inquiry” document must be attached as an appendix to the application. To assist your agency or organization in obtaining this information, use one of these two methods:

To obtain Corporate Records Information over the Internet, go to:  
<http://sos.oregon.gov/business/Pages/find.aspx> Enter the name of your agency or organization. If its status is active, print the page and submit it as proof.

### Private Non-profits

Legal Name of Non-profit Applicant: \_\_\_\_\_

State of Oregon Articles of Incorporation Number: \_\_\_\_\_

Date of Incorporation: \_\_\_\_\_

### Certifying Representative

Name (print):	
Title (print):	
Signature:	Date



# **2022** SECTION 5310 (FTA) GRANT *APPLICATION*

*FOR PROJECTS LOCATED WITHIN THE SALEM-KEIZER URBAN GROWTH BOUNDARY*

*JULY 2022*



## INTRODUCTION

- Read the *2022 Section 5310(FTA) Grant Application Instructions* prior to completing this application.
- Each project submitted for funding consideration must have its own application.
- Selection criteria are detailed in the *Application Instructions*.
- This form must be filled out using the Adobe .pdf form. Paper applications will NOT be accepted.
- Unless documents are signed with an official electronic signature service, signature pages should be scanned and attached as separate pages to each application.

### Submittal Checklist

#### ***Make sure***

- ✓ Application is complete, signed, and dated

#### ***Submit***

- ✓ Proof of agency status (template included in application packet)
- ✓ Maintenance Plan (if submitting an application for preventive maintenance)

### A. ORGANIZATION INFORMATION

**Name of Organization:** Salem Area Mass Transit District

**Contact Person:** Peggy Greene

**Address:** 555 Court Street NE Suite 5230, Salem, OR

**Telephone:** (503) 361-7530

**Email:** peggy.greene@cherriots.org

**Type of organization (check one)**

Private non-profit	<input type="checkbox"/>
State, county, tribal, or local government agency	<input checked="" type="checkbox"/>

**Area of service (check one)**

Inside the Salem-Keizer Urban Growth Boundary (UGB)	<input checked="" type="checkbox"/>
Outside the Salem-Keizer UGB	<input type="checkbox"/>
Both inside and outside the Salem-Keizer UGB	<input type="checkbox"/>

**Organization days and hours of operation**

Day	Hours
Sunday	8:00 AM - 4:00 PM
Monday	6:00 AM - 6:00 PM
Tuesday	6:00 AM - 6:00 PM
Wednesday	6:00 AM - 6:00 PM
Thursday	6:00 AM - 6:00 PM
Friday	6:00 AM - 6:00 PM
Saturday	8:00 AM - 4:00 PM
Please list any planned periods of service closure greater than 3 days (i.e., closed the week between Christmas Day and New Year's Day)	

**Total transportation program costs by year**

FY21 (historical data, if applicable)	FY22 (actual)	FY23 (projected)
\$ 8,140,566.00	\$ 10,409,894.00	\$ 12,370,796.00

**B. PROJECT INFORMATION**

**Project title** (will be used for reviewer reference and in public comment process. Example: Mobility Management for XYZ volunteer driver program)

Cherriots Mobility Management Call Center

**Project service area to be served** (indicate the geographic features that define your service area such as streets, rivers, or jurisdictional boundaries)

North boundary	
West boundary	
South boundary	
East boundary	
Other general geographic area (i.e., within the Salem-Keizer UGB)	Within the Salem-Keizer UGB

*Optional:* please provide a map of your service area as a separate single page 8.5"x11" attachment.

**Total Section 5310(FTA) funds requested**

\$ 202,199.00
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**Start date**

7/1/22
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**Funding request type (check one)**

Continuation of existing service at same level of service	<input checked="" type="checkbox"/>
Expansion of existing service	<input type="checkbox"/>
New service	<input type="checkbox"/>
Capital request	<input type="checkbox"/>
Other:	<input type="checkbox"/>

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**Scalable Section 5310(FTA) Grant Request**

*You are strongly encouraged to request the full amount of funding that is needed for each project, including funding for new projects; however, funding is limited. Describe the scalability of your 5310(FTA) funding request, how you scaled down your request and what aspects of the program would not be funded under this funding scenario below. Then enter your scaled down request amounts.*

**Scalability Description:**

Cherriots requests the full amount only for the Call Center project as general funds are not available and have not been budgeted to support this project and without full funding from the grant, it would be difficult to provide services.

**FY23**

Scaled request: \$ 202,199.00

**Identify the project's additional sources of funding in the table below**

<b>Estimated Additional Project Resources</b>	
<b>Source of Funds</b>	<b>Dollar Amount</b>
2021 Section 5310(FTA) Grant Request ( <i>Important!</i> )	\$ 202,199.00
Local Resources	\$
Federal Resources	\$
Other (provide description): ODOT STIF Formula	\$ 50,550.00
<b>Project Grand Total</b>	<b>\$ 252,749.00</b>

**Coordinated Plan**

Is project derived from the Cherriots *Coordinated Public Transit – Human Services Transportation Plan* dated September 2019?  Yes  No If yes, what page?

38

If no, explain why the project is not part of the Coordinated Plan.

*For example: Is the project part of another plan (please name)? Is the plan still being finalized?*

## 1. Project description

### a.) Describe services or capital investment to be provided by Section 5310(FTA) funding. Include a description of the following:

- Who you will serve? What geographic area you will serve?
- What level of service will be provided to customers?
- Operational activities; how will customers request and receive rides, including scheduling and dispatching?
- Describe if volunteers will be utilized to provide service and how this will occur (will the volunteer program be supported with 5310(FTA) or other funds? Will you provide mileage reimbursement to volunteers using their own vehicles?).
- **How will the service be marketed?** (500 word limit)

This project will fund a portion of the Cherriots Mobility Management Call Center costs that directly benefit seniors and individuals with disabilities in Marion and Polk counties. The project serves residents within the Salem-Keizer Urban Growth Boundary (UGB) utilizing the Cherriots LIFT and Cherriots Shop and Ride transportation services. Efforts have been developed and implemented to ensure that public transportation services in Marion and Polk counties are not duplicated, including services identified in the current adopted Coordinated Public Transit - Human Services Transportation Plan.

The Cherriots Call Center schedules trips for riders on Cherriots LIFT, Cherriots Shop and Ride as well as for deviations on the Cherriots Regional Route 45 in Polk County (NOTE: The PCF has been replaced with the Route 45 fixed route with deviations). Customer Care Representatives answer caller's questions on transportation services that are available regionally in addition to scheduling trips for seniors and individuals with disabilities. Customer Care Representatives also schedule trips for individuals that are traveling to and from their worksites through a collaboration with Marion County. This collaboration is called DD53 and is included in the Cherriots LIFT calls as LIFT is the transportation service that is utilized to provide the trips.

Currently, there are six (6) employees in the call center: 1 Scheduler; 1 Team Lead, 3 Customer Care Representatives, and the General Manager. Cherriots Call Center hours are Monday-Friday 6 AM-6 PM and Saturday/Sunday 8 AM-4 PM. Volunteers are not utilized for this service. The call center service is marketed via social media, cherriots.org, the Cherriots LIFT Eligibility Office, publicly posted and shared informational materials, mobility management outreach presentations, and project staff participation in community meetings throughout the region. January-December 2021 the call center answered 37,055 total calls: LIFT calls - 30,291; Regional calls - 633 (PCF); and Shop and Ride - 3,279.

