



Salem Area Mass Transit District
BOARD OF DIRECTORS MEETING

Thursday, May 25, 2017 at 6:30 PM

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

AGENDA

A. CALL TO ORDER & NOTE OF ATTENDANCE

B. PLEDGE OF ALLEGIANCE – Secretary John Hammill

C. ANNOUNCEMENTS & CHANGES TO AGENDA

D. PRESENTATION

E. PUBLIC COMMENT

Each person’s comments are limited to three (3) minutes.

F. CONSENT CALENDAR

1. Approval of Minutes [Action]

- a. Minutes of the April 27, 2017 Regular Board Meeting **1**
- b. Minutes of the April 24, 2017 Special Board Meeting **9**

2. Routine Business

- a. Adopt the FY2018 Board Meeting Schedule **11**
- b. MV Contract Extension **13**
- c. Police Services Contract **15**

G. ITEMS DEFERRED FROM THE CONSENT CALENDAR

H. ACTION ITEMS

- 1. Approval of Vehicle Procurement**
 - a. Cherriots LIFT Vehicles **31**
 - b. Cherriots Regional Vehicles **33**
- 2. Adoption of the 2017 Title VI Program Updates **35****
- a. Resolution #2017-04 Policy #104 Language Assistance **37**
- b. Resolution #2017-05 Policy #108 Public Participation **43**
- c. Resolution #2017-06 Approve the 2017 Title VI Program and Direct
General Manager to Submit Document to the FTA by May 31, 2017 **59**

I. INFORMATION ITEMS

J. REPORTS

1. Finance Report – Third Quarter	63
2. Trip Choice Report – Third Quarter	71
3. Performance Report – Third Quarter	97
4. Board Member Committee Reports [<i>Receive and File</i>]	115
a. Minutes of the April 10, 2017 Board Work Session	117

K. BOARD & MANAGEMENT ISSUES

1. General Manager
2. Board President
3. Board of Directors

L. ADJOURNMENT

This is an open, public meeting at an accessible location. Special accommodations are available, upon request, for persons with disabilities. Services may be requested for sign language interpretation or languages other than English. To request accommodations or services, please call 503-588-2424 at least two business days prior to the meeting.

Esta es una reunión abierta y pública en un lugar accesible. Hay habitaciones especiales disponibles bajo petición para personas con discapacidades. Se pueden solicitar servicios de interpretación del lenguaje de señas o idiomas distintos del inglés. Para solicitar alojamiento o servicios, por favor llame al 503-588-2424 por lo menos dos días hábiles antes de la reunión.

Next Regular Board Meeting Date: Thursday, June 22, 2017

Regular Board meetings are televised and can be viewed on CCTV's website: www.cctvsalem.org.
Go to www.cherriots.org/board for an electronic copy of the Board's agenda packet.

Cherriots Administration Office ~ 555 Court Street NE, Suite 5230 ~ Salem, OR 97301
Phone (503) 588-2424 ~ Board of Directors Email Address: Board@cherriots.org

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

April 27, 2017

Index of Board Actions

Action

Page

Moved to approve the Consent Calendar: **4**
 1. Approval of the Minutes
 a. Minutes of the March 23, 2017 Board Meeting

Move to revise the original funding allocation of the 2017-2019 STF program funds with the amounts shown in Table 2; and direct the General Manager to submit a revised application for 2017-19 STF funds to the ODOT Rail and Public Transit Division. **4-5**

Applicant	Grant	Description	Requested Amount	Recommended Amount
SAMTD	STF	Operations (CARTS, CherryLift, RED Line), grant match and contingency	\$ 1,489,898	\$ 1,489,898
City of Woodburn	STF	Woodburn Transit System Services and replacement vehicle	\$ 476,489	\$ 410,000
City of Silverton	STF	Silver Trolley, 5311 Match	\$ 40,000	\$ 33,000
Salem Health West Valley Foundation	STF	Connections Van providing medical transportation	\$ 61,484	\$ 45,000
Salem Health	STF	Salem Health Medical Transportation Coordinator	\$ 82,335	\$ -
Partnerships in Community Living	STF	New Vehicle Purchase for Disability Supports and Services	\$ 54,216	\$ -
Total 2017-19 Marion-Polk Counties STF Allocation				\$ 1,977,898

Moved to approve the Title VI Equity Analysis for the Cherriots Regional service changes to go into effect May 8, 2017. **6**

Moved to accept the results of the Connector Pilot Project and officially close the pilot project period. During the transition period, extend the operation of the West Salem Connector through the end of December 2017 to allow staff the

time to further develop a fixed-route replacement, work with the community,
and implement the replacement on January 2, 2018. **6-7**

Moved to adopt Resolution #2017-03 authorizing the transfer of 22 bus shelters
to Central Oregon Intergovernmental Council (COIC) to support its Cascades
East Transit Program. **7**

Regular Board meetings are video recorded
and are available for viewing on the CCTV
website at www.cctvsalem.org.

Salem Area Mass Transit District
BOARD OF DIRECTORS MEETING

April 27, 2017

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

MINUTES

PRESENT:	President Robert Krebs; Directors John Hammill, Marcia Kelley, and Kathy Lincoln; ABSENT: Directors Colleen Busch, Jerry Thompson, and Steve Evans
Board	
Staff	Allan Pollock, General Manager; David Trimble, Chief Operating Officer; Paula Dixon, Director of Administration; Steve Dickey, Director of Transportation Development, Matt Berggren, Transit Planner II, Ted Stonecliffe, Long-Range Planning Analyst; Roxanne Beltz, Trip Choice Coordinator; Wendy Feth, Accountant, Linda Galeazzi, Executive Assistant; Ben Fetherston, SAMTD Legal Counsel
Guests	Ron Harding, City Manager, City of Aumsville and Vice-Chair, STF Advisory Committee

A. CALL TO ORDER AND NOTE OF ATTENDANCE 6:30 PM

President Krebs called the meeting to order and a quorum was present.

B. PLEDGE OF ALLEGIANCE led by Director John Hammill

C. ANNOUNCEMENTS AND CHANGES TO THE AGENDA - None

D. PRESENTATION - 2017 Western Region Sustainable Fleet Award 6:31 PM

Presenters: Patricia Feeny, Director of Communication
Gregg Thompson, Maintenance Manager

President Krebs received the 2017 Western Region Sustainable Fleet Award presented to Ms. Feeny and Mr. Thompson on behalf of the District at the Pacific Northwest's Alternative Fuels Transportation Summit and Expo in Portland on April 11, 2017. Sponsors of the award included the Columbia-Willamette, Rogue Valley, Western Washington, East Bay, Treasure Valley, Denver Metro, Southern Colorado, Northern Colorado, Grand Teton and Utah Clean Cities Coalitions. The Clean Cities program advances the nation's economic, environmental and energy security by supporting local actions to cut petroleum use in transportation. Clean Cities has saved more than 7.5 billion gallons of petroleum since its inception in 1993. There were 14 fleets evaluated on the extent to which their planning, management and ongoing operations conserve fuel, promote efficiencies, integrate alternative fuel

and advanced technology vehicles, minimize environmental impacts in communities historically disproportionately impacted by environmental harms; improve fleet performance over time; and embrace innovative practices or fleet technologies.

E. PUBLIC COMMENT –

Mark Knecht (address on file) – Mr. Knecht had questions about the bus shelter transfer to COIC. He also asked about improvements to the bus stop location near the Social Security Administration Office.

F. CONSENT CALENDAR

6:40 PM

Motion: Moved to approve the Consent Calendar:
2. Approval of the Minutes
a. Minutes of the March 23, 2017 Board Meeting

Motion by: Director Marcia Kelley
Second: Director John Hammill
Vote: Motion passed

G. ITEMS DEFERRED FROM THE CONSENT CALENDAR - None

H ACTION ITEMS

1. Approval of Allocation Changes to the FY2017-2019 Biennial STF Funding

6:41 PM

Staff report: Pages 7-10 in the agenda

Presenter: Ron Harding, Vice-Chair for the STF Advisory Committee

On February 23, 2017, the Board approved the 2017-2019 applications for STF, Section 5310 (ODOT) and Section 5310 (FTA) grants. The applicants were the District, the Cities of Woodburn and Silverton, West Valley Foundation, Salem Health and Partnerships in Community Living. At the April 4, 2017 STF Advisory Committee meeting, Salem Health advised the Committee of their decision to release the STF funds totaling \$20,000 allocated to its project. The STFAC moved to recommend to a reallocation of the funds.

Motion: Moved to revise the original funding allocation of the 2017-2019 STF program funds with the amounts shown in Table 2; and direct the General Manager to submit a revised application for 2017-19 STF funds to the ODOT Rail and Public Transit Division.

Table 2. Revised Recommendation Amounts for STF Projects

Applicant	Grant	Description	Requested Amount	Recommended Amount
SAMTD	STF	Operations (CARTS, CherryLift, RED Line), grant match and contingency	\$ 1,489,898	\$ 1,489,898

City of Woodburn	STF	Woodburn Transit System Services and replacement vehicle	\$ 476,489	\$ 410,000
City of Silverton	STF	Silver Trolley, 5311 Match	\$ 40,000	\$ 33,000
Salem Health West Valley Foundation	STF	Connections Van providing medical transportation	\$ 61,484	\$ 45,000
Salem Health	STF	Salem Health Medical Transportation Coordinator	\$ 82,335	\$ -
Partnerships in Community Living	STF	New Vehicle Purchase for Disability Supports and Services	\$ 54,216	\$ -
Total 2017-19 Marion-Polk Counties STF Allocation				\$ 1,977,898

Motion by: **Director John Hammill**
 Second: **Director Kathy Lincoln**
 Vote: **Motion passed**

2. Approval of Title VI Equity Analysis for the Cherriots Regional Service Change

6:45 PM

Staff report: Pages 11-26 in the agenda

Presenter: Matt Berggren, Planner II

The Board was apprised that the District is required to develop and submit a Title VI program to comply with the requirements of Chapter IV of FTA Circular 4702.1B every three years. Chapter IV applies only to providers of fixed-route transportation and does not make exceptions for the CARTS system even though it is funded separately and operates as a purchased service by an external contractor. The Title VI Program requires an equity analysis for major service changes. The District is not required to hold a public hearing since there are no decreases to any fixed-route services; and the District doesn't set policies by service type in its current program; but has one set of policies for all fixed routes. CARTS demand-responsive services on Routes 10, 20, 25, 30, 35, 40, and 50 will be eliminated so they don't need to be evaluated. The newly established fixed routes 10X, 20X, 30X, 40X, and 50X do not qualify as a "Major Service Change." The District will shift resources from the deviated-fixed routes to commuter express routes that fall under the classification of "fixed route" with the service change on May 8, 2017.

Motion: **Moved to approve the Title VI Equity Analysis for the Cherriots Regional service changes to go into effect May 8, 2017.**

Motion by: **Director Marcia Kelley**

Second: **Director John Hammill**

Vote: **Motion passed**

3. Approval of the Final Evaluation of the Connector Pilot Project and Development of a Fixed Route Proposal

6:49 PM

Staff report: Pages 27-64 in the agenda

Presenter: Matt Berggren, Planner II

The Board received a review of the West Salem Connector, an on-demand transit service, that began operation on June 1, 2015 as a one year pilot project; and on June 23, 2016 the Board of Directors extended the pilot through May 2017 to allow staff time to improve the service and build ridership. Staff recommended that the Board put the Connector program on hold. The District's priorities should take a step back from development, while continuing to be a resource to help other agencies understand what worked and didn't work with the Connector and why. They recommended that the Board accept the results of the Project and officially close the pilot project period. The operation of the West Salem Connector will be extended through the end of December 2017 to allow staff time to develop a fixed-route replacement, work with the community through public outreach, and implement a service replacement on January 2, 2018.

Motion: **Moved to accept the results of the Connector Pilot Project and officially close the pilot project period. During the transition period, extend the operation of the West Salem Connector through the end of December 2017 to allow staff the time to further develop a fixed-route replacement, work with the community, and implement the replacement on January 2, 2018.**

Motion by: **Director John Hammill**

Second: **Director Kathy Lincoln**

Vote: **Motion passed**

4. Resolution No. 2017-03 Approval to Authorize Transfer of Bus Shelters to Central Oregon Intergovernmental Council (COIC) Cascade East Transit (CET)

7:28 PM

Staff report: Pages 65-70 in the agenda

Presenter: David Trimble, Chief Operating Officer

The Board considered that the District was contacted by the Central Oregon Intergovernmental Council in Bend, Oregon regarding their need for shelters throughout their service area. Twenty-two of the District's bus shelters were removed from service in 2016 as part of the *Moving Forward* project. The shelters being transferred were no longer required to maintain service.

Motion: **Moved to adopt Resolution #2017-03 authorizing the transfer of 22 bus shelters to Central Oregon Intergovernmental Council (COIC) to support its Cascades East Transit Program.**

Motion by: **Director Marcia Kelley**

Second: Director Kathy Lincoln
Vote: Motion passed

I. INFORMATION ITEMS - None

- J. REPORTS 7:34 PM**
1. Board Subcommittee Report 7:29 PM
Board members are appointed to local, regional and/or national committees; and may present testimony at public hearings on specific issues on behalf of the District as the need arises. Board members inform the Board of District and/or transit-related issues discussed in the committees listed on pages 71-72 of the agenda.

Minutes of the April 4, 2017 STF Advisory Committee meeting and February 4, 2017 Board Planning Session on pages 73-94 were received and filed.

K. BOARD AND MANAGEMENT ISSUES

- 1. General Manager 7:45 PM**
Mr. Pollock reported on the progress of the state transportation bill. He thanked the Board and others who attended Transit Day on April 11, 2017 at the Capitol to include Mr. Knecht. Mr. Pollock reported that 25 children participated in the annual "Take Your Child to Work" Day at the District. He also thanked Directors Lincoln and Busch for attending the Administrative Professionals Recognition Luncheon. He noted that invitations have been sent out to board members for the June 3, 2017 Employee Recognition Dinner. Mr. Pollock will meet with Director Hammill to provide him with the information he requested about the procedures for shelter donations.
- 2. Board President 7:48 PM**
President Krebs reports on his transit-related Board and community service activities since the last board of directors meeting.
- 3. Board of Directors 7:50 PM**
Board members give an account, both verbally and in writing, of their transit-related Board and community service activities that may be of interest to the other Board members and to the public.