Performance measures have been created for the partnership and call center project. The Cherriots Call Center manager evaluates performance measures on a quarterly and annual basis. Performance measures are adjusted for quality and cost effectiveness. The Cherriots Call Center meets and exceeds the Federal Transit Administration - FTA/ADA Guidance for Call Center Telephone Hold Times. Speed of answer under 30 seconds; Calls abandoned 0%; Call handling time under 5 minutes.

**b.) Will you coordinate between providers to avoid duplication?** *Describe what level of coordination between partners is done and how duplication is avoided, limit 200 words*

The phrase mobility management is by definition inclusive of regional partners. One of the goals of the project is assistance in coordinating projects where duplication is avoided. Avoidance of duplication is done primarily by the Cherriots Call Center when trips are scheduled for riders both inside and outside of the Salem-Keizer UGB on Cherriots LIFT, Shop and Ride and the Route 45 in Polk County. The Cherriots Call Center also coordinates services throughout the region by referring callers to other providers and public transportation outside of the Cherriots transportation services that are available (e.g., SMART out of Wilsonville, Tillamook County Transit transportation services from Salem to the Oregon Coast, Amtrak, and Greyhound). Presentation opportunities offer attendees information on the Cherriots Call Center being a resource for both scheduling trips on Cherriots Public Transportation services as well as answering general questions on transportation services available regionally.

**c.) Is your project cost-effective?**

*Describe average cost per ride, cost per mile and cost per hour, limit 200 words*

The Cherriots Call Center is a central clearinghouse for public transportation services within Marion and Polk counties by scheduling requested trips on Cherriots LIFT, Shop and Ride, and Regional Route 45 deviations. The ability to schedule requested trips at one centralized location allows for easy coordination of services between providers, eliminates duplication of services and ultimately provides a cost savings. January-December 2021 the call center answered 37,055 total calls: LIFT calls - 30,291; Regional calls - 633 (PCF); and Shop and Ride - 3,279.

The average cost per ride could be calculated based on the number of rides provided and total project costs (e.g., PM, purchase of service, call center, and staff time managing the project). A portion of the call center volume is allocated to the project based on the number of calls received for project information or trip requests. These costs can increase or decrease the average cost per ride. The Shop & Ride service alone provide 4,356 UPT in 2022 at approximately \$68 per ride and given the significant service provided for the community.

**d.) Project quality**

*Describe the **need** for this project. How was this need determined or assessed? Max 2,500 characters/approx. limit: 400 words*

The Cherriots Call Center is one-stop clearinghouse for riders to call for local and regional transportation services including: Scheduling, inquiring about options, and requesting rides on Cherriots transportation services. The Cherriots Call Center is essential for providing resources to individuals who may have little information about public transportation in Marion and Polk counties that is available. Without the call center to provide the information and schedule trips, accessing public transportation would be very difficult.

The need for this project was determined based on a summary of stakeholder workshops held in 2016 (Coordinated Plan Appendix A). The plan identified needs for improved infrastructure, coordination, and communication, all of which the call center supports. Stakeholder comments included simplifying to a single call and "Talking with a human who you can understand..."

Cherriots Shop and Ride provides a vital unmet need by providing essential public transportation specifically for individuals with disabilities and seniors 60 and older who may or may not be eligible for ADA paratransit and/or may or may not be able to access fixed route transportation services. The services are designed to address the needs of this population with ADA-accessible transportation and offering services without a qualifying application. Shop and Ride lowers barriers to accessing transportation by offering low fees for service and without an application or assessment to qualify riders. The call center is essential to providing the Shop and Ride service.

**e.) Expected outcomes**

*Describe the expected outcomes of this project on seniors and people with disabilities. Why is this project the best method to address the previously described need? Max 2,500 characters/approx. limit: 400 words*

FY2023 the call center project will continue to focus on two goals:

1. Goal: Focus on the Customer

Objective: Provide customer centered efficient transportation

Outcomes: a) opportunities for social and recreational trips; b) dependability of service; c) decreased wait time; d) cost effective service

How Measured: a) evaluate the Shopper Shuttle locations and ridership to the locations, as well as ridership by day of the week; b) increase ridership on the Shopper Shuttle within the budget; c) review customer requests for shopping locations; d) reduce revenue miles through efficiency.

2. Focus on World Class Customer Experience

Objective: Provide World Class Customer Experience

Outcomes: a) communicate information to customers and potential customers; b) conduct customer feedback/surveys.

How Measured: a) number of calls to the call center; b) customer feedback, public contacts, or surveys; c) call center staff completing training on "A Better Cherriots - Delivering World Class Customer Experience" on every interaction; d) training on all enhanced public transportation service changes (Sunday/Holidays) provided by Cherriots Services.

Mobility management is the most effective way to facilitate communication and coordination with customers and partners. Mobility management also builds partnerships between providers by bringing all providers together in the coordination process.



**Provide the timeline of the project in the following table**

	<b>Step Description</b>	<b>Completion Date</b>
<b>1</b>	Start Service	7/1/22
<b>2</b>	End Service	6/30/23
<b>3</b>		
<b>4</b>		
<b>5</b>		
<b>6</b>		

**2. Is your application for a replacement vehicle?**

Yes (continue to #3)  No (continue to Section C)

**3. Enter the following information about each vehicle to be replaced if the total cost of the vehicle is being requested:**

<b>Vehicle Category*</b> Choose an item.	<b>Qty (#)</b>	<b>Cost Each (\$)</b>	<b>Total (\$)</b>	<b>No. Seats w/ADA Deployed</b>	<b>No. of ADA Stations</b>	<b>Total Capacity</b>	<b>Fuel Type*</b> Choose an item.	<b>Estimated Order Date</b>	<b>Estimated Delivery Date*</b>
E 7			\$ 0.00				---		
--			\$ 0.00				---		
--			\$ 0.00				---		
--			\$ 0.00				---		
--			\$ 0.00				---		
<b>Totals:</b>	0	<b>Grand Total:</b>	\$ 0.00						

**\*Vehicle Category Descriptions:**

<https://www.oregon.gov/ODOT/RPTD/RPTD%20Document%20Library/Vehicle-Useful-Life-Benchmarks.pdf>

\*Fuel Type Options: (G) Gas, (D) Diesel, (B) Biodiesel, (HG) Hybrid-gas, (HD) Hybrid-diesel, (CNG) Compressed Natural Gas, (OF) Other alternative Fuel.

\***Estimated Delivery Date:** Minimum 160 days if ADA accessible.

**C. ORGANIZATIONAL CERTIFICATION**

By submitting this document via email to Cherriots, I certify that the submitted materials and data included are complete, true and correct. Also, I certify that my organization is:

- Eligible to enter into agreements with Cherriots;
- Has the legal, managerial, and operational capacity to do the work to be paid for by the Section 5310;
- Not debarred or suspended from federal grants;
- In compliance with federal, state, and local laws and regulations including, and not limited to, those pertaining to passenger transportation, civil rights, labor, insurance, safety, and health, as applicable;
- Complies with the laws or rules of the Section 5310 Program;
- Properly uses and accounts for the Section 5310 Program’s goals; and
- Will operate the project or service in a safe, prudent, and timely manner.



Grants Administrator

12/8/2022

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Signature of Authorized Organization Officer

Title

Date

**Private Nonprofit Agency – Corporation Status Inquiry and Certification**

If your agency or organization is claiming eligibility as a Section 5310(FTA) Program applicant based on its status as a private nonprofit organization, you must obtain verification of its incorporation number and current legal standing from the Oregon Secretary of State Information Retrieval/ Certification & Records Unit (IRC Unit). The “Status Inquiry” document must be attached as an appendix to the application. To assist your agency or organization in obtaining this information, use one of these two methods:

To obtain Corporate Records Information over the Internet, go to:  
<http://sos.oregon.gov/business/Pages/find.aspx> Enter the name of your agency or organization. If its status is active, print the page and submit it as proof.

**Private Non-profits**

Legal Name of Non-profit Applicant: \_\_\_\_\_

State of Oregon Articles of Incorporation Number: \_\_\_\_\_

Date of Incorporation: \_\_\_\_\_

**Certifying Representative**

Name (print):	
Title (print):	
Signature:	Date



# **2022** SECTION 5310 (FTA) GRANT *APPLICATION*

*FOR PROJECTS LOCATED WITHIN THE SALEM-KEIZER URBAN GROWTH BOUNDARY*

*JULY 2022*

## INTRODUCTION

- Read the *2022 Section 5310(FTA) Grant Application Instructions* prior to completing this application.
- Each project submitted for funding consideration must have its own application.
- Selection criteria are detailed in the *Application Instructions*.
- This form must be filled out using the Adobe .pdf form. Paper applications will NOT be accepted.
- Unless documents are signed with an official electronic signature service, signature pages should be scanned and attached as separate pages to each application.

### Submittal Checklist

#### ***Make sure***

- ✓ Application is complete, signed, and dated

#### ***Submit***

- ✓ Proof of agency status (template included in application packet)
- ✓ Maintenance Plan (if submitting an application for preventive maintenance)

### A. ORGANIZATION INFORMATION

**Name of Organization:** Salem Area Mass Transit District

**Contact Person:** Peggy Greene

**Address:** 555 Court Street NE Suite 5230, Salem, OR

**Telephone:** (503) 361-7530

**Email:** peggy.greene@cherriots.org

**Type of organization (check one)**

Private non-profit	<input type="checkbox"/>
State, county, tribal, or local government agency	<input checked="" type="checkbox"/>

**Area of service (check one)**

Inside the Salem-Keizer Urban Growth Boundary (UGB)	<input checked="" type="checkbox"/>
Outside the Salem-Keizer UGB	<input type="checkbox"/>
Both inside and outside the Salem-Keizer UGB	<input type="checkbox"/>

**Organization days and hours of operation**

Day	Hours
Sunday	
Monday	
Tuesday	
Wednesday	
Thursday	
Friday	
Saturday	
Please list any planned periods of service closure greater than 3 days (i.e., closed the week between Christmas Day and New Year's Day)	

**Total transportation program costs by year**

FY21 (historical data, if applicable)	FY22 (actual)	FY23 (projected)
\$ 8,140,566.00	\$ 10,409,894.00	\$ 12,370,796.00

**B. PROJECT INFORMATION**

**Project title** (will be used for reviewer reference and in public comment process. Example: *Mobility Management for XYZ volunteer driver program*)

Cherriots Shop and Ride Preventive Maintenance

**Project service area to be served** (indicate the geographic features that define your service area such as streets, rivers, or jurisdictional boundaries)

North boundary	
West boundary	
South boundary	
East boundary	
Other general geographic area (i.e., within the Salem-Keizer UGB)	Within the Salem-Keizer UGB

*Optional:* please provide a map of your service area as a separate single page 8.5"x11" attachment.

**Total Section 5310(FTA) funds requested**

\$ 12,000.00
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**Start date**

7/1/22
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**Funding request type (check one)**

Continuation of existing service at same level of service	<input checked="" type="checkbox"/>
Expansion of existing service	<input type="checkbox"/>
New service	<input type="checkbox"/>
Capital request	<input type="checkbox"/>
Other:	<input type="checkbox"/>

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**Scalable Section 5310(FTA) Grant Request**

*You are strongly encouraged to request the full amount of funding that is needed for each project, including funding for new projects; however, funding is limited. Describe the scalability of your 5310(FTA) funding request, how you scaled down your request and what aspects of the program would not be funded under this funding scenario below. Then enter your scaled down request amounts.*

**Scalability Description:**

Scalability of this project would be difficult without utilizing general funds, which have not been budgeted to be allocated to this project. Cherriots is requesting the full budget only.

**FY23**

Scaled request: \$ 12,000.00

**Identify the project's additional sources of funding in the table below**

<b>Estimated Additional Project Resources</b>	
<b>Source of Funds</b>	<b>Dollar Amount</b>
2021 Section 5310(FTA) Grant Request ( <i>Important!</i> )	\$ 12,000.00
Local Resources	\$
Federal Resources	\$
Other (provide description): ODOT STIF Formula, population-based	\$ 3,000.00
<b>Project Grand Total</b>	<b>\$ 15,000.00</b>

**Coordinated Plan**

Is project derived from the Cherriots *Coordinated Public Transit – Human Services Transportation Plan* dated September 2019?  Yes  No If yes, what page?

38

If no, explain why the project is not part of the Coordinated Plan.

*For example: Is the project part of another plan (please name)? Is the plan still being finalized?*

## 1. Project description

### a.) Describe services or capital investment to be provided by Section 5310(FTA) funding. Include a description of the following:

- Who you will serve? What geographic area you will serve?
- What level of service will be provided to customers?
- Operational activities; how will customers request and receive rides, including scheduling and dispatching?
- Describe if volunteers will be utilized to provide service and how this will occur (will the volunteer program be supported with 5310(FTA) or other funds? Will you provide mileage reimbursement to volunteers using their own vehicles?).
- **How will the service be marketed?** (500 word limit)

This project will fund the preventive maintenance (PM) for Cherriots Shop & Ride. The Shop & Ride fleet consists of five vehicles, four are in-service and one spare. PM is provided by Cherriots Maintenance staff located at 3170 Del Webb Maintenance facility. Shop and Ride provides Shopper Shuttle and Dial-a-Ride (demand responsive) transportation services to seniors age 60 and older and individuals with disabilities within the Salem-Keizer Urban Growth Boundaries (UGB). Scheduling is by reservation. Riders call the Cherriots Call Center up to 2 weeks in advance or within 24 hours of their requested trip to make reservations. Services are available to any senior age 60 or older and individuals with disabilities; no application is required to qualify for services and all Shop and Ride vehicles are ADA-accessible. The Dial-a-Ride service provides transportation from the rider's home and to any location within the UGB Monday through Friday 8 AM-5 PM for \$3.20 per time the bus is boarded. Medical appointments have priority when making trip reservations on Dial-a-Ride. The Dial-a-Ride service observes the same holiday closures as Cherriots Local fixed routes. Riders can bring one additional passenger or personal care attendant when using Dial-a-Ride or Shopper Shuttle. Although currently Shopper Shuttle service is suspended due to COVID-19 and limited capacity, if service returns, it will provide AM and PM shopping trips to predetermined stores within the Salem-Keizer UGB Tuesday through Friday 8:15 AM-5:15 PM for \$1.25 per time the bus is boarded. This origin-destination service offers a schedule for riders to choose from when reserving a trip. Riders are picked up from their homes and travel to the designated shopping location for that time and day. Stores have been selected with the criteria for one-stop shopping opportunities (groceries, pharmacy, bank, and household supplies). Each AM or PM trip is provided approximately 75 minutes at the store before riders are picked up in the front of the store and returned home. Dial-a-Ride continues to provide trips for shopping, medical, and other daily living activities. Volunteers will not be used for this service. Cherriots Shop and Ride is marketed through social media, the Cherriots website, targeted mailers, advertisements in local newspapers, and in-person promotion of services at informational tables and community presentations. In fiscal year 2022, Shop & Ride provided service with 4,356 UPT (unduplicated passenger trips).