L. Meeting Adjourned 7:54 PM

Respectfully submitted,

Robert Krebs, President

Salem Area Mass Transit District
Board of Directors

~ **SPECIAL MEETING** ~

Monday, April 24, 2017
5:05 PM – 5:55 PM

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

MINUTES

PRESENT:	President Bob Krebs; Directors Kathy Lincoln, Colleen Busch, John Hammill, and Marcia Kelley
Board	ABSENT: Directors Jerry Thompson and Steve Evans
Staff	Allan Pollock, General Manager; David Trimble, Chief Operating Officer; Steve Dickey, Director of Transportation Development; Paula Dixon, Director of Administration; Patricia Feeny, Director of Communication; and Linda Galeazzi, Executive Assistant/Recording Secretary
Guests	Mike Jaffe, Program Director for Transportation, Mid-Willamette Valley Council of Governments (MWVCOG); Dale Penn, SAMTD Legislative Advocate, CFM Strategic Communications; and Russ Beaton, SAMTD Budget Committee

1. CALL TO ORDER

5:05 PM

President Krebs called the meeting to order. A quorum was present.

2. LEGISLATIVE CONCEPT PROPOSED FOR MPO TAXING DISTRICTS AS PART OF STATE TRANSPORTATION BILL

Staff Report: Pages 1-5 of the agenda

Presenter: Mike Jaffe, Program Director, MWVCOG

Board members received a briefing on a legislative concept (LC) introduced by Senator Boquist. The LC has not yet been submitted as a bill to be considered by the legislators. Senator Boquist proposes that a new excise tax on new vehicles sold in Oregon would go into a State Infrastructure Fund. A 1% excise tax raises \$73 million per year. Funds would be used for congestion and modernization projects in the Portland Metropolitan Planning Organization (MPO) area and other parts of the state.

Senator Boquist also supports the establishment of state-designated MPO area taxing districts. Enough revenue could be produced by adding a fuel tax and/or vehicle registration so that the Oregon Department of Transportation (ODOT) and the MPOs could share in the cost of major congestion relief transportation projects. A description of Senator Boquist's proposed concept is described on pages 1-2 in the special meeting agenda, and in the April 25, 2017 SKATS Policy Committee Meeting Agenda under agenda item *G. Potential Revenue Districts for MPO Areas* (by Mike Jaffe).

The LC is of particular interest to the Salem Keizer Area Transportation Study (SKATS). The MPO policy boards from Portland Metro and Central Lane support the MPO taxing district proposal and the cost sharing paradigm. They have asked for support from the Oregon Metropolitan Planning Organization (OMPOC). The SKATS policy committee meets on April 25 to discuss their concerns, and approval or disapproval of this proposed concept prior to the April 26 OMPOC meeting where there will be further discussion.

President Krebs provided the Board with a copy of positions for the Board to consider (herein entered into the minutes as Attachment A).

Direction: The Board provided feedback to President Krebs who is the District's SKATS and MPO representative. Board members were neutral on the MPO taxing district LC as long as it did not compete with the District's available funding sources. The new vehicle excise tax proposed is designated for roads and highways and is not available for transit funding. Board members oppose giving the MPOs authority to use property taxes as a revenue source. They support a dedicated statewide funding source for transit to be included in the transportation funding bill. An employee payroll tax proposed by the legislature at a one-tenth of one percent tax rate would support all transit agencies statewide. This tax would be about \$1.60 a month for a minimum wage employee working 40 hours a week.

3. SPECIAL MEETING ADJOURNED

5:55 PM

**SALEM AREA MASS TRANSIT DISTRICT
BOARD OF DIRECTORS**

**REGULAR BOARD MEETING DATES
FY 2018**

Work Session	Board Meeting
Monday, July 10, 2017	Thursday, July 27, 2017
Monday, August 14, 2017	Thursday, August 24, 2017
Monday, September 11, 2017	Thursday, September 28, 2017
Monday, October 16 , 2017	Thursday, October 26, 2017
Monday, November 13, 2017	---
---	Thursday, December 14, 2017
Monday, January 8, 2018	Thursday, January 25, 2018
Monday, February 12, 2018	Thursday, February 22, 2018
Monday, March 12, 2018	Thursday, March 22, 2018
Monday, April 9, 2018	Thursday, April 26, 2018
Monday, May 14, 2018	Thursday, May 24, 2018
Monday, June 11, 2018	Thursday, June 28, 2018

Work sessions are held on the second Monday of each month at 5:30 PM in the Senator Hearing Room at Courthouse Square.

Regular board meetings are held on the fourth Thursday of each month; except in November and December because of the holidays. There is no meeting in November and the December meeting is held on the second Thursday of the month. All of the regular board meetings begin at 6:30 p.m. in the Senator Hearing Room at Courthouse Square.

Courthouse Square is located at 555 Court Street NE between High Street and Church Street. The regular board meetings can also be viewed via television on CCTV's Channel 21 or on the Internet at www.cctvsalem.org.

MEMO TO: BOARD OF DIRECTORS

FROM: DAVID TRIMBLE, CHIEF OPERATING OFFICER

THRU: ALLAN POLLOCK, GENERAL MANAGER

SUBJECT: CONTRACT EXTENSION FOR CONTRACTED TRANSPORTATION SERVICES

Issue

Shall the Board authorize the General Manager to execute a six- (6) month contract extension with MV Transportation for Contracted Transportation Services to continue the provision of Cherriots LIFT, Cherriots Regional, Cherriots Shop and Ride, and the West Salem Connector Pilot Project?

Background and Findings

On June 25, 2015, the Board approved an action, which authorized the General Manager to enter into a contract with MV Transportation for Contracted Transportation Services, which included: Complementary ADA Paratransit Service (CherryLift), Chemeketa Area Regional Transportation Service (CARTS), and RED Line service. The current Contract is for a two-year term, from July 1, 2015, to June 30, 2017.

In preparation to re-procure this service, SAMTD staff engaged in an internal process to review the existing Contract to ensure the new request for proposal (RFP) was structured appropriately to provide for performance accountability and cost transparency. The Federal Transit Administration (FTA) requires the District to submit all RFP's utilizing federal funds for review. The FTA review has taken longer than expected and has delayed the solicitation process. Once the review is complete, the District is prepared to issue the RFP.

However, to continue the provision of Contracted Transportation Services without interruption, and until the successor contract is in place, it is necessary to extend the term of the current Contract from June 30, 2017, to December 31, 2017.

In response to the request for an extension, MV Transportation submitted a proposal for the six-month period at an increase of \$226,479 above the current contract amount.

Fiscal Impacts

Funds for this contract extension are included in the proposed FY 2018 budget.

Services	Current Authorized Rate per service hour	Proposed Rate for 6- month extension
Cherriots LIFT	\$ 44.37	\$ 50.32
Cherriots Regional	\$ 52.78	\$ 59.86
Cherriots Shop & Ride	\$ 40.20	\$ 45.69
Cherriots Connector Pilot	\$ 39.17	\$ 44.62
6-month totals	\$ 2,018,197	\$ 2,244,676

Recommendation

Staff recommends the Board authorize the General Manager to execute a six-month contract extension with MV Transportation for Contracted Transportation Services for the period July 1, 2017 to December 31, 2017 in the amount of \$2,244,676.

Proposed Motion

I move the Board authorize the General Manager to execute a six-month contract extension with MV Transportation for Contracted Transportation Services for the period July 1, 2017, to December 31, 2017 in the amount of \$2,244,676.

MEMO TO: BOARD OF DIRECTORS

**FROM: KAREN GARCIA, SECURITY AND EMERGENCY MANAGEMENT
MANAGER**

THRU: ALLAN POLLOCK, GENERAL MANAGER

SUBJECT: RENEWAL – POLICE SERVICES INTERGOVERNMENTAL AGREEMENT

Issue

Shall the Board renew the Intergovernmental Agreement (IGA) with the City of Salem for police services at the Downtown Transit Center at Courthouse Square?

Background and Findings

To ensure the safety, security, comfort and convenience for those who use our services, the District regulates conduct on its vehicles and property. In simple terms, customers need to show respect for fellow customers, transit employees, and for transit vehicles and facilities.

For many years, the District has benefited from an IGA with the City of Salem Police Department to provide uniformed officers at the Downtown Transit Center. Agreements are made under the authority of ORS 190.010. Both parties are public entities, each having a public interest in assuring adequate law enforcement in the vicinity of the Downtown Transit Center at Courthouse Square.

The term of the Agreement with the City of Salem Police Department covers two years, July 1, 2017 – June 30, 2019. On-call services of the Downtown Enforcement Team will be provided for a period of not-less-than forty-five (45) hours per week. A mutually-agreed upon schedule between the City and the District will identify the police officer's on-call hours of service. A dedicated police officer with direct cell phone contact will be available during the established hours of service.

The establishment of an on-call service with the Salem Police Department began July 1, 2012 as a part of the new security model which consists of a partnership between District staff, a private security provider, and the City of Salem Police Department. The model has provided our customers with consistency in presence and responsiveness using a team trained in similar yet distinct aspects of security and customer service.

Financial Impact

Total contract cost is listed in the table below:

FY 2017-18	FY 2018-19	Total
\$130,800	\$134,200	\$265,000

Funds for FY2017-18 are included in the proposed budget. FY 2017-18 reflects a 4.0% increase over FY2016-17 and a 2.6% increase from FY18 to FY19.

Recommendation

Staff recommends the board authorize the General Manager to finalize negotiations and enter into a not-to-exceed \$265,000 contract with the City of Salem for Police Services.

Proposed Motion

I move the board authorize the General Manager to finalize negotiations and enter into a not-to-exceed \$265,000 contract with the City of Salem for Police Services for the period July 1, 2017 - June 30, 2019.

or

I move that the Board adopt staff recommendation.

**INTERGOVERNMENTAL AGREEMENT
BETWEEN
THE CITY OF SALEM AND
THE SALEM AREA MASS TRANSIT DISTRICT
FOR
POLICE SERVICES (FY2017-2018 and FY2018-2019)**

This INTERGOVERNMENTAL AGREEMENT (hereinafter referred to as the “Agreement”) is made by and between the SALEM AREA MASS TRANSIT DISTRICT, an Oregon special district, acting by and through its governing body (hereinafter referred to as the “District”), and the CITY OF SALEM, an Oregon municipal corporation, acting by and through its governing body (hereinafter referred to as the “City”), referred to collectively herein as the “Parties.”

RECITALS

- A.** This Agreement is authorized under ORS 190.010 *et seq.*; and
- B.** The Parties have a public interest in assuring adequate law enforcement in the vicinity of the transit bus mall located within City of Salem (hereinafter referred to as the “Downtown Transit Center”); and
- C.** This Agreement is for the purpose of providing coordinated police services for the Downtown Transit Center. The Downtown Transit Center, as used herein, includes the one square-block area bordered by High Street NE, Court Street NE, Church Street NE and Chemeketa Street NE in the downtown area of the City of Salem and includes all sidewalks within that block of the Downtown Transit Center located at 220 High Street NE.
- D.** The Parties find that the performance of this Agreement is in the best interest of both the City and the District and that this undertaking will benefit the public.

AGREEMENT

NOW THEREFORE, THE PARTIES HEREBY AGREE AS FOLLOWS:

1. City Obligations

- 1.1 The City shall assign a minimum of one (1) sworn police officer on an on-call basis to respond directly to calls for police services at the Downtown Transit Center. “On-call” as used herein means the City shall provide the District with the ability to call a sworn officer assigned to the Downtown Enforcement Team directly should police services be necessary. Should officers from the Downtown Enforcement Team be unavailable, the City will ensure that the District has the phone number necessary to contact another on-duty Salem Police Officer directly. On-call status only applies to the hours and days specified in subsection 1.1.1 below.
 - 1.1.1 An assigned police officer shall be available to respond to the Downtown Transit Center on an on-call basis for a period of not less than forty five (45)

hours per week. The hours of on-call service will be from 1200 hrs to 2100 hrs Monday through Friday. The District will be provided with the phone number to the assigned officer for direct contact for police services at the Downtown Transit Center. The Parties understand that there may be times when an officer assigned to the Downtown Transit Center may not be available when, for example, responding to a critical police emergency.

- 1.1.2 The City will not be required to have an officer on-site at the Downtown Transit Center during the contractual period specified in subsection 1.1.1. The officer will be contacted via phone and should be within a distance to respond to the Downtown Transit Center in a timely fashion should police services be necessary.
 - 1.1.3 Should the District need police services outside the contractual period specified in subsection 1.1.1, the District should call the non-emergency or emergency numbers to Willamette Valley Communications Center (WVCC) and report the incident.
- 1.2 It is the intent of the Parties that any police officer assigned to on-call status at the Downtown Transit Center shall be part of the Downtown Enforcement Team and that any assignment to the Downtown Enforcement Team is intended to be for a minimum of two (2) years in length, where reasonably possible, in order to provide continuity. It is in the sole discretion of the City to determine the duration of an officer's assignment to the Downtown Enforcement Team. The officers on the Downtown Enforcement Team shall act as back-up for the officer assigned to on-call status at the Downtown Transit Center and shall provide relief for said on-call officer during meal breaks. In the event the on-call officer is on a break or is otherwise not available, the City will provide the District with the phone number to reach another officer in the event police services become necessary.
- 1.3 Except for cases involving an internal affairs investigation or where otherwise prohibited by law, by Court order, or by order of the Marion County District Attorney pursuant to Oregon's Public Records Law, the City shall make its daily Downtown Transit Center assignment records and statistical data for calls for service relating to the Downtown Transit Center and any statistical data related to the officer(s) assigned to on-call status at the Downtown Transit Center pursuant to Subsection 1.1 of this Agreement available to the District for inspection upon no less than seventy-two (72) hours prior written notice and between the hours of 8:00 a.m. and 5:00 p.m. weekdays excluding holidays on which there is no transit service. Any specific report that is requested by the District must meet the Public Records law requirements relating to the release of reports. The District understands that it is not the custodian of any of the City's records described under this subsection, and it shall not release any such City records to any third party or entity for any reason whatsoever.
- 1.4 Officers, upon being assigned to on-call status at the Downtown Transit Center, shall receive a briefing concerning the District's Police Ordinance 2000-1 as amended, Courthouse Square Police Ordinance 2004-01 as amended, Public Business

Ordinance 2000-2, Non-Smoking Ordinance 2000-3 as amended, and diversity and customer services issues pertinent to District operations. Records of these briefings shall be maintained by the supervisor of the assigned officers, documenting the date of the briefing and who attended. Officers assigned to the Downtown Enforcement Team and those assigned to on-call status with the District will have access to the District's private security company as well as the databases associated with Downtown Transit Center activity.