Shop and Ride provides transportation for seniors, individuals with disabilities, low-income populations, and senior housing communities, offering vital access to services and serving as a social outlet to many who may have limited means of transportation and are generally at home alone.

**b.) Will you coordinate between providers to avoid duplication?** *Describe what level of coordination between partners is done and how duplication is avoided, limit 200 words*

The phrase mobility management is by definition inclusive of regional partners. One of the goals of the project is assistance in coordinating projects where duplication is avoided. Avoidance of duplication is done primarily by the Cherriots Call Center when trips are scheduled for riders both inside and outside of the Salem-Keizer UGB on Cherriots LIFT, Shop and Ride and the Route 45 in Polk County. The Cherriots Call Center also coordinates services throughout the region by referring callers to other providers and public transportation outside of the Cherriots transportation services that are available (e.g., SMART out of Wilsonville, Tillamook County Transit transportation services from Salem to the Oregon Coast, Amtrak, and Greyhound). Presentation opportunities offer attendees information on the Cherriots Call Center being a resource for both scheduling trips on Cherriots Public Transportation services as well as answering general questions on transportation services available regionally.

**c.) Is your project cost-effective?**

*Describe average cost per ride, cost per mile and cost per hour, limit 200 words*

Cherriots Shop and Ride buses are owned by Cherriots and preventive maintenance is performed in-house by a full service maintenance department, allowing for cost efficiency and continuity in maintenance repairs and record keeping. The Cherriots Maintenance Shop follows all manufacturer and FTA guidance for preventive maintenance on SAMTD-owned vehicles.

The average cost per ride could be calculated based on the number of rides provided and total project costs (e.g., preventive maintenance, purchase of service, call center, and staff time managing the project). The project is cost-effective considering the number of rides (4,356 UPT) provided in 2022 at approximately \$68 per ride and given the significant service provided for the community.

#### d.) Project quality

*Describe the **need** for this project. How was this need determined or assessed? Max 2,500 characters/approx. limit: 400 words*

Cherriots Shop and Ride transportation service is an integral component of the complete transit network that specifically provides increased transportation options for seniors and individuals experiencing disabilities. Preventive Maintenance (PM) is critical for providing safe, reliable Shop and Ride service.

Cherriots Shop and Ride provides a vital unmet need by providing essential public transportation specifically for individuals with disabilities and seniors 60 and older who may or may not be eligible for ADA paratransit and/or may or may not be able to access fixed route transportation services. The services are designed to address the needs of this population with ADA-accessible transportation and offering services without a qualifying application. Shop and Ride lowers barriers to accessing transportation by offering low fees for service and without an application or assessment to qualify riders.

Riders of Shop and Ride are in need of direct, origin-to-destination trips to locations that have multiple errand opportunities as opposed to accessing fixed route services due to their individual ability. Cherriots Shop and Ride transportation service ensures that seniors 60 and older as well as individuals with disabilities can maintain independence and access their communities. Currently, there is no other transportation service available in the Salem-Keizer area like Cherriots Shop and Ride. This transportation service is an integral component of the complete transit network that specifically provides increased transportation options to seniors and individuals with disabilities to access their community and ultimately have independence that may or may not be otherwise an option for them without the Shop and Ride service.

The need for this project was identified in the Cherriots Coordinated Public Transit-Human Services Transportation Plan (2019), both for the service and maintenance of vehicles (Chapter 5), and in the Fleet Maintenance Plan. The Coordinated Plan includes an overview of existing public transportation services, a needs assessment, strategies and priorities for addressing needs.

**e.) Expected outcomes**

*Describe the expected outcomes of this project on seniors and people with disabilities. Why is this project the best method to address the previously described need? Max 2,500 characters/approx. limit: 400 words*

The expected outcome of this project is that seniors and individuals with disabilities will continue to be supported with safe and reliable transportation. The continuation of the Cherriots Shop and Ride transportation services and preventive maintenance of its fleet will ensure seniors have mobility options, resulting in increased access to their communities and vital services throughout the Salem-Keizer UGB. This will allow seniors and individuals with disabilities to access health, employment, social activities, human services, and volunteer opportunities, as well as access to grocery shopping. Specifically, the service is designed to offer transportation options for individuals who may or may not qualify for paratransit services and those who may not be able to access Cherriots Local fixed route service. With low fees per trip (\$3.20 for Dial-a-Ride or \$1.25 for Shopper Shuttler) and no qualifying application, increased ridership is anticipated as it also ensures equitable access. Shop and Ride is the best method to address the transportation needs of seniors and people with disabilities because it offers reliable and ADA accessible transportation designed to address their needs.

Shop and Ride outcomes will be measured by annual ridership of seniors and individuals with disabilities.

**Provide the timeline of the project in the following table**

	<b>Step Description</b>	<b>Completion Date</b>
<b>1</b>	Start Service	7/1/22
<b>2</b>	End Service	6/30/23
<b>3</b>		
<b>4</b>		
<b>5</b>		
<b>6</b>		

**2. Is your application for a replacement vehicle?**

Yes (continue to #3)  No (continue to Section C)

**3. Enter the following information about each vehicle to be replaced if the total cost of the vehicle is being requested:**

<b>Vehicle Category*</b> Choose an item.	<b>Qty (#)</b>	<b>Cost Each (\$)</b>	<b>Total (\$)</b>	<b>No. Seats w/ADA Deployed</b>	<b>No. of ADA Stations</b>	<b>Total Capacity</b>	<b>Fuel Type*</b> Choose an item.	<b>Estimated Order Date</b>	<b>Estimated Delivery Date*</b>
E 7			\$ 0.00				---		
--			\$ 0.00				---		
--			\$ 0.00				---		
--			\$ 0.00				---		
--			\$ 0.00				---		
<b>Totals:</b>	0	<b>Grand Total:</b>	\$ 0.00						

**\*Vehicle Category Descriptions:**

<https://www.oregon.gov/ODOT/RPTD/RPTD%20Document%20Library/Vehicle-Useful-Life-Benchmarks.pdf>

\*Fuel Type Options: (G) Gas, (D) Diesel, (B) Biodiesel, (HG) Hybrid-gas, (HD) Hybrid-diesel, (CNG) Compressed Natural Gas, (OF) Other alternative Fuel.

\***Estimated Delivery Date:** Minimum 160 days if ADA accessible.

**C. ORGANIZATIONAL CERTIFICATION**

By submitting this document via email to Cherriots, I certify that the submitted materials and data included are complete, true and correct. Also, I certify that my organization is:

- Eligible to enter into agreements with Cherriots;
- Has the legal, managerial, and operational capacity to do the work to be paid for by the Section 5310;
- Not debarred or suspended from federal grants;
- In compliance with federal, state, and local laws and regulations including, and not limited to, those pertaining to passenger transportation, civil rights, labor, insurance, safety, and health, as applicable;
- Complies with the laws or rules of the Section 5310 Program;
- Properly uses and accounts for the Section 5310 Program’s goals; and
- Will operate the project or service in a safe, prudent, and timely manner.