2. District Obligations

2.1 The District shall pay to the City the sum of **\$130,800.00 (one hundred and thirty thousand eight hundred dollars)** for the fiscal year beginning July 1, 2017, and ending June 30, 2018, and the sum of **\$134,200.00 (one hundred and thirty-four thousand two hundred dollars)** for the fiscal year beginning July 1, 2018, and ending June 30, 2019 for services provided pursuant to this two (2) year Agreement.

2.2 The District shall make four (4) equal payments to the City for fiscal year 2017-2018. These payments shall total the sum payable for that fiscal year as set forth in subsection 2.1 above. These payments shall be made quarterly on or before the fifteenth day following the **end** of each quarter of the fiscal year, e.g. on or before January 15, 2018, for the quarter commencing October 1, 2017, and ending December 31, 2018.

The District shall make four (4) equal payments to the City for fiscal year 2018-2019. These payments shall total the sum payable for that fiscal year as set forth in subsection 2.1 above. These payments shall be made quarterly on or before the fifteenth day following the **end** of each quarter of the fiscal year, e.g. on or before January 15, 2019, for the quarter commencing October 1, 2018, and ending December 31, 2019

2.3 The District shall designate one or more members of its staff as the liaison between the District and the City on transit security issues. The District shall acquire such security training for said designee(s) as may be necessary and shall provide the name(s) and contact phone numbers of said designee(s) to the City.

3. General Provisions

3.1 Term and Termination.

3.1.1 This Agreement shall be effective as of **July 1, 2017**, and shall continue in effect through and including **June 30, 2019**, unless earlier terminated as provided herein.

3.1.2 This Agreement may be terminated upon the mutual written consent of the Parties at any time.

3.1.3 Either Party to this Agreement may terminate this Agreement without cause at any time, upon not less than ninety (90) days' prior written notice to the other.

3.1.4 The District shall have the right to terminate this Agreement upon not less than thirty (30) days' prior written notice to the City in the event the District is dissatisfied with the police services supplied by the City, provided however, that the City has been given not less than thirty (30) days' advance written notice of the reasons for the District's dissatisfaction and the City has not cured same to the satisfaction of the District. If this Agreement is terminated by the District as set forth in this subsection, there shall be no refund of any quarterly payments made pursuant to Subsection 2.2 of this Agreement for the period prior to termination.

3.1.5 The City shall have the right to terminate this Agreement upon not less than thirty (30) days' prior written notice to the District in the event that the City is dissatisfied with the fulfillment of this Agreement by the District, provided however, that the District has been given not less than sixty (60) days' prior written notice of the reasons for the City's dissatisfaction and has not cured same to the satisfaction of the City.

- 3.2 Neither Party to this Agreement nor the officers, employees nor agents of either party are agents of the other. Each Party shall be separately and exclusively responsible for the acts, errors and omissions of its own officers, employees and agents. Nothing in this Agreement is intended to nor shall be construed to grant to the District any authority or responsibility to supervise, control, train, discipline or assign any police officer of the City. It is the limited purpose of this Agreement to provide assurance to the District that there will be an assigned police presence at the Downtown Transit Center and to assure the City that there will be funds available from the District to help defray the cost of that presence.
- 3.3 This Agreement shall be governed by the laws of the State of Oregon without regard to conflict of laws principles. Exclusive venue for litigation of any action arising under this Agreement shall be in the Circuit Court of the State of Oregon for Marion County. Each Party expressly waives any and all rights to maintain an action under this Agreement in any other venue, and expressly consents that, upon motion of the other party, any case may be dismissed or its venue transferred, as appropriate, so as to effectuate the choice of venue made in this section.
- 3.4 This Agreement sets forth the entire understanding between the Parties with respect to the subject matter hereof. All previous written and oral agreements, promises, representations, negotiations and course of dealings are hereby superseded and terminated. No evidence of any oral waiver or modification of this Agreement shall be offered or considered in any proceeding to determine or enforce the provisions of this Agreement.
- 3.5 This Agreement may not be altered, modified, supplemented, or amended in any manner whatsoever except by mutual agreement of the Parties set forth in writing and executed with the same formalities as this Agreement.
- 3.6 The Parties agree to observe and comply with all applicable laws, ordinances, rules, regulations and executive orders of the federal, state and local government now existing or hereinafter in effect which may in any manner affect the performance of

this Agreement. The following laws of the State of Oregon are hereby incorporated by reference into this Agreement: ORS 279B.220, 279B.230 and 279B.235.

- 3.7 Subject to the limitations established under the Oregon Constitution and the Oregon Tort Claims Act, each Party to this Agreement agrees indemnify, defend, save and hold harmless the other and the other's officials, agents and employees against any and all claims, demands, causes of action, suits, proceedings, damages, costs, reasonable attorney's fees or liabilities including appeals (hereinafter "Claims") arising out of, pertaining to or in any way connected to any negligent, reckless or intentional act, error or omission by that Party in the performance of any provision of this Agreement. Each Party shall give to the other notice in writing of any such Claims within twenty (20) days of the date that Party receives notice of any such Claims. Neither Party shall settle, compromise or take any action that may be prejudicial to the other Party's defense of or interest in such Claims without the express written consent of the other Party.
- 3.8 The Parties further agree that each shall obtain and maintain in full force at all times during the term of this Agreement, a policy of general liability insurance with liability limits of at least **\$2,000,000.00** (two million dollars) per occurrence, which names the other Party, its officers, agents, and employees as additional insured parties. The City, as a government body, may fulfill this insurance obligation through a program of self-insurance, provided that the self-insurance program complies with all applicable laws and provides insurance coverage equivalent to both type and level of coverage to that listed in this subsection.
- 3.9 In the event any term or provision of this Agreement shall be held to be invalid and unenforceable by a court of competent jurisdiction, the remaining portions shall be valid and binding upon the Parties.
- 3.10 Any notice provided for under this Agreement shall be sufficient if in writing and (1) delivered personally to the other party; (2) deposited in the U.S. Mail, postage prepaid, sent certified mail, return receipt requested; (3) sent overnight by commercial courier; or (4) sent by facsimile transmission, provided receipt of such facsimile is confirmed, in writing, on the first business day following the date of transmission. Notice shall be sent to the following address or to such other address as each Party may specify in writing:

IF TO THE CITY:

Gerald Moore, Chief of Police
City of Salem Police Department
555 Liberty Street SE, Room 130
Salem, OR 97301
Fax: (503) 589-2019

IF TO THE DISTRICT:

Allan Pollock, General Manager
Salem Area Mass Transit District
555 Court St NE, Suite 5230
Salem, OR 97301-3980
Fax: (503) 566-3933

Any notice delivered by personal delivery shall be deemed to be given upon actual receipt. Any notice sent by United States mail shall be deemed to be given five (5) days after mailing. Any notice sent by overnight courier shall be deemed to be given five (5) days after dispatch. Any notice sent by facsimile shall be deemed to be given when receipt of the transmission is generated by the transmitting machine. To be effective against either Party, such facsimile transmission shall be confirmed by telephone notice to the other Party.

IN WITNESS WHEREOF, the Parties have authorized this Agreement to be signed in their respective names by their duly authorized representative as of the dates set forth below.

CITY OF SALEM

SALEM AREA MASS TRANSIT DISTRICT

By: _____
Steve Powers, City Manager

By: _____
Allan Pollock, General Manager

Dated: _____

Dated: _____

**INTERGOVERNMENTAL AGREEMENT
BETWEEN
THE CITY OF SALEM AND
THE SALEM AREA MASS TRANSIT DISTRICT
FOR
POLICE SERVICES (FY201~~57~~-201~~68~~ and FY201~~68~~-201~~79~~)**

This INTERGOVERNMENTAL AGREEMENT (hereinafter referred to as the “Agreement”) is made by and between the SALEM AREA MASS TRANSIT DISTRICT, an Oregon special district, acting by and through its governing body (hereinafter referred to as the “District”), and the CITY OF SALEM, an Oregon municipal corporation, acting by and through its governing body (hereinafter referred to as the “City”), referred to collectively herein as the “Parties.”

RECITALS

- A.** This Agreement is authorized under ORS 190.010 *et seq.*; and
- B.** The Parties have a public interest in assuring adequate law enforcement in the vicinity of the transit bus mall located within City of Salem (hereinafter referred to as the “Downtown Transit Center”); and
- C.** This Agreement is for the purpose of providing coordinated police services for the Downtown Transit Center. The Downtown Transit Center, as used herein, includes the one square-block area bordered by High Street NE, Court Street NE, Church Street NE and Chemeketa Street NE in the downtown area of the City of Salem and includes all sidewalks within that block of the Downtown Transit Center located at 220 High Street NE.
- D.** The Parties find that the performance of this Agreement is in the best interest of both the City and the District and that this undertaking will benefit the public.

AGREEMENT

NOW THEREFORE, THE PARTES HEREBY AGREE AS FOLLOWS:

1. City Obligations

- 1.1 The City shall assign a minimum of one (1) sworn police officer on an on-call basis to respond directly to calls for police services at the Downtown Transit Center. “On-call” as used herein means the City shall provide the District with the ability to call a sworn officer assigned to the Downtown Enforcement Team directly should police services be necessary. Should officers from the Downtown Enforcement Team be unavailable, the City will ensure that the District has the phone number necessary to contact another on-duty Salem Police Officer directly. On-call status only applies to the hours and days specified in subsection 1.1.1 below.
 - 1.1.1 An assigned police officer shall be available to respond to the Downtown Transit Center on an on-call basis for a period of not less than forty five (45)

hours per week. The hours of on-call service will be from 1200 hrs to 2100 hrs Monday through Friday. The District will be provided with the phone number to the assigned officer for direct contact for police services at the Downtown Transit Center. The Parties understand that there may be times when an officer assigned to the Downtown Transit Center may not be available when, for example, responding to a critical police emergency.

1.1.2 The City will not be required to have an officer on-site at the Downtown Transit Center ~~during the contractual period specified in subsection 1.1.1.~~ The officer will be contacted via phone and should be within a distance to respond to the Downtown Transit Center in a timely fashion should police services be necessary.

1.1.3 Should the District need police services outside the contractual period specified in subsection 1.1.1, the District should call the non-emergency or emergency numbers to Willamette Valley Communications Center (WVCC) and report the incident.

1.2 It is the intent of the Parties that any police officer assigned to on-call status at the Downtown Transit Center shall be part of the Downtown Enforcement Team and that any assignment to the Downtown Enforcement Team is intended to be for a minimum of two (2) years in length, where reasonably possible, in order to provide continuity. It is in the sole discretion of the City to determine the duration of an officer's assignment to the Downtown Enforcement Team. The officers on the Downtown Enforcement Team shall act as back-up for the officer assigned to ~~on-~~ call status at the Downtown Transit Center and shall provide relief for said ~~on-~~ call officer during meal breaks. In the event the on-call officer is on a break or is otherwise not available, the City will provide the District with the phone number to reach another officer in the event police services become necessary.

1.3 Except for cases involving an internal affairs investigation or where otherwise prohibited by law, by Court order, or by order of the Marion County District Attorney pursuant to Oregon's Public Records Law, the City shall make its daily Downtown Transit Center assignment records and statistical data for calls for service relating to the Downtown Transit Center and any statistical data related to the officer(s) assigned to on-call status at the Downtown Transit Center pursuant to Subsection 1.1 of this Agreement available to the District for inspection upon no less than seventy-two (72) hours prior written notice and between the hours of 8:00 a.m. and 5:00 p.m. weekdays excluding holidays on which there is no transit service. Any specific report that is requested by the District must meet the Public Records law requirements relating to the release of reports. The District understands that it is not the custodian of any of the City's records described under this subsection, and it shall not release any such City records to any third party or entity for any reason whatsoever.

~~1.4 The City shall notify the District when it receives a complaint concerning the police services rendered by the City under this Agreement. For purposes of this notification, a complaint shall be defined as any action that triggers the City's~~

~~Citizen Complaint Process or results in an investigation. No further information about the complaint shall be released to the District unless an internal affairs investigation is completed and results in any disciplinary action.~~

~~4.51.4~~ Officers, upon being assigned to on-call status at the Downtown Transit Center, shall receive a briefing concerning the District's Police Ordinance 2000-1 as amended, Courthouse Square Police Ordinance 2004-01 as amended, Public Business Ordinance 2000-2, Non-Smoking Ordinance 2000-3 as amended, and diversity and customer services issues pertinent to District operations. Records of these briefings shall be maintained by the supervisor of the assigned officers, documenting the date of the briefing and who attended. Officers assigned to the Downtown Enforcement Team and those assigned to on-call status with the District will have access to the District's private security company, ~~G4S Security~~, as well as the databases associated with Downtown Transit Center activity.

2. District Obligations

2.1 The District shall pay to the City the sum of ~~\$118,167.00 (one hundred and eighteen thousand one hundred and sixty-seven dollars)~~ \$130,800.00 (one hundred and thirty thousand eight hundred dollars) for the fiscal year beginning July 1, 2017~~5~~, and ending June 30, 2018, and the sum of ~~\$125,870.00 (one hundred and twenty-five thousand eight hundred and seventy dollars)~~ \$134,200.00 (one hundred and thirty-four thousand two hundred dollars) for the fiscal year beginning July 1, 2018~~6~~, and ending June 30, 2019~~7~~ for services provided pursuant to this two (2) year Agreement.

2.2 The District shall make four (4) equal payments to the City for fiscal year 2017~~5~~-2018. These payments shall total the sum payable for that fiscal year as set forth in subsection 2.1 above. These payments shall be made quarterly on or before the fifteenth day following the **end** of each quarter of the fiscal year, e.g. on or before January 15, 2018, for the quarter commencing October 1, 2017, and ending December 31, 2018.

The District shall make four (4) equal payments to the City for fiscal year 2018~~6~~-2019. These payments shall total the sum payable for that fiscal year as set forth in subsection 2.1 above. These payments shall be made quarterly on or before the fifteenth day following the **end** of each quarter of the fiscal year, e.g. on or before January 15, 2019, for the quarter commencing October 1, 2018, and ending December 31, 2019.

2.3 The District shall designate one or more members of its staff as the liaison between the District and the City on transit security issues. The District shall acquire such security training for said designee(s) as may be necessary and shall provide the name(s) and contact phone numbers of said designee(s) to the City.

3. General Provisions

3.1 Term and Termination.

3.1.1 This Agreement shall be effective as of **July 1, 2015**~~7~~, and shall continue in effect through and including **June 30, 2017**~~9~~, unless earlier terminated as provided herein.

3.1.2 This Agreement may be terminated upon the mutual written consent of the Parties at any time.

3.1.3 Either Party to this Agreement may terminate this Agreement without cause at any time, upon not less than ninety (90) days' prior written notice to the other.

3.1.4 The District shall have the right to terminate this Agreement upon not less than thirty (30) days' prior written notice to the City in the event the District is dissatisfied with the police services supplied by the City, provided however, that the City has been given not less than thirty (30) days' advance written notice of the reasons for the District's dissatisfaction and the City has not cured same to the satisfaction of the District. If this Agreement is terminated by the District as set forth in this subsection, there shall be no refund of any quarterly payments made pursuant to Subsection 2.2 of this Agreement for the period prior to termination.

3.1.5 The City shall have the right to terminate this Agreement upon not less than thirty (30) days' prior written notice to the District in the event that the City is dissatisfied with the fulfillment of this Agreement by the District, provided however, that the District has been given not less than sixty (60) days' prior written notice of the reasons for the City's dissatisfaction and has not cured same to the satisfaction of the City.

3.2 Neither Party to this Agreement nor the officers, employees nor agents of either party are agents of the other. Each Party shall be separately and exclusively responsible for the acts, errors and omissions of its own officers, employees and agents. Nothing in this Agreement is intended to nor shall be construed to grant to the District any authority or responsibility to supervise, control, train, discipline or assign any police officer of the City. It is the limited purpose of this Agreement to provide assurance to the District that there will be an assigned police presence at the Downtown Transit Center and to assure the City that there will be funds available from the District to help defray the cost of that presence.

3.3 This Agreement shall be governed by the laws of the State of Oregon without regard to conflict of laws principles. Exclusive venue for litigation of any action arising under this Agreement shall be in the Circuit Court of the State of Oregon for Marion County. Each Party expressly waives any and all rights to maintain an action under this Agreement in any other venue, and expressly consents that, upon motion of the other party, any case may be dismissed or its venue transferred, as appropriate, so as to effectuate the choice of venue made in this section.

3.4 This Agreement sets forth the entire understanding between the Parties with respect to the subject matter hereof. All previous written and oral agreements, promises, representations, negotiations and course of dealings are hereby superseded and terminated. No evidence of any oral waiver or modification of this Agreement shall

be offered or considered in any proceeding to determine or enforce the provisions of this Agreement.

- 3.5 This Agreement may not be altered, modified, supplemented, or amended in any manner whatsoever except by mutual agreement of the Parties set forth in writing and executed with the same formalities as this Agreement.
- 3.6 The Parties agree to observe and comply with all applicable laws, ordinances, rules, regulations and executive orders of the federal, state and local government now existing or hereinafter in effect which may in any manner affect the performance of this Agreement. The following laws of the State of Oregon are hereby incorporated by reference into this Agreement: ORS 279B.220, 279B.230 and 279B.235.
- 3.7 Subject to the limitations established under the [Oregon Constitution and the Oregon Tort Claims Act](#), each Party to this Agreement agrees indemnify, defend, save and hold harmless the other and the other's officials, agents and employees against any and all claims, demands, causes of action, suits, proceedings, damages, costs, reasonable attorney's fees or liabilities including appeals (hereinafter "Claims") arising out of, pertaining to or in any way connected to any negligent, reckless or intentional act, error or omission by that Party in the performance of any provision of this Agreement. Each Party shall give to the other notice in writing of any such Claims within twenty (20) days of the date that Party receives notice of any such Claims. Neither Party shall settle, compromise or take any action that may be prejudicial to the other Party's defense of or interest in such Claims without the express written consent of the other Party.
- 3.8 The Parties further agree that each shall obtain and maintain in full force at all times during the term of this Agreement, a policy of general liability insurance with liability limits of at least **\$2,000,000.00** (two million dollars) [per occurrence](#), which names the other Party, its officers, agents, and employees as additional insured parties. The City, as a government body, may fulfill this insurance obligation through a program of self-insurance, provided that the self-insurance program complies with all applicable laws and provides insurance coverage equivalent to both type and level of coverage to that listed in this subsection.
- 3.9 In the event any term or provision of this Agreement shall be held to be invalid and unenforceable by a court of competent jurisdiction, the remaining portions shall be valid and binding upon the Parties.

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3.10 Any notice provided for under this Agreement shall be sufficient if in writing and (1) delivered personally to the other party; (2) deposited in the U.S. Mail, postage prepaid, sent certified mail, return receipt requested; (3) sent overnight by commercial courier; or (4) sent by facsimile transmission, provided receipt of such facsimile is confirmed, in writing, on the first business day following the date of transmission. Notice shall be sent to the following address or to such other address as each Party may specify in writing:

IF TO THE CITY:

Gerald Moore, Chief of Police
City of Salem Police Department
555 Liberty Street SE, Room 130
Salem, OR 97301
Fax: (503) 589-2019

IF TO THE DISTRICT:

Allan Pollock, General Manager
Salem Area Mass Transit District
555 Court St NE, Suite 5230
Salem, OR 97301-3980
Fax: (503) 566-3933

Any notice delivered by personal delivery shall be deemed to be given upon actual receipt. Any notice sent by United States mail shall be deemed to be given five (5) days after mailing. Any notice sent by overnight courier shall be deemed to be given five (5) days after dispatch. Any notice sent by facsimile shall be deemed to be given when receipt of the transmission is generated by the transmitting machine. To be effective against either Party, such facsimile transmission shall be confirmed by telephone notice to the other Party.

IN WITNESS WHEREOF, the Parties have authorized this Agreement to be signed in their respective names by their duly authorized representative as of the dates set forth below.

CITY OF SALEM

**SALEM AREA MASS TRANSIT
DISTRICT**

By: _____

By: _____

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| ~~Steve Powers~~~~Kacey Duncan, Interim~~ City Manager _____ Allan Pollock, General
Manager

Dated: _____ Dated: _____

MEMO TO: BOARD OF DIRECTORS
FROM: GREGG THOMPSON, MAINTENANCE MANAGER
THRU: ALLAN POLLOCK, GENERAL MANAGER
SUBJECT: CHERRIOTS LIFT VEHICLE ACQUISITION

Issue

Shall the Board authorize the General Manager to execute a contract with Creative Bus Sales for the purchase of five (5) ADA Paratransit replacement transit vehicles for Cherrlots LIFT service for a not-to-exceed amount of \$634,644?

Background and findings

SAMTD's current fleet for delivery of Cherrlots LIFT service consists of 43 lift-equipped vehicles. Regular replacement of these vehicles is necessary to ensure safe, efficient delivery of this service. As part of the District's overall Capital Planning efforts, SAMTD staff is committed to ensure our vehicles are replaced at a schedule consistent with industry best practices. The five vehicles to be replaced have exceeded Useful Life Benchmarks of five (5) years, 150,000 miles. The vehicles to be replaced are at nine (9) years of age with an average of over 196,500 miles each.

The contract price is based upon a State of Oregon Price Agreement, procured under procedures set by the Oregon Department of Transportation's Public Transit Division. In accordance with these procedures, SAMTD staff issued a formal, competitive Invitation to Bid for medium-size Category C vehicles and propose awarding the contract to Creative Bus Sales as the lowest responsive bidder.

Financial Impact

Funding for the proposed contract is covered through a Federal Transit Administration (FTA) 5309 grant (\$427,435), Oregon State Special Transportation funds (\$154,710), and Insurance Settlement Funds (\$52,499).

Recommendation

Staff recommends the Board authorize the General Manager to execute a contract with Creative Bus Sales for the purchase of five (5) ADA Paratransit replacement transit vehicles for Cherrlots LIFT service for a not-to-exceed amount of \$634,644.

Proposed Motion

I move the Board authorize the General Manager to execute a contract with Creative Bus Sales for the purchase of five (5) ADA Paratransit replacement transit vehicles for Cherrlots LIFT service for a not-to-exceed amount of \$634,644.

or

I move that the Board adopt the staff recommendation.

MEMO TO: BOARD OF DIRECTORS
FROM: GREGG THOMPSON, MAINTENANCE MANAGER
THRU: ALLAN POLLOCK, GENERAL MANAGER
SUBJECT: CHERRIOTS REGIONAL VEHICLE ACQUISITION

Issue

Shall the Board authorize the General Manager to execute a contract with Western Bus Sales for the purchase of three (3) medium heavy duty replacement transit buses for Cherrlots Regional service for a not-to-exceed amount of \$647,208?

Background and Findings

SAMTD's current fleet for delivery of Cherrlots Regional service consists of 15 lift-equipped vehicles. Regular replacement of these vehicles is necessary to ensure safe, efficient delivery of this service. As part of the District's overall Capital Planning efforts, SAMTD staff is committed to ensure its vehicles are replaced at a schedule consistent with industry best practices. The three vehicles to be replaced have exceeded Useful Life Benchmarks of 10 years, 350,000 miles. The vehicles to be replaced are at 13 years of age, with an average of over 395,750 miles each.

The contract price is based upon a State of Oregon Price Agreement, procured under procedures set by the Oregon Department of Transportation's Public Transit Division. In accordance with these procedures, SAMTD staff issued a formal, competitive Invitation to Bid for medium-heavy Category B vehicles and proposes awarding the contract to Western Bus Sales.

Financial Impact

Funding for the proposed contract is provided through an ODOT 5310 Grant (\$447,589), an ODOT 5339 Grant (\$209,523), and Oregon State Special Transportation funds (\$94,142).

Recommendation

Staff recommends the board authorize the General Manager to execute a contract with Western Bus Sales for the purchase of three (3) medium heavy duty replacement transit buses for Cherrlots Regional service for a not-to-exceed amount of \$647,208.

Proposed Motion

I move the Board authorize the General Manager to execute a contract with Western Bus Sales for the purchase of three (3) medium heavy duty replacement transit buses for Cherrlots Regional service for a not-to-exceed amount of \$647,208.

or

I move that the board adopt the staff recommendation.

MEMO TO: BOARD OF DIRECTORS

**FROM: TED STONECLIFFE, TRANSIT PLANNER II, PROGRAMS
STEVE DICKEY, DIRECTOR OF TRANSPORTATION DEVELOPMENT**

THRU: ALLAN POLLOCK, GENERAL MANAGER

SUBJECT: ADOPTION OF RESOLUTION #2017-04 WHICH RESCINDS AND REPLACES SAMTD BOARD POLICY #104 "LANGUAGE ASSISTANCE" AND RESOLUTION #2017-05 WHICH RESCINDS AND REPLACES SAMTD BOARD POLICY #108 "PUBLIC PARTICIPATION PROCESS FOR PROPOSED FARE INCREASES AND/OR TRANSIT SERVICE REDUCTIONS"

Issue

Shall the Board adopt Resolution #2017-04 to rescind and replace Policy #104 "Language Assistance" in accordance with the guidelines set forth that will provide language assistance to people with limited English proficiency? Additionally, shall the Board adopt Resolution #2017-05 to rescind and replace Policy #108 "Public Participation Process for Proposed Fare Increases and/or Transit Service Reductions" to conduct a public participation process in the event of any increase in fares or transit service reductions?

Background and Findings

Title VI of the Civil Rights Act protects people from discrimination based on race, color, and national origin. The Salem Area Mass Transit District (SAMTD) Title VI Program was last submitted to FTA on May 31, 2014 and must be submitted with updated policies by May 31, 2017. Two policies that are a part of the program are Board policies #104 "Language Assistance" and #108 "Public Participation Process for Proposed Fare Increases and/or Transit Service Reductions."

Due to the newly updated demographic data obtained from the U.S. Census American Community Survey (ACS), some population statistics have changed since 2014 when the Title VI Program was last updated. As a result, Policy #104 must be revised to reflect the new data. Moreover, with changes to the Major Service Change policy adopted by the District, Policy #108 must be modified as well. Staff have drafted two Board Resolutions (#2017-04 and #2017-05) to allow the Board to adopt the revisions to these policies. The revised policy and Resolution for Policy #104 are provided in **Attachment A**, and the revised policy and Resolution for Policy #108 provided in **Attachment B**. The revisions update the following information:

- Demographic data from the 2008-12 American Community Survey (U.S. Census) to 2011-15 data
- Updating the foreign languages included in SAMTD Title VI notifications to Spanish and Russian since ACS data shows populations of five percent or 1,000 individuals as not speaking English “very well” for both of these language groups in Marion and Polk Counties
- The thresholds that define a “Major Service Change” and the definition used for “low-income” populations are adjusted per community feedback

Redline (“tracked changes”) copies of the two policies are provided in **Attachment C**. The redline documents show the changes from the previous versions of the policies.

Financial Impacts

None.

Recommendation No. 1

Staff recommends the Board adopt Resolution #2017-04 to rescind and replace Policy #104 “Language Assistance” in accordance with the guidelines set forth that will provide language assistance to people with limited English proficiency.

Recommendation No. 2

Staff recommends the Board adopt Resolution #2017-05 to rescind and replace Policy #108 “Public Participation Process for Proposed Fare Increases and/or Transit Service Reductions” to conduct a public participation process in the event of any increase in fares or transit service reductions.

Proposed Motion No. 1

I move the Board adopt Resolution #2017-04 to rescind and replace Policy #104 “Language Assistance” in accordance with the guidelines set forth that will provide language assistance to people with limited English proficiency.