Grants Administrator

12/8/2022

---

Signature of Authorized Organization Officer

Title

Date



**Private Nonprofit Agency – Corporation Status Inquiry and Certification**

If your agency or organization is claiming eligibility as a Section 5310(FTA) Program applicant based on its status as a private nonprofit organization, you must obtain verification of its incorporation number and current legal standing from the Oregon Secretary of State Information Retrieval/ Certification & Records Unit (IRC Unit). The “Status Inquiry” document must be attached as an appendix to the application. To assist your agency or organization in obtaining this information, use one of these two methods:

To obtain Corporate Records Information over the Internet, go to:  
<http://sos.oregon.gov/business/Pages/find.aspx> Enter the name of your agency or organization. If its status is active, print the page and submit it as proof.

**Private Non-profits**

Legal Name of Non-profit Applicant: \_\_\_\_\_

State of Oregon Articles of Incorporation Number: \_\_\_\_\_

Date of Incorporation: \_\_\_\_\_

**Certifying Representative**

Name (print):	
Title (print):	
Signature:	Date



# **2022** SECTION 5310 (FTA) GRANT *APPLICATION*

*FOR PROJECTS LOCATED WITHIN THE SALEM-KEIZER URBAN GROWTH BOUNDARY*

*JULY 2022*

## INTRODUCTION

- Read the *2022 Section 5310(FTA) Grant Application Instructions* prior to completing this application.
- Each project submitted for funding consideration must have its own application.
- Selection criteria are detailed in the *Application Instructions*.
- This form must be filled out using the Adobe .pdf form. Paper applications will NOT be accepted.
- Unless documents are signed with an official electronic signature service, signature pages should be scanned and attached as separate pages to each application.

### Submittal Checklist

#### ***Make sure***

- ✓ Application is complete, signed, and dated

#### ***Submit***

- ✓ Proof of agency status (template included in application packet)
- ✓ Maintenance Plan (if submitting an application for preventive maintenance)

### A. ORGANIZATION INFORMATION

**Name of Organization:** Salem Area Mass Transit District

**Contact Person:** Peggy Greene

**Address:** 555 Court Street NE Suite 5230, Salem, OR

**Telephone:** (503) 361-7530

**Email:** peggy.greene@cherriots.org

**Type of organization (check one)**

Private non-profit	<input type="checkbox"/>
State, county, tribal, or local government agency	<input checked="" type="checkbox"/>

**Area of service (check one)**

Inside the Salem-Keizer Urban Growth Boundary (UGB)	<input checked="" type="checkbox"/>
Outside the Salem-Keizer UGB	<input type="checkbox"/>
Both inside and outside the Salem-Keizer UGB	<input type="checkbox"/>

**Organization days and hours of operation**

Day	Hours
Sunday	
Monday	8:00 AM – 5:00 PM
Tuesday	8:00 AM – 5:00 PM
Wednesday	8:00 AM – 5:00 PM
Thursday	8:00 AM – 5:00 PM
Friday	8:00 AM – 5:00 PM
Saturday	
Please list any planned periods of service closure greater than 3 days (i.e., closed the week between Christmas Day and New Year's Day)	None

**Total transportation program costs by year**

FY21 (historical data, if applicable)	FY22 (actual)	FY23 (projected)
\$ 8,140,566.00	\$ 10,409,894.00	\$ 12,370,796.00

**B. PROJECT INFORMATION**

**Project title** (will be used for reviewer reference and in public comment process. Example: *Mobility Management for XYZ volunteer driver program*)

Cherriots Shop and Ride Operations/Purchase of Service

**Project service area to be served** (indicate the geographic features that define your service area such as streets, rivers, or jurisdictional boundaries)

North boundary	
West boundary	
South boundary	
East boundary	
Other general geographic area (i.e., within the Salem-Keizer UGB)	Within the Salem-Keizer UGB

*Optional:* please provide a map of your service area as a separate single page 8.5"x11" attachment.

**Total Section 5310(FTA) funds requested**

\$ 150,000.00
---------------

**Start date**

7/1/22
--------

**Funding request type (check one)**

Continuation of existing service at same level of service	<input checked="" type="checkbox"/>
Expansion of existing service	<input type="checkbox"/>
New service	<input type="checkbox"/>
Capital request	<input type="checkbox"/>
Other:	<input type="checkbox"/>

--

**Scalable Section 5310(FTA) Grant Request**

*You are strongly encouraged to request the full amount of funding that is needed for each project, including funding for new projects; however, funding is limited. Describe the scalability of your 5310(FTA) funding request, how you scaled down your request and what aspects of the program would not be funded under this funding scenario below. Then enter your scaled down request amounts.*

**Scalability Description:**

Scalability of this project would be difficult without utilizing general funds, which are not available and have not been budgeted to be allocated to this project. Cherriots is requesting the full budget only.

**FY23**

Scaled request: \$ 150,000.00

**Identify the project's additional sources of funding in the table below**

<b>Estimated Additional Project Resources</b>	
<b>Source of Funds</b>	<b>Dollar Amount</b>
2021 Section 5310(FTA) Grant Request ( <i>Important!</i> )	\$ 150,000.00
Local Resources	\$
Federal Resources	\$
Other (provide description): ODOT STIF Formula, population-based	\$ 37,500.00
<b>Project Grand Total</b>	<b>\$ 187,500.00</b>

**Coordinated Plan**

Is project derived from the Cherriots *Coordinated Public Transit – Human Services Transportation Plan* dated September 2019?  Yes  No If yes, what page?

38

If no, explain why the project is not part of the Coordinated Plan.

*For example: Is the project part of another plan (please name)? Is the plan still being finalized?*

## 1. Project description

### a.) Describe services or capital investment to be provided by Section 5310(FTA) funding. Include a description of the following:

- Who you will serve? What geographic area you will serve?
- What level of service will be provided to customers?
- Operational activities; how will customers request and receive rides, including scheduling and dispatching?
- Describe if volunteers will be utilized to provide service and how this will occur (will the volunteer program be supported with 5310(FTA) or other funds? Will you provide mileage reimbursement to volunteers using their own vehicles?).
- **How will the service be marketed?** (500 word limit)

This project will fund the operations for Cherriots Shop and Ride, including purchase of service. Shop and Ride provides Shopper Shuttle and Dial-a-Ride (demand responsive) transportation services to seniors age 60 and older and individuals with disabilities within the Urban Growth Boundaries (UGB) of Salem and Keizer. Scheduling is by reservation. Riders call the Cherriots Call Center up to two weeks in advance or within 24 hours of their requested trip to make reservations. Shop and Ride is operated by a contractor and Salem Area Mass Transit District (SAMTD) employs two staff to oversee the Shop and Ride program. Volunteers will not be used for this service. Services are available to any senior age 60 or older and individuals with disabilities; no application is required to qualify for services and all Shop and Ride vehicles are ADA accessible.

The Dial-a-Ride service provides transportation from the rider's home and to any location within the UGB Monday through Friday 8 AM-5 PM for \$3.20 per time the bus is boarded. Medical appointments have priority when making trip reservations on Dial-a-Ride. The Dial-a-Ride service observes the same holiday closures as Cherriots Local fixed routes. Riders can bring one additional passenger or personal care attendant when using Dial-a-Ride or Shopper Shuttle.