Proposed Motion No. 2

I move the Board adopt Resolution #2017-05 to rescind and replace Policy #108 “Public Participation Process for Proposed Fare Increases and/or Transit Service Reductions” to conduct a public participation process in the event of any increase in fares or transit service reductions.

or

I move that the board adopt staff recommendations

**RESOLUTION # 2017-04
RESCIND AND REPLACE POLICY # 104 "LANGUAGE ASSISTANCE"**

WHEREAS, the Salem Area Mass Transit District, hereafter referred to as "District," did on July 23, 2003 establish its Language Assistance Policy #104 as required under Federal regulations to provide assistance to members of the public with limited English language skills; and,

WHEREAS, the Federal Transit Administration (FTA) Safe Harbor Provision stipulates that the District must consider all demographic groups that constitute five percent or 1,000 persons, whichever is less, of the total population of limited English proficient persons eligible to be served or likely to be affected or encountered when providing written translation of vital documents; and,

WHEREAS, the demographic data from the U.S. Census was updated in the 2017 Title VI Program approved by the Board of Directors on May 25, 2017 and the data shows that a population of Russian language speakers exists over the Safe Harbor threshold; and,

WHEREAS, the District must address the Spanish and Russian populations who speak limited English with additional language assistance including the publication of the Title VI Notice to the Public in these languages; and,

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

THAT, Resolution #2017-04 is adopted to rescind and replace Policy #104 "Language Assistance" in accordance with the guidelines set forth that will provide language assistance to people with limited English proficiency.

ADOPTED by the Board of Directors on the 25th day of May, 2017, and effective thereupon.

ATTEST:

Secretary
SAMTD Board of Directors

President
SAMTD Board of Directors

SALEM-KEIZER TRANSIT

GENERAL ADMINISTRATIVE MANUAL

Policy:	LANGUAGE ASSISTANCE	Number: 104
Approved by motion of the SAMTD Board of Directors on 07/24/03; rescinded and replaced by Resolution #2017-04 adopted on 05-25-17.	Effective Date: 05/25/17	Page 1 of 5

104.01 PURPOSE

To set clear guidelines that ensure maximum access to information about Cherriot's services and to remove barriers that may result from language differences.

104.02 APPLICATION

All matters related to guide how District Officers and staff provide language assistance as is required by Federal regulations contained in 49 USC §5307 (c)(1)(i), Title VI of the Civil Rights Act of 1964, 42 USC §2000d et seq, Federal Transit Laws, 49 USC 53, 49 CFR §1.51, and 49 CFR part 21. See FTA circular 4702.1B dated October 1, 2012 for details.

104.03 GUIDELINES

A. Language Assistance Determinations

1. The District shall, as part of its Title VI Program update process (every three years), review minority population percentages within Marion and Polk Counties, as well as percentage of minority ridership on Cherriot's local fixed route and regional express buses.
2. If, in the process of such reviews, a specific non-English-speaking minority population exceeds five percent (5%) or 1,000 individuals, whichever is less, of the total Marion and Polk County population, or five percent (5%) or 1,000 individuals, whichever is less, of total system ridership, staff shall prepare a report to the Board denoting this information and defining a language assistance plan that evaluates the need for translation and communication improvements, and describes a program to address that need.
3. The Federal Transit Administration's (FTA) Safe Harbor Provision stipulates that, "if a recipient provides written translation of vital documents for each eligible LEP language group that constitutes five percent (5%) or 1,000 persons, whichever is less, of the total population of persons eligible to be served or likely to be affected or

SALEM-KEIZER TRANSIT

GENERAL ADMINISTRATIVE MANUAL

Policy:	LANGUAGE ASSISTANCE	Number: 104
Approved by motion of the SAMTD Board of Directors on 07/24/03; rescinded and replaced by Resolution #2017-04 adopted on 05-25-17.	Effective Date: 05/25/17	Page 2 of 5

encountered, then such action will be considered strong evidence of compliance with the recipient’s written translation obligations.”

4. SAMTD will address the Spanish and Russian populations with additional language assistance that will include the publication of the Title VI Notice to the Public in these languages.
 - a. At present, the Spanish and Russian-speaking communities are the only populations exceeding the five percent or 1,000 individuals threshold noted above.
 - b. A biannual rider survey is one way to inform the District of the riders’ ability to speak English.

B. Contact List

1. The District shall develop and maintain Spanish and Russian language contact lists, including the primary Spanish and Russian language print and airwave media and community organizations that serve Hispanic / Latino and Russian persons within Marion and Polk Counties.

C. Marketing Programs

1. Marketing materials that are educational or informative in nature shall be prepared and made available in Spanish. Cherriots Regional marketing materials shall be made in English, Spanish and Russian languages. Examples of this type of material include system maps, route schedules, flyers, email newsletters, and service advisories.
2. Marketing materials that simply present a slogan or a graphic image, and do not have any informative content, do not as a matter of policy need to be duplicated in Spanish or Russian languages. The standard to determine if a translation is needed will be based upon whether or not the information presented in the marketing piece is necessary to understand how to use the Cherriots system, or to take advantage of opportunities presented by the system.
 - a. Marketing pieces not required to be produced in Spanish or

SALEM-KEIZER TRANSIT

GENERAL ADMINISTRATIVE MANUAL

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Russian language versions include simple posters, exterior bus ads, bus passes, collateral items such as pass holders or key chains, or schedule information which is limited to times and street names.

- b. Ads produced for cable TV marketing are not required to be prepared in Spanish or Russian language versions. However, for programs that offer benefits to riders, cable TV spots shall contain a tag line or graphic, in Spanish and Russian, which tells where to find Spanish and Russian language information about the program and its benefits.

- 3. When the District chooses to prepare specific Spanish or Russian language marketing programs, nothing in these policies will be interpreted to limit the media used to reach the Spanish and Russian-speaking audiences.

D. Planning Activities

The District’s planning activities include route and schedule analysis, system evaluation, ridership studies and analysis, and strategic planning. On occasion, public forums or hearings are conducted to invite input on these kinds of topics from persons in the District area.

- 1. Legal notices and public hearing or forum notices on such planning meetings, and any news releases on such topics, will be distributed to Spanish and Russian language media on the required contact list.
- 2. The District should provide English-Spanish and/or English-Russian interpreters, if staff is available, for public planning meetings and forums. An interpreter shall be made available for all legally-required public hearings.
- 3. Notice will be provided to media on the District’s Spanish and Russian language contact lists of all federally required planning activities which require public input.

SALEM-KEIZER TRANSIT

GENERAL ADMINISTRATIVE MANUAL

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E. Administrative Functions

In the conduct of the District’s responsibilities, there are a number of statutory and administrative functions that require effective communications with the residents of Marion and Polk Counties. Such communications must be accessible to Spanish and Russian speaking persons.

1. District regulations and public codes of conduct shall be prepared and made available in Spanish and Russian language versions. Additionally, any legal notice that is distributed and is of interest to the general population shall be sent to the Spanish and Russian language media contact lists.
2. All District job announcements, invitations for bid, and requests for proposal shall be distributed to the Spanish and Russian language media contacts. Board meeting announcements and agendas will also be sent to Spanish and Russian language media contacts.
3. Board meeting agendas shall include written instructions in Spanish and Russian on meeting procedures and how to provide public comment at Board meetings and hearings.
4. An English-Spanish and/or English-Russian interpreter(s) shall be made available at all publicly-noticed District Board meetings.
5. The District’s web page shall include information in Spanish and Russian. A Spanish link shall include material on fares and riding regulations, how to use the Cherriots system, facilities and services available to Cherriots riders, and how to access more detailed information in Spanish and Russian.

F. Assistance in Other Languages

The District is aware that there are a number of languages spoken within the area, including other Indo-European tongues, Chinese, Vietnamese, and other Asian and Pacific Island languages. An analysis of the 2011-15

SALEM-KEIZER TRANSIT

GENERAL ADMINISTRATIVE MANUAL

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American Community Survey five year estimate (U.S. Census) data indicates that the Hispanic population represents 25 percent of Marion and Polk County residents. Seven percent (29,600 individuals) of the Limited English Proficient (LEP) population speaks Spanish and 0.4 percent (1,800 individuals) speak Russian. All other LEP persons total 1.1 percent of Marion and Polk Counties population.

1. In its customer service functions, the District will retain telephonic language assistance services from a professional translating service, to provide customer service and information in multiple languages.
2. The District may choose to target information or marketing materials to selected minority groups in the area, in languages other than English, Spanish, and Russian.

Adopted by:

Date:

President, SAMTD Board of Directors

RESOLUTION # 2017-05

REVISED POLICY # 108 "PUBLIC PARTICIPATION PROCESS FOR PROPOSED FARE INCREASES AND/OR TRANSIT SERVICE REDUCTIONS"

WHEREAS, the Salem Area Mass Transit District, hereafter referred to as "District," is required under Federal Transit Administration Rules and Regulations contained in 49 USC §5307 (c)(1)(I) to conduct a prescribed public participation process in the event of certain increases to transit fares or reduction of transit services; and,

WHEREAS, Federal regulations define what a fare increase and service reduction is, and the minimum circumstances under which public notification and public hearings are required; and,

WHEREAS, on March 26, 1998, the SAMTD Board adopted Resolution 98-05 Establishing Policy and Procedures for a Public Participation Process Related to Proposed Fare and/or Transit Service Changes; and, on October 24, 2013, the Board adopted the rescinding Resolution #2013-11 to Re-establish a Policy and Procedure for Public Participation Process for Proposed Fare Increases and/or Transit Service Reductions; and Policy #107 was created and later renumbered to Policy #108 with the adoption of Resolution #2014-05 on May 22, 2014; and

WHEREAS, the District's Title VI Program and associated policies define a Fare Change and Major Service Changes, and the minimum circumstances under which Disparate Impact and Disproportionate Burden Analyses are required; and,

WHEREAS, the District has occasion to effect increases to its fares and/or reduction in transit services to carry out its mission; and,

WHEREAS, the District wishes to ensure that the public has ample opportunity to participate in the increase of transit fares and in the planning and implementation of Major Service reductions, consistent with Federal regulations; and,

WHEREAS, the District wishes to ensure that people living under 150 percent of the Federal Poverty Level (FPL) do not bare any more burden of an increase in fares or in the event of a Major Service Change than those above 150 percent of FPL;

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

THAT, the Board will adopt Resolution #2017-05 to rescind and replace Policy #108 to conduct a public participation process in the event of any increase in fares or transit service reductions.

ADOPTED by the Board of Directors on the 25th day of May, 2017, and effective thereupon.

ATTEST:

President
SAMTD Board of Directors

Secretary
Board of Directors

SALEM-KEIZER TRANSIT

GENERAL ADMINISTRATIVE MANUAL

Policy: PUBLIC PARTICIPATION PROCESS FOR PROPOSED FARE INCREASES AND/OR TRANSIT SERVICE REDUCTIONS		Number: 108
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108.01 PURPOSE

This policy should apply to the institution of proposed reduction in transit services or increase in fares.

108.02 APPLICATION

All matters related to guide the management of reductions in transit service and increases in fares as is required by Federal regulations contained in 49 USC §5307 (c)(1)(i).

108.03 DEFINITIONS

Service Reduction:

1. A reduction in service defined by Policy #707 "Major Service Change" of:
 - a. 15 percent or more of the number of transit route miles based on the miles of an average round-trip of the route (this includes routing changes where route miles are neither increased nor reduced (i.e., re-routes), or;
 - b. 15 percent or more of a route's frequency of the service (defined as the average hourly frequency throughout one service day for local fixed routes and as daily round trips for regional express routes) on a daily basis for the day of the week for which a change is made or;
 - c. 15 percent in the span (hours) of a route's revenue service (defined as the time between the first served stop of the day and the last stop), on a daily basis for the day of the week for which a change is made;
 - d. A transit route split where either of the new routes meet any of the above thresholds when compared to the corresponding piece of the former route.
 - e. A Major Service Change occurs whether the above thresholds are met:
 1. Within a single service proposal, or;
 2. Due to a cumulative effect of routing, frequency, or span changes over the year prior to the analysis.

SALEM-KEIZER TRANSIT

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Resolution #98-05 adopted by the SAMTD Board of Directors on 03/26/98; rescinded by Resolution #13-11 on 10/24/13; rescinded/replaced by Resolution #2017-05 adopted on 05-25-17.	Effective Date: 05/25/17
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Fare Increase:

An increase in any cash fare or in the cost of any passes, tickets, transfers, or other means by which transit riders pay for their trips.

108.04 GENERAL RULE

A. Public Hearing Requirements

SAMTD shall hold a public hearing when any Major Service Change proposed results in a decrease in service; or for any proposed increase in fares.

1. Notice must be published in a general circulation newspaper.
2. Notices will be placed in newspapers, publications, or websites that are oriented to specific groups or neighborhoods that may be affected by the proposed Major Service Change.
 - a. The notice must be published at least 30 days prior to the hearing.
 - b. The notice must contain a description of the proposed service reduction, and the date, time, and place of the hearing.

B. Implementation of Changes

No transit service reduction or fare increase shall be instituted until after:

1. A public hearing is held;
2. Consideration is given to views and comments expressed in the hearing; and to the effect on minority populations of the proposed service reduction.
3. A Disparate Impact Analysis is completed for all Major Service Changes and is presented to the SAMTD Board for its consideration and included in the subsequent SAMTD Title VI Program report with a record of action taken by the Board.
 - a. All changes in service that meet the definition of "Major Service Change" are subject to a Disparate Impact Analysis prior to Board approval of the service change.

SALEM-KEIZER TRANSIT

GENERAL ADMINISTRATIVE MANUAL

Policy: PUBLIC PARTICIPATION PROCESS FOR PROPOSED FARE INCREASES AND/OR TRANSIT SERVICE REDUCTIONS	Number: 108
Resolution #98-05 adopted by the SAMTD Board of Directors on 03/26/98; rescinded by Resolution #13-11 on 10/24/13; rescinded/replaced by Resolution #2017-05 adopted on 05-25-17.	Effective Date: 05/25/17
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108.05 EXCEPTIONS

There may be exceptions to the above policies for seasonal variations in service, in emergency situations, or for experimental reduction of service or increases in fares. Any exception made by the District shall be guided by the Federal regulations contained in 49 USC §5307 (c)(1)(i).

Adopted by:

Date:

President, SAMTD Board of Directors

SALEM AREA TRANSIT/SALEM-KEIZER TRANSIT
ADMINISTRATIVE MANUAL

GENERAL

Policy: <u>LANGUAGE ASSISTANCE POLICY</u>		Number: _____ <u>104</u>
Adopted by the Board of Directors Approved by motion of the SAMTD Board of Directors on 07/24/03; rescinded and replaced by Resolution #2017-04 adopted on 05-25-17.	Effective Date: <u>7/24/03 05/25/17</u>	Page: 1 of <u>35</u>

104.01 INTRODUCTION

~~The District Board of Directors wishes to establish a policy that will maximize access to information about Cherriots, and remove barriers to the use of Cherriot services that may result from language differences.~~

~~Policies should be consistent with Federal Transit Administration Title VI regulations that require a description of the methods used to inform minority communities of service changes relating to transit service improvements.~~

104.01 PURPOSE

~~To set clear guidelines that ensure maximum access to information about Cherriots' services and to remove barriers that may result from language differences.~~

104.02 APPLICATION

~~All matters related to guide how District Officers and staff provide language assistance as is required by Federal regulations contained in 49 USC §5307 (c)(1)(i), Title VI of the Civil Rights Act of 1964, 42 USC §2000d et seq, Federal Transit Laws, 49 USC 53, 49 CFR §1.51, and 49 CFR part 21. See FTA circular 4702.1B dated October 1, 2012 for details.~~

104.0203 GENERAL POLICY REQUIREMENTS GUIDELINES

A. Language Assistance Determinations

1. The District shall, ~~as part of its Title VI Program update process (every three years), as part of its Title VI certification and review process, periodically~~ review minority population percentages within ~~Marion and Polk Counties, the District area,~~ as well as percentage of minority ridership on Cherriots ~~local fixed route and regional express~~ buses.

2. If, in the process of such reviews, a specific non-English-speaking minority population exceeds ~~5% five percent or 1,000 individuals, whichever is less, of the total Marion and Polk County population, of the total District population, or 5% five percent or 1,000 individuals, whichever is less,~~ of ~~transit total system~~ ridership, staff shall prepare a report to the Board denoting this information and defining a language assistance plan that evaluates the need for translation and communication improvements, and describes a program to address that need.

3. ~~The Federal Transit Administration's (FTA) Safe Harbor Provision stipulates that, "if a recipient provides written translation of vital documents for each eligible LEP language group that constitutes five percent (5%) or 1,000 persons, whichever is less, of the total population of persons eligible to be served or likely to be affected or encountered, then such action will be considered strong evidence of compliance with the recipient's written translation obligations."~~

4. ~~SAMTD will address the Spanish and Russian populations with additional language assistance that will include the publication of the Title VI Notice to the Public in these languages.~~
 - a. ~~At present, the Spanish and Russian-speaking communities are the only populations exceeding the five percent or 1,000 individuals threshold noted above.~~
 - a.b. ~~A biannual rider survey is one way to inform the District of the riders' ability to speak English.~~

3. ~~Hispanic community is the only population exceeding the 5% threshold noted in the above policy, and the policies that are defined below apply specifically to the Spanish language. These policies will be updated in the future to include other languages as necessary.~~

B. Contact List

1. The District shall develop and maintain Spanish and Russian language a Spanish-language contact lists, including the primary Spanish and Russian language print and airwave media and community organizations that serve Hispanic / Latino and Russian persons within the District area Marion and Polk Counties.

C. Marketing Programs

1. Marketing materials that are educational or informative in nature shall be prepared and made available in the Spanish language. Cherriots Regional marketing materials shall be made in English, Spanish and Russian languages. Examples of this type of material include system maps, route schedules, ride guides, flyers, email newsletters, and service advisories rider alerts.

2. Marketing materials that simply present a slogan or a graphic image, and do not have any informative content, do not as a matter of policy need to be duplicated in the Spanish or Russian languages. The standard to determine if a translation is needed should will be based upon whether or not the information presented in the marketing piece is necessary to understand how to use the Cherriot system or to take advantage of opportunities presented by the system.

- a. Marketing pieces not required to be which would not normally be produced in a Spanish or Russian language versions might include some simple posters, exterior bus ads, bus passes, collateral items such as pass holders or key chains, or schedule information which is limited to times and street names.

- b. Ads produced for cable TV marketing are not required to be prepared in Spanish or Russian- language versions. However, for programs that offer benefits to riders, cable TV spots shall contain a tag line or graphic, in Spanish and Russian, which tells where to find Spanish- and Russian language information about the program and its benefits.

~~2.3.~~ ~~If-When~~ the District chooses to prepare specific Spanish or Russian- language marketing programs, nothing in these policies ~~should will~~ be interpreted to limit the media ~~that may be~~ used to reach the Hispanic Spanish and Russian-speaking audiences.

D. Planning Activities

The District's planning activities include route and schedule analysis, system evaluation, ridership studies and analysis, and strategic planning. On occasion, public forums or hearings are conducted to invite input on these kinds of topics from persons in the District area.

1. Legal notices and public hearing or forum notices on such planning meetings, and any news releases on such topics, will be distributed to Spanish and Russian- language media on the required contact list.
2. The District should provide ~~an~~ English-Spanish and/or English-Russian interpreters, if staff is available, for public planning meetings and forums. An interpreter shall be made available for all legally-required public hearings.
3. Notice will be provided to media on the District's Spanish and Russian- language contact lists of all federally-required planning activities which require public input.

E. Administrative Functions

In the conduct of the District's responsibilities, there are a number of statutory and administrative functions that require effective communications with the residents of ~~the District~~ Marion and Polk Counties. Such communications must be accessible to Spanish and Russian- speaking persons.

1. District regulations and public codes of conduct shall be prepared and made available in Spanish and Russian- language versions. Additionally, any legal notice that is distributed and is of interest to the general

population shall be sent to the Spanish and Russian language media contact lists.

2. All District job announcements, invitations for bid, and requests for proposal shall be distributed to the Spanish and Russian-language media contacts. Board meeting announcements and agendas will also be sent to Spanish and Russian- language media contacts.

~~2.3.~~ Additionally, Board meeting agendas shall include written instructions in Spanish and Russian on meeting procedures and how to provide public comment at Board meetings and hearings.

~~3.4.~~ An English-Spanish and/or English-Russian interpreter(s) ~~should~~ shall be made available at all publicly-noticed District Board meetings.

~~4.5.~~ The District's web page shall include information in Spanish and Russian. A Spanish link shall include material on fares and riding regulations, how to use the Cherriots system, facilities and services available to Cherriots riders, and how to access more detailed information in ~~the~~ Spanish language and Russian.

F. Assistance in other languages

The District is aware that there are a number of languages spoken within the area, including ~~Russian and~~ other indo-European tongues, Chinese, Vietnamese, and other Asian and Pacific Island languages. An analysis of ~~the 2000 Census data indicates that the Hispanic population represents 14% of District residents, and all other non-English speaking minorities total less than 3%. the 2011-15 American Community Survey five year estimate (U.S. Census) data indicates that the Hispanic population represents 25 percent of Marion and Polk County residents. Seven percent (29,600 individuals) of the Limited English Proficient (LEP) population speaks Spanish and 0.4 percent (1,800 individuals) speak Russian. All other LEP persons total 1.1 percent of the Marion and Polk Counties population.~~

1. In its customer service functions, the District will retain telephonic language assistance services from a professional translating service, to provide customer service and information in multiple languages.
2. The District may choose to target information or marketing materials to selected minority groups in the area, in languages other than English, ~~or Spanish, and Russian. However, no other non-English-speaking minority populations exceed the 5% threshold noted in these policies at the current time.~~

Adopted By:

President
Board of Directors

~~July 24, 2003~~
Date

Policy:	PUBLIC PARTICIPATION PROCESS FOR PROPOSED FARE INCREASES AND/OR TRANSIT SERVICE REDUCTIONS	Number: 108
Resolution #98-05 adopted by the SAMTD Board of Directors on 03/26/98; rescinded by Resolution #13-11 on 10/24/13; rescinded/replaced by Resolution #2017-05 adopted on 05-25-17. Adopted by the SAMTD Board of Directors on 10/24/2013 by Resolution #13-11;	Effective Date: 05/2225/20142017	Page 1 of 3

108 INTRODUCTION

~~The Salem Area Mass Transit District Board of Directors wishes to establish Policy and Procedures for the Public Participation Process~~

108.01 PURPOSE

~~This policy should apply to the institution of proposed reduction in transit services or increase in fares.~~

108.02 APPLICATION

~~All matters related to guide the management of reductions in transit service and increases in fares as is required by Federal regulations contained in 49 USC §5307 (c)(1)(i).~~

108.01 APPLICATION

~~All matters related to guide the management of reductions in transit service and increases in fares as is required by Federal regulations contained in 49 USC §5307 (c)(1)(i).~~

108.02 PURPOSE

~~This policy should apply to the institution of proposed reduction in transit services or increase in fares.~~

108.03 DEFINITIONS

Service Reduction

1. A reduction in service defined by Policy #707 "Major Service Change" of:

- a. 15 percent or more of the number of transit route miles based on the miles of an average round-trip of the route (this includes routing changes where route miles are neither increased nor reduced (i.e., re-routes)), or;
- b. 15 percent or more of a route's frequency of the service (defined as the average hourly frequency throughout one service day for local fixed routes and as daily round trips for regional express routes) on a daily basis for the day of the week for which a change is made or;

- c. 15 percent in the span (hours) of a route's revenue service (defined as the time between the first served stop of the day and the last stop), on a daily basis for the day of the week for which a change is made;
- d. A transit route split where either of the new routes meet any of the above thresholds when compared to the corresponding piece of the former route.

- e. A Major Service Change occurs whether the above thresholds are met:
 - 1. Within a single service proposal, or;

 - 2. Due to a cumulative effect of routing, frequency, or span changes over the year prior to the analysis.

~~Service Reduction: A decrease of service in a route which affects 25% or more of the number of transit route miles; 25% or more of the number of transit vehicle revenue miles, computed on a daily basis for the day of the week on which the change is made; 25% or more of the ridership on the route, computed on a daily basis for the day of the week for which the change is made, shall be considered a service reduction.~~

~~If a number of smaller reductions are made on a route during any fiscal year, and the total of the reductions meet or exceed the percentages shown above, then the reductions which result in exceeding the 25% threshold shall be subject to a public hearing.~~

~~Fare Change: Increase:~~ **Fare Increase**

~~A fare increase is made when there is an increase in any cash fare or in the cost of any passes, tickets, transfers, or other means by which transit riders pay for their trips.~~

108.04 GENERAL RULES

~~Public Hearing Requirements:~~ **A. Public Hearing Requirements:**

~~SAMTD shall hold a public hearing will be scheduled when any Major Service Change proposed that results in a decrease in service or for any proposed increase in fares.~~

- 1. Notice must be published in a general circulation newspaper.

2. Notices will be placed in newspapers, publications, or websites that are oriented to specific groups or neighborhoods that may be affected by the proposed Major Service Change.
 - a. The notice must be published at least 30 days prior to the hearing.
 - b. The notice must contain a description of the proposed service reduction, and the date, time, and place of the hearing. ~~a reduction in transit service or fare increase as defined above are proposed by the District. Notice must be published in a general circulation newspaper. In addition, notice will be placed in newspapers, publications, or internet sites that are oriented to specific groups or neighborhoods that may be affected by the proposed service reduction or fare increase. The notice must contain a description of the proposed service reduction or fare increase, and the date, time, and place of the hearing.~~

~~Implementation of Changes:~~ **Implementation of Changes:**

No transit service reduction or fare increase shall be instituted until after:

1. A public hearing is held;
2. Consideration is given to views and comments expressed in the hearing; and to the effect on ~~energy conservation, and the economic, environmental, and social impact~~ minority populations of the proposed service reduction.
3. A Disparate Impact Analysis is completed for all Major Service Changes and is presented to the SAMTD Board for its consideration and included in the subsequent SAMTD Title VI Program report with a record of action taken by the Board. ~~of the proposed change in transit service or fare.~~
 - a. All changes in service that meet the definition of "Major Service Change" are subject to a Disparate Impact Analysis prior to Board approval of the service change.

108.05 EXCEPTIONS

There may be exceptions to the above policies for seasonal variations in service, in emergency situations, or for experimental reduction of service or increases in fares. Any exception made by the District shall be guided by the Federal regulations contained in 49 USC§5307 (c)(1)(i).

Adopted by: _____ **Date:** _____

President, SAMTD Board of Directors

Approved by:



Date:

5/29/14

President
SAMTD Board of Directors

MEMO TO: BOARD OF DIRECTORS

**FROM: TED STONECLIFFE, TRANSIT PLANNER II, PROGRAMS
STEVE DICKEY, DIRECTOR OF TRANSPORTATION
DEVELOPMENT**

THRU: ALLAN POLLOCK, GENERAL MANAGER

**SUBJECT: ADOPTION OF RESOLUTION #2017-06, WHICH APPROVES THE
2017 TITLE VI PROGRAM**

Issue

Shall the Board adopt Resolution #2017-06 (in Attachment A) to approve the 2017 Title VI Program and direct the General Manager to submit the document to the Federal Transit Administration by May 31, 2017?

Background and Findings

Title VI of the Civil Rights Act protects people from discrimination based on race, color, and national origin. The FTA requires transit agencies receiving federal funds to maintain a Title VI Program that follows the statutes, laws, regulations, and administrative rules established in 49 U.S.C. Chapter 53. FTA requires the Title VI Program to be updated every three years and submitted to them for review. The Salem Area Mass Transit District (SAMTD) Title VI Program was last submitted to FTA on May 31, 2014. Thus, staff have compiled a new document provided in Attachment B that updates the following:

- Demographic data from the 2008-12 American Community Survey (U.S. Census) to 2011-15 data
- Incorporates the Cherriots Regional service since it is no longer a demand responsive service, but operates as a “commuter express” fixed-route
- The thresholds that define a “Major Service Change” and the definition used for “low-income” populations
- Title VI Policies that define the process for Disparate Impact and Disproportionate Burden Analyses, which are required with any Major Service Change or Fare Change
- Set service standards and policies for each route type for all fixed routes
- Report on service monitoring and how the District’s bus service is performing in relation to minority routes versus non-minority routes

Financial Impacts

None.

Recommendation

Staff recommends the board adopt Resolution #2017-06 to approve the 2017 Title VI Program; and direct the General Manager to submit the document to the Federal Transit Administration (FTA) by May 31, 2017 as required by federal rules and regulations.

Proposed Motion

I move that the Board adopt Resolution #2017-06 to approve the 2017 Title VI Program; and direct the General Manager to submit the document to the Federal Transit Administration (FTA) by May 31, 2017 as required by federal rules and regulations.

or

I move that the board adopt staff recommendation.