Currently, the Shopper Shuttle service is suspended due to COVID-19 and limited capacity. When the shuttle operates, it provides AM and PM shopping trips to predetermined stores within the Salem-Keizer UGB Tuesday through Friday 8:15 AM-5:15 PM for \$1.25 per time the bus is boarded. This origin-destination service offers a schedule for riders to choose from when reserving a trip.

In fiscal year 2022, Shop & Ride provided service with 4,356 UPT (unduplicated passenger trips). Shop and Ride is marketed through social media, the Cherriots website, targeted mailers, advertisements in local newspapers, and in-person promotion of services at informational tables and community presentations.

Shop and Ride provides transportation for seniors, individuals with disabilities, low-income populations, and senior housing communities, offering vital access to services and serving as a social outlet to many who may have limited means of transportation and are generally at home alone.

**b.) Will you coordinate between providers to avoid duplication?** *Describe what level of coordination between partners is done and how duplication is avoided, limit 200 words*

The phrase mobility management is by definition inclusive of regional partners. One of the goals of the project is assistance in coordinating projects to avoid duplication. This coordination is primarily performed by the Cherriots Call Center when trips are scheduled for riders both inside and outside of the Salem-Keizer UGB on Cherriots LIFT, Shop and Ride and the Route 45 in Polk County. The call center staff provide referrals for a variety of appropriate and available transportation services to fit the needs of riders.

Additionally, the Cherriots Call Center also supports coordination if services throughout the region by referring callers when appropriate to other providers and public transportation outside of the Cherriots transportation services that are available (e.g., SMART out of Wilsonville, Tillamook County Transit transportation services from Salem to the Oregon Coast, Amtrak, and Greyhound).

**c.) Is your project cost-effective?**

*Describe average cost per ride, cost per mile and cost per hour, limit 200 words*

The average cost per ride could be calculated based on the number of rides provided and total project costs (e.g., preventive maintenance, purchase of service, call center, and staff time managing the project). The project is cost-effective considering the number of rides (4,356 UPT) provided in 2022 at approximately \$68 per ride and given the significant service provided for the community. The cost per revenue hour is based on the actual contracted transportation services, contract. For calendar year 2022, the cost per revenue hour was \$60.10 per the schedule in the contract. Shop & Ride operated 2,931 revenue hours in fiscal year 2022.



**d.) Project quality**

*Describe the **need** for this project. How was this need determined or assessed? Max 2,500 characters/approx. limit: 400 words*

Cherriots Shop and Ride provides a vital unmet need by providing essential public transportation specifically for individuals with disabilities and seniors 60 and older who may or may not be eligible for ADA paratransit and/or may or may not be able to access fixed route transportation services. The services are designed to address the needs of this population with ADA-accessible transportation and offering services without a qualifying application. Shop and Ride lowers barriers to accessing transportation by offering low fees for service and without an application or assessment to qualify riders.

Riders of Shop and Ride are in need of direct, origin-to-destination trips to locations that have multiple errand opportunities as opposed to accessing fixed route services due to their individual ability. Cherriots Shop and Ride transportation service ensures that seniors 60 and older as well as individuals with disabilities can maintain independence and access their communities. Currently, there is no other transportation service available in the Salem-Keizer area like Cherriots Shop and Ride. This transportation service is an integral component of the complete transit network that specifically provides increased transportation options to seniors and individuals with disabilities to access their community and ultimately have independence that may or may not be otherwise an option for them without the Shop and Ride service.

The need for this project was identified in the Cherriots Coordinated Public Transit-Human Services Transportation Plan (2019), both for the service and maintenance of vehicles (Chapter 5), and in the Fleet Maintenance Plan. The Coordinated Plan includes an overview of existing public transportation services, a needs assessment, strategies and priorities for addressing needs.

**e.) Expected outcomes**

*Describe the expected outcomes of this project on seniors and people with disabilities. Why is this project the best method to address the previously described need? Max 2,500 characters/approx. limit: 400 words*

The continuation of the Cherriots Shop and Ride transportation services will ensure seniors have mobility options that are safe, friendly, and reliable, resulting in increased access to their communities and vital services throughout the Salem-Keizer UGB. This will allow seniors and individuals with disabilities to access health, employment, social activities, human services, and volunteer opportunities, as well as access to grocery shopping. With low fees per trip (\$3.20 or \$1.25, depending on the service) and no qualifying application, increased ridership is anticipated as it also ensures equitable access. Shop and Ride is the best method to address the transportation needs of seniors and people with disabilities because it offers reliable and accessible transportation designed to address their needs. Shop and Ride outcomes will be measured by annual ridership of seniors and individuals with disabilities.

**Provide the timeline of the project in the following table**

	<b>Step Description</b>	<b>Completion Date</b>
<b>1</b>	Start Service	7/1/22
<b>2</b>	End Service	6/30/23
<b>3</b>		
<b>4</b>		
<b>5</b>		
<b>6</b>		

**2. Is your application for a replacement vehicle?**

Yes (continue to #3)  No (continue to Section C)

**3. Enter the following information about each vehicle to be replaced if the total cost of the vehicle is being requested:**

<b>Vehicle Category*</b> Choose an item.	<b>Qty (#)</b>	<b>Cost Each (\$)</b>	<b>Total (\$)</b>	<b>No. Seats w/ADA Deployed</b>	<b>No. of ADA Stations</b>	<b>Total Capacity</b>	<b>Fuel Type*</b> Choose an item.	<b>Estimated Order Date</b>	<b>Estimated Delivery Date*</b>
E 7			\$ 0.00				---		
--			\$ 0.00				---		
--			\$ 0.00				---		
--			\$ 0.00				---		
--			\$ 0.00				---		
<b>Totals:</b>	0	<b>Grand Total:</b>	\$ 0.00						

**\*Vehicle Category Descriptions:**

<https://www.oregon.gov/ODOT/RPTD/RPTD%20Document%20Library/Vehicle-Useful-Life-Benchmarks.pdf>


\*Fuel Type Options: (G) Gas, (D) Diesel, (B) Biodiesel, (HG) Hybrid-gas, (HD) Hybrid-diesel, (CNG) Compressed Natural Gas, (OF) Other alternative Fuel.

\***Estimated Delivery Date:** Minimum 160 days if ADA accessible.

**C. ORGANIZATIONAL CERTIFICATION**

By submitting this document via email to Cherriots, I certify that the submitted materials and data included are complete, true and correct. Also, I certify that my organization is:

- Eligible to enter into agreements with Cherriots;
- Has the legal, managerial, and operational capacity to do the work to be paid for by the Section 5310;
- Not debarred or suspended from federal grants;
- In compliance with federal, state, and local laws and regulations including, and not limited to, those pertaining to passenger transportation, civil rights, labor, insurance, safety, and health, as applicable;
- Complies with the laws or rules of the Section 5310 Program;
- Properly uses and accounts for the Section 5310 Program’s goals; and
- Will operate the project or service in a safe, prudent, and timely manner.



Grants Administrator

12/8/2022

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Signature of Authorized Organization Officer

Title

Date

**Private Nonprofit Agency – Corporation Status Inquiry and Certification**

If your agency or organization is claiming eligibility as a Section 5310(FTA) Program applicant based on its status as a private nonprofit organization, you must obtain verification of its incorporation number and current legal standing from the Oregon Secretary of State Information Retrieval/ Certification & Records Unit (IRC Unit). The “Status Inquiry” document must be attached as an appendix to the application. To assist your agency or organization in obtaining this information, use one of these two methods:

To obtain Corporate Records Information over the Internet, go to:  
<http://sos.oregon.gov/business/Pages/find.aspx> Enter the name of your agency or organization. If its status is active, print the page and submit it as proof.