Resolution No. 2017-06

2017 TITLE VI PROGRAM FOR SALEM AREA MASS TRANSIT DISTRICT

WHEREAS, the Salem Area Mass Transit District, hereafter referred to as "District," is required under Federal regulations as a designated recipient of Federal funds, to submit a Title VI Program under FTA circular 4702.1B; and,

WHEREAS, FTA rules and regulations contained in 49 USC §5307 (c)(1)(i) define what a fare change and Major Service Change are, and the minimum circumstances under which a Disparate Impact and Disproportionate Burden Analysis is required; and,

WHEREAS, the District is required to conduct a prescribed Disparate Impact and Disproportionate Burden Analysis in the event of certain Major Service Changes or increases or decreases to transit fares; and,

WHEREAS, systemwide service standards and policies must be in place in order to comply with Title VI rules and regulations; and,

WHEREAS, the District has occasion to effect changes to its fares and/or its transit services to carry out its mission; and,

WHEREAS, a public hearing is required by the Federal Transit Administration (FTA) in the event of Major Service Changes that call for a reduction in transit service or any increase to transit fares; and,

WHEREAS, the District wishes to ensure that the public has ample opportunity to participate in the consideration of the change of transit fares, and in the planning and implementation of Major Service Changes, consistent with Federal regulations; and,

WHEREAS, the District wishes to ensure that people living under 150 percent of the Federal Poverty Level (FPL) do not bare any more burden of an increase in fares or in the event of a Major Service Change than those above 150 percent of FPL;

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

THAT, the Board adopts Resolution #2017-06 to approve the 2017 Title VI Program as written; and direct the General Manager to submit the document to the Federal Transit Administration by May 31, 2017 as is required by federal rules and regulations.

[BD-61]

ADOPTED by the Board of Directors on the 25th day of May, 2017, and effective thereupon.

ATTEST:

Secretary
Board of Directors

President
Board of Directors

MEMO TO: BOARD OF DIRECTORS

FROM: WENDY FETH, ACCOUNTANT
PAULA DIXON, DIRECTOR OF ADMINISTRATION

THRU: ALLAN POLLOCK, GENERAL MANAGER

SUBJECT: FY2017 THIRD QUARTER FINANCE REPORT

Issue

A Finance Report is prepared for each quarter of the fiscal year to provide the Board with timely information about the District's financial performance.

Background and Findings

The Board adopts a Budget for the District on an annual basis. The Budget is a plan that contains District resources and requirements.

The quarterly Finance Report provides information about how that plan is being implemented and includes statements for the General Fund, Transportation Programs Fund, and Capital Project Fund. The statements compare the budget amounts to actual amounts by the legal appropriations category.

The District's primary sources of revenue are Federal and State Grant funds and property taxes. Grants are generally reimbursed on a quarterly basis. Most of the property taxes have been received by the end of the third quarter, and as a result, General Fund revenue is at seventy-one percent of the annual budget.

One particular note of interest is the DMAP Reimbursement received to date is a negative number. This is a result of reconciling FY2016 expenses against revenues received which created a balance due back to Oregon Health Authority (OHA).

General Fund expenses are under budget in most appropriation levels. Communication - Customer Service is at seventy-seven percent of the annual budget as a long-time employee retired which resulted in leave cash outs and a need for temporary help.

The Transportation Programs Fund revenue is at sixty-one percent of budget primarily due to the reimbursement nature of the federal grants. Of note, the Federal 5307 is at 6%

currently but after fiscal year-end accruals we will have requested the full amount budgeted as reimbursement.

In the Transportation Programs Fund, all three divisions are close or under budget.

The Transportation Development – Special Transportation Coordination program is at eighty-one percent of the annual budget. A grant to fund a new bus purchase for Legacy Health, formerly known as Silverton Health, (\$83,582) was obtained after the budget was adopted. A budget amendment will be brought to the Board at the next Board meeting to increase budget appropriations for this grant.

Overall, the Capital Project Fund has spent two percent of the approved budget at the end of the third quarter. The capital projects are broken out by division and further if there are multiple projects in that division. Many of the capital projects are in the planning or procurement stages. Many of these projects will be carried forward to next fiscal year and are expected to be completed in that year.

Financial Impact

None

Recommendation

Receive and file.

Proposed Motion

None

Salem Area Mass Transit District
 Fiscal Year 2016-17 Third Quarter Financial Report

General Fund Revenues/Resources and Expenses/Requirements Resolution Summary	Actual	75% of Adopted Budget	FY2016-17 Adopted Budget	% of Budget
Operating Revenues/Resources				
Passenger Fares	2,185,021	2,294,250	3,059,000	71%
Other Fixed Route Services	178,747	217,500	290,000	62%
Planning Grant	60,546	91,125	121,500	50%
Federal 5307	597,018	2,981,400	3,975,200	15%
DMAP Reimbursement	(118,700)	51,000	68,000	-175% ①
Miscellaneous	252,051	87,450	116,600	216% ②
Property Taxes	11,259,479	8,484,525	11,312,700	100%
Oregon State In-Lieu	2,495,061	4,125,000	5,500,000	45% ③
Interest on Investments	167,102	60,000	80,000	209%
Energy Tax Credit	222,714	-	-	
Operating Revenues/Resources Total	17,299,039	18,392,250	24,523,000	71%
Operating Expenses/Requirements				
General Manager/Board of Directors Administration	362,680	452,925	603,900	60%
Communication	1,269,239	1,360,050	1,813,400	70%
Transportation Development	999,965	1,187,025	1,582,700	63%
Operations	1,283,948	1,490,835	1,987,780	65%
Unallocated General Administration	12,560,682	12,897,600	17,196,800	73%
	603,911	865,050	1,153,400	52%
Operating Expenses/Requirements Total	17,080,425	18,253,485	24,337,980	70%

① As a result of reconciling FY2016 expenses to revenues received a balance was due back to Oregon Health Authority (OHA). OHA was refunded these monies that created the negative number.

② Higher than expected miscellaneous revenue from reimbursement of salary for employee working for union and \$74,623 SAIF dividend.

③ Third quarter payment received in April 2017.

Salem Area Mass Transit District
 Fiscal Year 2016-17 Third Quarter Financial Report

General Fund Department Expenses/Requirements Summary	Actual	75% of Adopted Budget	FY2016-17 Adopted Budget	% of Budget
General Manager/Board of Directors				
General Manager	353,428	415,800	554,400	64%
Board of Directors	9,252	37,125	49,500	19%
Total	362,680	452,925	603,900	60%
Administration				
Human Resources	427,355	458,775	611,700	70%
Human Resources Safety	129,054	137,625	183,500	70%
Finance	712,830	763,650	1,018,200	70%
Total	1,269,239	1,360,050	1,813,400	70%
Communication				
Marketing and Communications	586,844	786,675	1,048,900	56%
Customer Service	413,121	400,350	533,800	77%
Total	999,965	1,187,025	1,582,700	63%
Transportation Development				
Transportation Development Administration	423,034	591,735	788,980	54%
Information Technology	700,251	711,600	948,800	74%
Vanpool Lease	160,663	187,500	250,000	64%
Total	1,283,948	1,490,835	1,987,780	65%
Operations				
Operations Administration	315,117	369,000	492,000	64%
Vehicle Maintenance	2,981,972	3,236,325	4,315,100	69%
Facility Maintenance	613,368	586,800	782,400	78%
Security	348,248	410,775	547,700	64%
Cherriots Fixed Route Service	8,140,236	8,108,100	10,810,800	75%
West Salem Connector Operations	139,642	150,075	200,100	70%
West Salem Connector Vehicle Maintenance	22,099	36,525	48,700	45%
Total	12,560,682	12,897,600	17,196,800	73%
Unallocated				
General Administration	603,911	865,050	1,153,400	52%

Salem Area Mass Transit District
 Fiscal Year 2016-17 Third Quarter Financial Report

Transportation Programs Fund Revenues/Resources and Expenses/Requirements Resolution Summary	Actual	75% of Adopted Budget	FY2016-17 Adopted Budget	% of Budget
Operating Revenues/Resources				
Passenger Fares	270,847	282,225	376,300	72%
Federal Direct 5310 Funds	32,328	168,000	224,000	14%
Federal 5311 Funds	145,746	242,175	322,900	45%
Federal New Freedom	39,817	64,275	85,700	46%
Federal 5310 Funds Through State	412,646	547,425	729,900	57%
Rideshare Grant	85,346	149,475	199,300	43%
TDM Grant	71,408	115,875	154,500	46%
DD53 Revenues	1,232,067	1,950,000	2,600,000	47%
Federal 5307	48,318	617,400	823,200	6%
DMAP Revenues	7,220,999	7,627,575	10,170,100	71%
STF Pass Through Funds	267,122	208,050	277,400	96%
State STF Funds	719,328	914,475	1,219,300	59%
Operating Revenues/Resources Total	10,545,972	12,886,950	17,182,600	61%
Operating Expenses/Requirements				
Operations	11,989,714	12,610,665	16,814,220	71%
Communication	162,228	174,975	233,300	70%
Transportation Development	463,997	477,433	636,577	73%
Operating Expenses/Requirements Total	12,615,939	13,263,073	17,684,097	71%

Salem Area Mass Transit District
 Fiscal Year 2016-17 Third Quarter Financial Report

Transportation Programs Fund Program Expenses/Requirements Summary	Actual	75% of Adopted Budget	FY2016-17 Adopted Budget	% of Budget
Operations				
CherryLift	3,184,699	3,622,815	4,830,420	66%
RED Line	220,374	227,550	303,400	73%
CARTS	994,432	1,132,725	1,510,300	66%
DMAP/WVCH	7,590,209	7,627,575	10,170,100	75%
Operations Total	11,989,714	12,610,665	16,814,220	71%
Communication				
Mobility Management/Travel Trainer	162,228	174,975	233,300	70%
Transportation Development				
Special Transportation Coordination	228,150	212,083	282,777	81% ④
Trip Choice	235,847	265,350	353,800	67%
Transportation Development Total	463,997	477,433	636,577	73%
Transportation Programs Fund Total	12,615,939	13,263,073	17,684,097	71%

④ A grant to fund a new bus purchase for Legacy Health formerly known as Silverton Health (\$83,582) was obtained after the budget was adopted. A budget amendment will be brought to increase this budget at the June Board Meeting.

Salem Area Mass Transit District
 Fiscal Year 2016-17 Third Quarter Financial Report

Capital Project Fund Revenues/Resources and Expenses/Requirements Resolution Summary	Actual	FY2016-17 Adopted Budget	% of Budget
Capital Revenues/Resources			
Federal STP Funds	4,014	2,248,500	0%
Federal 5310 Funds Through State	363	224,300	0%
Federal Flex Funds	23,863	1,927,600	1%
FTA 5339 Funds	-	1,943,500	0%
Federal 5307	-	2,503,000	0%
Federal STP Funds	3,290	107,800	3%
Federal 5309 Funds	481	2,385,000	0%
Connect Oregon Funds	-	1,000,000	0%
State STF Funds	-	264,600	0%
Capital Revenues/Resources Total	32,011	12,604,300	0%
Capital Expenses/Requirements			
Administration	1,485	349,000	0%
Transportation Development			
Capital Project Administration	21,134	57,800	37%
Keizer Transit Center	80,573	1,679,800	5%
South Salem Transit Center	418	1,520,700	0%
Bus Stops & Shelters	47,343	1,720,999	3%
BI Project	-	125,000	0%
Technology Equipment	69,575	232,000	30%
Operations			
Del Webb Improvements	56,830	330,500	17%
Shop Equipment	-	158,000	0%
Ops Technology Equipment	-	125,000	0%
Cherriots Revenue Vehicles	10,166	5,950,000	0%
CherryLift Revenue Vehicles	405	635,400	0%
CARTS Revenue Vehicles	405	488,900	0%
CH2 Tenant Improvements	14,287	-	0%
CH2 Lease Space Improvements	5,000	50,000	10%
Capital Expenses/Requirements Total	307,621	13,423,099	2%

MEMO TO: BOARD OF DIRECTORS

**FROM: ROXANNE BELTZ, TRIP CHOICE PROGRAM COORDINATOR
STEVE DICKEY, DIRECTOR OF TRANSPORTATION DEVELOPMENT**

THRU: ALLAN POLLOCK, GENERAL MANAGER

SUBJECT: CHERRIOTS TRIP CHOICE THIRD QUARTER REPORT

Issue

The FY 2016-2017 third quarter report of the Cherrlots Trip Choice Program.

Background and Findings

Cherrlots Trip Choice program activities, goals and metrics are structured around the 2015 – 2017 ODOT approved work plan and the 2015 – 2020 Cherrlots Trip Choice Strategic Plan which details specific activities and improvements to the regional TDM program.

During the third quarter staff completed the annual Work Plan for 2017-2018 and the Market Analysis which will be used to guide program outreach. Staff is also finishing up the annual Student Poster Contest; the posters have been judged and the winners are being recognized throughout April and May.

Financial Impact

None

Recommendation

None

Proposed Motion

None. Information Only.

CHERRIOTS TRIP CHOICE

3rd Quarter Report FY 2016-2017

January ~ February ~ March 2017

During the 3rd Quarter of FY 2016-2017, Cherrlots Trip Choice continued work in accordance with the recommendations made in the 2015-2020 Strategic Plan. Our tasks and the activities associated with those are detailed in our work plan which can be summarized as, management of the Regional Rideshare Database, providing marketing, outreach and incentives for the use of all transportation options and promotion and expansion of TDM tactics within Polk, Marion, and Yamhill Counties.

DRIVE LESS CONNECT

Drive Less Connect is Oregon's secure, easy-to-use online ride-matching tool that matches people who want to share the ride to work, school or play. We have seen a decrease in interest in utilizing the database and the number of active users has started to decrease. ODOT has indicated that in the coming fiscal year they will be researching ridematching platforms since the current one is no longer meeting the needs of the users and it is not keeping up with technology.

Drive Less Connect ~ 3rd Quarter 2016-2017

Total active users	694	Carpool trips	2060
Total registered users	4065	Did Not Work trips	813
New users.....	109	Vanpool trips	1694
Non SOV Miles Logged	164,322	Walk trips	449
Bike trips	902	Telework trips	256
Bus trips	663	Drive Alone trips	689

Ridematching statistics:

Ridematch search performed	9465
Ridematch search with no results....	2324
Ridematch requests sent	4074

PROJECTS AND PROGRESS

MARKET ANALYSIS

The Cherrlots Trip Choice (CTC) program covers a large geographic area spanning three Oregon counties; Polk, Marion, and Yamhill. The region includes both large urban areas

and small rural cities making it challenging for staff to monitor and track every employer or agency in the service area. Based on the recommendations made in the programs strategic plan, Trip Choice staff developed a market analysis to help prioritize outreach strategies. The market analysis is attached.