**Private Non-profits**

Legal Name of Non-profit Applicant: \_\_\_\_\_

State of Oregon Articles of Incorporation Number: \_\_\_\_\_

Date of Incorporation: \_\_\_\_\_

**Certifying Representative**

Name (print):	
Title (print):	
Signature:	Date



# BOARD MEETING MEMO

Agenda Item H.1

**To:** Board of Directors  
**From:** Allan Pollock, General Manager  
**Date:** January 26, 2023  
**Subject:** Election of Board Secretary

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## ISSUE

Shall the Board elect a member to fill the vacant board secretary officer position?

## BACKGROUND AND FINDINGS

At the xxxxxx board meeting Director Chi Nguyen submitted her resignation as a result of relocating outside of her Subdistrict. Director Nguyen was elected the Board Secretary at its July 2021 meeting with a term ending on June 30, 2023.

As a result of her resignation the Secretary position is now vacant. According to Board ByLaws, as Amended & Restated in Resolution No. 2020-08, Rule 10 when a vacancy occurs in any office other than by expiration of the officer's term, the vacancy shall be filled by election by the Board of Directors when the need arises and the newly-elected officer shall take office immediately upon election, and shall serve the remainder of the unexpired term.

## FINANCIAL IMPACT

None

## RECOMMENDATION

Staff recommends the Board hold an election for the vacant Secretary Officer position for term ending June 30, 2023.

## PROPOSED MOTION

**None**

**SAMTD Board of Directors  
Election of Officers  
January 26, 2023**

**Office of: SECRETARY**

**Term: January 26, 2023 – June 30, 2023**

**... or until a successor is duly appointed and qualified**

<b>SUBDISTRICT</b>	<b>BOARD MEMBER</b>	<b>VOTE FOR ONE</b>
# 1	Vacant	
# 2	Ramiro Navarro Jr.	
# 3	Sadie Carney	
# 4	Maria Hinojos Pressey	
# 5	Ian Davidson	
# 6	Sara Duncan	
# 7	Bill Holmstrom	

**Signed by:** \_\_\_\_\_



**OATH OF OFFICE**

**STATE OF OREGON**        )  
                                  )       **ss**  
**County of Marion**        )

I, \_\_\_\_\_ being first duly sworn or affirmed, upon oath say:  
**THAT** I will support the Constitution and laws of the United States and the State of Oregon, and that I will faithfully perform my duties as **Secretary** of the Board of Directors of the Salem Area Mass Transit District for the period beginning January 26, 2023 and ending June 30, 2023 or until my successor is duly appointed and qualified.

\_\_\_\_\_  
Secretary

**SIGNED AND AFFIRMED OR SWORN** to before me this 26<sup>th</sup> day of January 2023.

\_\_\_\_\_  
Kirra Christine Pressey  
Notary Public for Oregon  
My Commission Expires:



**To:** Board of Directors  
**From:** Allan Pollock, General Manager  
**Date:** January 26, 2023  
**Subject:** Adoption of Proposed 2023 Federal and State Legislative Agenda

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## ISSUE

Shall the Board adopt the proposed 2023 federal and state legislative agenda?

## BACKGROUND AND FINDINGS

The Board annually adopts a legislative agenda to set direction for legislative activities. The agenda is used as a guide when responding to legislative matters and as a communication tool with legislators and other interested parties.

On January 11, 2023, the Board's Legislative Committee met to develop the proposed legislative agenda for the District in conjunction with staff and representatives of CFM Advocates, the District's legislative consultant. The proposed 2023 federal and state legislative agendas are included as Attachments A and B respectively. The District's proposed agendas identify legislative priorities and projects for annual appropriations and grant opportunities.

## FINANCIAL IMPACT

None

## RECOMMENDATION

The Legislative Committee recommends that the Board adopt the 2023 federal and state legislative agendas as shown in Attachment A and B respectively.

## PROPOSED MOTION

**I move that the Board adopts the 2023 federal and state legislative agendas as shown in Attachment A and B respectively.**

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## 2023 FEDERAL LEGISLATIVE AGENDA

### FUNDING REQUESTS

#### PROJECT DESCRIPTION

#### REQUEST

##### **Zero Emission Buses**

**\$7,441,000**

SAMTD is requesting funds to acquire (5) zero emission buses and supporting infrastructure that will support Cherriots’ transition to a clean, no emission fleet and replace (5) diesel buses that are exceeding their useful life. Replacing these old, unreliable and energy inefficient buses will reduce maintenance costs and meet our sustainability objectives in the Salem region, which is a maintenance area for Carbon Monoxide and Ozone.

*Account: FTA Low or No Emission Grant Program*

##### **South Salem “MaaS” Transit Facility**

**\$7,765,000**

The South Salem Mobility as a Service (MaaS) Transit Facility is a planned transit center in south Salem centered around MaaS, an approach to deliver transportation options with right-sized service best suited to different parts of the community. This project will establish a mobility hub that not only includes local and regional fixed route buses, paratransit vehicles, and neighborhood circulators, but will also be designed with flexibility to accommodate micro-transit, transportation network company vehicles, bike share/scooter share, bicycles, pedestrians, and drop-off and pick-up spaces for easy connections between car and bus. SAMTD will also look to include a smaller park and ride area, and establish super-stops located around south Salem to facilitate more convenient transfers between circulating and mainline routes. In addition to encouraging transportation alternatives to personal vehicles, this facility will reduce SAMTD’s carbon footprint by incorporating green elements throughout, including battery-electric bus charging in support of SAMTD’s ongoing transition of its entire bus fleet to zero-emission technology.

*Account: FTA Bus and Bus Facility Grant Program*

### POLICY PRIORITIES

#### **Plus-Up for Bus and Bus Facilities Funding**

SAMTD supports The Bus Coalition’s (TBC) request to plus-up the Bus and Bus Facility competitive grant program (5339b) within the Fiscal Year 2024 Appropriations legislation and provide flexibility to the FTA to address cost escalations for previous, current, and future grant recipients. Demand for bus transit funds remains at an all-time high. In 2022, the Bus and Bus Facility competitive grant program received \$7.8 billion in funding requests for \$1.6 billion available. This is the largest oversubscription in the program’s history. In addition, cost escalations are impacting previous, current, and future bus purchase orders and transit facility construction projects. Ultimately, TBC’s request for \$400 million in plus-up funds would maximize federal investment and help address the tremendous demand across the nation’s bus transit systems.

#### **Make Permanent the Alternative Fuels Tax Credit**

The Alternative Fuels Tax Credit helps transit systems reduce their emissions by providing a tax credit for a portion of costs associated with alternative fuel use. SAMTD receives an annual benefit of \$200,000 for SAMTD operations. The credit was recently extended by the Inflation Reduction Act but is set to expire at the end of 2024. We support a permanent extension of the provision to provide long-term support and certainty for SAMTD and other agencies in the pursuit to reduce emissions.



#### CONTACT:

Allan Pollock, General Manager/CEO  
Salem Area Mass Transit District,  
503.588.2424; [allan.pollock@cherriots.org](mailto:allan.pollock@cherriots.org)

Joel Rubin, CFM Advocates  
202.347.9171; [joelr@cfmdc.com](mailto:joelr@cfmdc.com)

**BD 132**



## 2023 STATE LEGISLATIVE AGENDA

Salem Area Mass Transit District (aka Cherriots) has established as its top 2023 legislative priorities to preserve, maintain and enhance public transportation investments and the monitoring of zero-emission vehicle investment opportunities.

Priority	Item
1	<b>Preserve, Maintain and Enhance Public Transportation Investments.</b> <i>Work with OTA, ODOT, transit advocates and others to preserve, maintain and enhance funding for public transportation investments. Protect against efforts to reduce transit funding resulting from the statewide transit employee payroll tax.</i>
1	<b>Zero-emission Vehicles.</b> <i>Monitor opportunities to increase investments in zero-emission vehicle transit infrastructure throughout the state.</i>
2	<b>Support Increased Investments on Footpaths and Bicycle Trails.</b> <i>Monitor discussions and activity surrounding legislative concepts and budget appropriations that would increase investments on footpaths and bicycle trails.</i>
3	<b>HB 277</b> – <i>Authorizes city or county to impose a public transit incentive surcharge on any fine for violation of city or county motor vehicle parking code. (Representative Evans)</i>
3	<b>I-5 Bridge Replacement Conversations.</b> <i>Monitor discussions and budget allocations involving the replacement of the I-5 bridge between Portland and Vancouver.</i>
3	<b>TNC Legislation – Uber/Lyft.</b> <i>Monitor legislation and potentially advocate.</i>
3	<b>Tolling</b> – <i>Monitor discussions and budget allocations involving tolling issues throughout the state.</i>
3	<b>NEMT Legislative Concept</b> – <i>Monitor legislative or agency regulatory discussion around this issue.</i>

In addition, Cherriots supports the Oregon Transit Association (OTA) legislative priorities for the 2023 legislative session. As particular bills work through the system, CFM will work with Cherriots leadership to monitor and report on any legislative concepts which may impact the District and prepare an appropriate response.

Contact:

Allan Pollock, General Manager Cherriots  
503.588.2424 [allan.pollock@cherriots.org](mailto:allan.pollock@cherriots.org)

Dale Penn II, CFM Advocates  
503.510.2200 [dalep@cfmpdx.com](mailto:dalep@cfmpdx.com)



**To:** Board of Directors

**From:** Christina Conner, Chief Human Resources Officer

**Thru:** Allan Pollock, General Manager

**Date:** January 26, 2023

**Subject:** Business Insurance Broker Services Contract

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## **ISSUE**

Shall the Board authorize the General Manager to execute a three-year contract with four one-year renewal options with Brown & Brown Northwest to provide business insurance brokerage services for a total cost not-to-exceed \$213,240?

## **BACKGROUND AND FINDINGS**

The District maintains a portfolio of insurance policies meant to protect the District from financial impact of losses in a wide range of exposures. Insurance policies in place include: commercial property, boiler & machinery, earthquake, flood, inland marine, crime, general liability, directors and officers liability, professional liability, employment practices liability, umbrella/excess liability, commercial auto, pollution/storage tank liability, cyber liability and workers' compensation. Insurance is secured through a contracted business insurance broker. The broker provides the following key services for the purpose of securing insurance coverages:

- a. Evaluate District's business practices regarding risk and possible transfer of risk to third parties, and conduct regular, scheduled meetings with District to review District's risk management program.
- b. Review and analyze District's existing insurance coverage, and identify potential lines of coverage or coverage enhancements to improve District's insurance program.
- c. Analyze current insurance market conditions and advise District of significant implications for District's insurance program.
- d. Facilitate, market, and procure quotations from carriers; review and analyze quotations and provide proposals for review by District.
- e. Secure and bind all coverages accepted by District.
- f. Coordinate loss prevention services provided by any insurance company with those services provided by Broker. Develop a work plan, in collaboration

with the District, to establish activities, deliverables, staffing and other matters pertinent to the delivery of the requested services.

- g. Analyze past and current claim and loss history information on quarterly basis and advise the District of significant implications for District's risk and insurance programs. Submit quarterly reports (unless as may be requested by the District) indicating the number of claims open, claims closed, and total incurred values.
- h. Assist District in handling large, complex, or catastrophic losses at no additional cost.
- i. Notify and obtain prior approval by the District of any change to the account service team. The District reserves the right to require the Contractor to change any or all members of the services team at any time. The Contractor must replace such identified team member(s) with individual(s) acceptable to the District within 30 days of request from the District, unless as may otherwise be agreed to by the District.
- j. From time to time, the District may require Respondent to place additional coverage when requested by the District, with full disclosure of compensation to all parties involved. Separate compensation will be negotiated when requested. Such additional coverages would be incorporated into the contract in accordance with the Additional Services provision as applicable

In October, 2022, the District issued a Request for Proposal 22-033 for Business Insurance Broker Services. Two responsive proposals were received. After careful review by a Source Evaluation Committee (SEC), Brown & Brown Northwest scored the highest and was selected as the proposer who most closely met the District's requirements.

## FINANCIAL IMPACT

The contract with the broker would be for three years with four one-year renewal options.

Year 1	\$ 27,829
Year 2	\$ 28,664
Year 3	\$ 29,524
<b>Base Contract Sub Total</b>	<b>\$ 86,017</b>
Year 4	\$ 30,409
Year 5	\$ 31,322
Year 6	\$ 32,262
Year 7	\$ 33,230
<b>Options Years 4-7 Sub-total</b>	<b>\$ 127,223</b>
<b>Total 7 year Cost</b>	<b>\$ 213,240</b>

Funding for Year 1 of this proposed contract's portion of cost (through June 30, 2023) is included, under the General Fund in the FY2022-23 Adopted Budget. Funding for the remaining cost of Year 1 and each subsequent contract year will be included in the Proposed Budget of each respective fiscal year.

### **RECOMMENDATION**

Staff recommends that the Board authorize the General Manager to execute a three-year contract with four one-year renewal options with Brown & Brown Northwest to provide business insurance brokerage services for a total cost not-to-exceed \$213,240.

### **PROPOSED MOTION**

**I move that the Board authorize the General Manager to execute a three-year contract with four one-year renewal options with Brown & Brown Northwest to provide business insurance brokerage services for a total cost not-to-exceed \$213,240 (Two Hundred Thirteen Thousand Two Hundred Forty Dollars).**





**To:** Board of Directors

**From:** Allan Pollock, General Manager

**Date:** January 26, 2023

**Subject:** Board Member Committee Report

**ISSUE**

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

**BACKGROUND AND FINDINGS**

Board members are appointed to local, regional, or national committees. Board members also present testimony at public hearings on specific issues as the need arises on behalf of SAMTD. Board members may take this opportunity to report committee updates or on any meetings or items of note relating to District business.

Subdistrict 1 VACANT	Diversity, Equity, and Inclusion Committee West Salem Business Association
Subdistrict 2 Director Navarro	Keizer Chamber of Commerce Forum Keizer Chamber Government Affairs Committee State Transportation Improvement Fund Advisory Committee
Subdistrict 3 Director Carney	Salem-Keizer Area Transportation Study (SKATS)
Subdistrict 4 Director Hinojos Pressey	Citizens Advisory Committee
Subdistrict 5 Director Davidson	Mid-Willamette Valley Council of Governments (MWVCOG) Mid-Willamette Area Commission on Transportation (MWACT) Salem Chamber Public Policy Committee
Subdistrict 6 Director Duncan	SEDCOR
Subdistrict 7 Director Holstrom	