WORK PLAN

Staff completed the 2017-2018 work plan as required by ODOT and the MWVCOG. The work plan is attached as part of the market analysis.

STUDENT POSTER CONTEST

Staff is completing work on the annual poster contest. The theme this year was “Oh, the places you will go” and students were asked to create posters representing places they would go using a transportation option. Of the 400 + posters that were submitted, six winners were selected and 13 honorable mentions. Many of the posters will be featured in the 2018 calendar and exhibited in the Salem Art Associations Young Artist Showcase.

OUTREACH and MEETINGS

Staff participated in the following events or activities:

- Marion County – Community Health Improvement Partnership (CHIP) Workgroup meeting
- DMV Headquarters - Brown Bag Lunch n’ Learn
- Winter-Maple Family Friendly Bikeway and Safe Routes to School (SRTS) workshop
- Employer Vanpool Think Tank w/SMART in Wilsonville
- Transportation Options training for student services staff at Willamette University

Ongoing participation and activities -

- Association for Commuter Transportation (ACT)
- Board members of Transportation Options Group of Oregon
- Statewide TDM and ToGo quarterly meetings
- Valley VanPool Partnership
- Quarterly ETC networking and training lunch
- Drive Less Connect Regional Network Administrators meetings
- Cherriots Wellness Committee
- Cherriots Connects Committee



Cherriots Trip Choice Market Analysis & Outreach Plan

*MISSION: **Cherriots Trip Choice** empowers people to navigate their community in ways that improve livability and quality of life.*

INTRODUCTION

The Cherriots Trip Choice (CTC) program covers a large geographic area spanning three Oregon counties; Polk, Marion and Yamhill. The region includes both large urban areas and small rural cities making it challenging for staff to monitor and track every employer or agency in the service area. Based on the recommendations made in the strategic plan, Trip Choice staff has developed this plan to help prioritize outreach strategies.

PROGRAM SUMMARY

The regional travel options program now known as Cherriots Trip Choice originated in 1974 as a carpool matching program with the objective of alleviating parking demand in the downtown and Capitol Mall areas of Salem. Over the years the program has grown as the community has grown, now serving Polk, Marion and Yamhill counties offering a wide variety of programs and services.

SERVICES and PROGRAMS PROVIDED

Cherriots Trip Choice provides a variety of Transportation Demand Management (TDM) strategies aimed at reducing the demand for roadway travel, particularly in single occupancy vehicles. These strategies address a wide range of externalities associated with driving including congestion, poor air quality, less livable communities, reduced public health, dependence on oil, reduced environmental health, and climate change.

In recent years, the Cherriots Trip Choice program has focused on promoting ridesharing (which includes carpooling and vanpooling) along with education and outreach regarding safe bicycling and walking. The program also offers an Emergency Ride Home program and provides information about regional Park and Ride lots. Each of these activities or programs has the potential to influence behavior change and is typically promoted in aggregate with one another.

Customer Relationship Management

In order to track the programs expanded reach both geographically and demographically, and determining who the “best-fit” customers are, the customer relationship database (ACT Sage) has been upgraded to the most recent version. This database will be used to manage and track contacts, as well as provide a place to note follow up strategies and other useful customer information.

Service Tiers

One of the first tasks that are already underway is validating the information in the ACT Sage database, as well as updating/adding in new contacts. While developing prioritized service tiers was initially identified in the strategic plan as a way to develop unique messaging for employers and individuals, under closer evaluation it is not necessary to develop such a formal structure. As staff prioritizes employers and individuals for regional outreach it will become obvious what modes to promote to compliment the land use patterns, geographic characteristics, and available transportation options in the service area.

OUTREACH STRATEGY OVERVIEW

CTC staff has identified four outreach target categories; businesses, communities, individuals and educational institutions. Identifying how and who to contact within these targets differs based on several variables, however the following will act as a guideline for 2017 – 2019 outreach.

BUSINESS

Business outreach has been the foundation of the program for many years, making this target the one CTC staff has the most knowledge with currently. There

are 300 + businesses identified in the Drive Less Connect Database and another 1400 businesses in the ACT Sage customer relationship database (ACT Sage). This information provides a solid base from which to build upon. When the design of new marketing literature is completed the targets will be contacted. Staff is also developing a "New Employee Kit" to give to ETC's (or other appropriate person) for use when they conduct new employee orientation.

To build the relationship with existing businesses 36 businesses/work sites (see attachment A) have been identified as targets to conduct outreach in 2017 – 2018. These are either large employers/work sites, receptive employer/work sites or businesses/work sites that have participated in TO events in the past. This list is in no way intended to be exhaustive, but it will serve as a starting point and additional targets will be added as CTC staff becomes aware of them.

COMMUNITIES

CTC staff attends about 14 community and 10 employer specific events each year, making contact with thousands of people each year. While these have been the primary contact with communities in the past, in order to better serve the communities additional research into other community events needs to take place. This will be accomplished by researching and identifying chambers in other cities, community groups, annual community events, partner events and having Cherriots staff scan local newspapers for opportunities.

Other ways to reach households/community members are through utility bill inserts, attendance at community events, local Chamber participation and advertising via news outlets serving the area. All of the sources will be researched and utilized if deemed an adequate use of resources.

EDUCATIONAL INSTITUTIONS

Each level of school has age appropriate activities and outreach that are already taking place, so additional outreach will be noted as such. It is important to note that this area overlap with community outreach since many of the events that staff participate in include children.

Elementary

CTC currently engages with this level by fulfilling requests for promotional items for school functions. There are several schools in this area that are in the beginning stages of establishing Safe Routes to School (SRTS) programs. CTC role in those programs will be one of encouragement and education. This includes assisting with Walk/Bike to School Days, supporting schools with SRTS specific promotional items and co-sponsoring safety bike checks or classes.

Middle School & High School

Current outreach includes inclusion in the annual transportation options themed poster contest which results in a calendar using the best 13 posters. Further outreach will include featuring the posters in a gallery setting (at Bush Barn Gallery in Bush Park). CTC staff also participate at annual bike rodeo's, bike repair and/or safety classes, and helmet distribution.

Higher Education

Current outreach includes tabling at a variety of school sponsored events, and providing information regarding Drive Less Connect. There are opportunities to conduct additional outreach in the form of freshman orientation and new student packets. Staff will meet with existing University or College contacts to devise additional ways to get messages to students.

INDIVIDUALS

As outlined in the strategic plan and the 2017-2019 Work Plan, there will be a follow up survey with households who participated in the 2015 Individualized Marketing campaign to determine current mode use and interest in additional information (IM 2.0).

There will also be an online awareness and travel survey currently being created by ODOT and distributed statewide. In the CTC region the survey will be distributed to users in the DLC database, CTC database, and through neighborhood associations. This is scheduled to take place in the spring or summer of 2018.

PROGRAM GROWTH

It can be challenging to identify new businesses, work sites or other locations that could benefit from CTC services, however several activities have been identified that can lead to new contacts. These are broken down into two categories -- traditional methods and new technology.

Conventional Methods

Conventional methods include gathering lists of new or growing businesses from business license registration, attending business and chamber functions, speaking at events and attending other business focused events. There are also Cherriots staff members who review regional newspapers and they will be looking out for prospective business that may be receptive to CTC services or events taking place that might be appropriate for tabling.

Another conventional method of gauging employer interest is through surveying. Alta Planning (The firm now under contract with ODOT to conduct statewide outreach for TO) recently conducted a transportation options assessment for the City of Vancouver in which they contacted businesses to examine the potential for conducting a commute options program in that area. A questionnaire was used to help identify businesses that might be interested in participating in such a program. (See Attachment B for questionnaire sample)

The goal of the questionnaire will be to identify and track businesses by scoring them according to specific criteria such as offering free parking, interested in receiving transportation materials, offering employees a free transit pass, offering bike parking, etc. This will help staff to prioritizing which businesses have the most potential for further contact/engagement. The survey could also be used with the existing companies already identified in order to gain a more in depth understanding of the employer's needs.

Social Media

New technology and social media will also be effective ways to generate leads and find receptive businesses. CTC staff will be working on the web presence as well as Facebook and Twitter in the coming year. Other methods worth exploring, mining leads and writing on LinkedIn, create a "product" video, blog consistently and change our email signature occasionally to be more compelling. Staff will continue to explore emerging technologies and adapt as needed.

CHERRIOTS TRIP CHOICE WORK PLAN

As part of the current transition of TO program management from ODOT Public Transit to ODOT Active Transportation, the CTC program was required to create a new and more in depth work plan than in the past. The goal of this is to realign the TO program goals with the ODOT TO program performance metrics identified in the Statewide TO plan.

With this change, the CTC work plan identifies many of the tasks associated with this Market Analysis. While not all of the activities outlined in the Work Plan are relevant, the Plan (in its entirety) is included as Attachment C.

ATTACHMENT A - CTC Employer Outreach

Employer Name	Address	City	# of Empl.	Notes
Capitol Auto Group		Salem	304	Green business
Center 50+	2615 Portland Rd NE	Salem		
DeSantis Landscaping		Salem	54	Green business
Fred Meyer		Salem	700	
Garmin AT	2345 Turner Rd SE	Salem		
Green Acres Landscape		Salem	70	Green business
Kaiser Permanente		Salem	700	Not all in one location
Life Source		Salem	92	Green business
Marion-Polk Food Share	1600 Salem Industrial Dr NE	Salem		
Norpac Foods			700	Not all in one location
ODOT - 3930 Fairview	3930 Fairview Industrial Dr. SE	Salem		
ODOT - Building K	455 Airport Rd SE. Building K	Salem		
ODOT -- Cottage St NE	680 Cottage St NE	Salem		
OR Judicial Dept Supreme Court	1163 State St	Salem		
Oregon Building Codes Division	1535 Edgewater Street NW	Salem		
Oregon Community Colleges & Workforce Development	255 Capitol St NE	Salem		
Oregon DAS - Fleet Admin	1100 Airport Rd SE	Salem		
Oregon Department of Fish & Wildlife	3406 Cherry Ave NE	Salem		
Oregon Department of Justice - Commerce Bldg	158 12th St NE	Salem		

Oregon Department of Justice - Hawthorne	610 Hawthorne Ave SE	Salem		
Oregon DHS - Division of Medical Assistance Programs	2575 Bittern St NE			
Oregon DHS - Health, Policy & Research	1225 Ferry St SE	Salem		
Oregon DHS - Library Bldg	250 Winter St NE	Salem		
Oregon Employment Relations Board	528 Cottage St NE Ste. 400	Salem		
Oregon Military Department	1776 Militia Way SE	Salem		
Oregon Office of State Treasurer	350 Winter St NE. Ste. 100	Salem		
Oregon Parks & Recreation Department	725 Summer St NE. Ste. C	Salem		
Oregon Public Utilities Commission	550 Capitol St NE	Salem		
Oregon Real Estate Agency	1177 Center St NE	Salem		
Oregon State Capitol	866-925 COURT ST NE	Salem		
Oregon State Police - Portland Rd	3772 Portland Rd NE	Salem		
Oregon Workers Comp Division	350 Winter St NE	Salem		
Oregon Youth Authority	530 Center St NE	Salem		
Roth		Salem	500	
SAIF Corporation		Salem		
Salem Clinic	2020 Capitol St NE	Salem		
Salem Convention Center		Salem	65	Green business
Salem Hospital		Salem	3300	
Salem Public Library - West Salem	395 Glen Creek Rd NW	Salem		
Shangri-La Corp	4080 Reed Rd SE	Salem		
Spirit Mountain		Grand Ronde	1500	
State Data Center	530 Airport Rd SE	Salem		

State Farm Insurance - Hawthorne	650 Hawthorne Ave NE	Salem		
SUMCO			600	
Supra Technologies	4001 Fairview Industrial Dr SE	Salem		
T-Mobile	Fairview Industrial Dr SE	Salem	1000	
Travel Salem		Salem	12	Green business
Willamette Ear Nose and Throat	3099 River Rd S	Salem		
Willamette University	900 State St	Salem		

Attachment B - Business Transportation Services Assessment

Employee Transportation Questions

1. How many employees work at your business? How many are full-time/part-time/ contractors? Does the number of employees vary predictably through the year? What about the hours employees are working?
2. Where do employees commute from?
3. What shifts do employees work?
4. Are employees expected to use their personal vehicles for work-related trips (e.g. transporting materials, transport to meetings)? Are fleet vehicles available for this purpose? Are employees reimbursed at the federal mileage rate for these trips?
5. As far as you know, do employees make personal trips during the day downtown for meetings, lunch, or happy hour?
6. How many free parking spots are available to employees? Are there enough parking spots that every employee can count on getting one? If not, how are parking spots assigned?
7. Does your business provide transportation information (e.g. bus schedules, bike maps) to employees?
8. As far as you know, do any of your employees walk, bike, take the bus, or carpool to work? If so, how many?
9. What barriers do employees face for commuting by foot, bike, bus, or carpool? (e.g. different shifts, lack of transit options, distance from work)
10. Do employees participate in an existing carpool program? Would employees be interested in participating in a carpool or vanpool program?

11. Does your business offer a free or reduced-cost transit pass to employees?
12. Does your business offer employees facilities like secure bike parking and/or showers?
13. Would incentives (e.g. gift cards, bike lights, water bottles) encourage employees to walk, bike, take the bus, and/or carpool to work? If so, what incentives do you think would be most attractive?
14. How do employees receive communications (e.g., email, letters, bulletin boards, meetings) Do employees have a work email? If so, would it be possible to send them an email on our behalf about the program?
15. Would your business be interested in participating in a commute program to encourage employees to walk, bike, ride transit, and carpool to work? If no, would you be willing to receive and share transportation information with employees?
16. Please provide us with the name, phone number, and email of best person to assist us with collecting any additional data about employee transportation.

Attachment C – Cherriots Trip Choice Work Plan



Work Plan

July 1, 2017 – June 30, 2019

Cherriots Trip Choice (CTC) is the transportation options (TO) program for Marion, Polk and Yamhill Counties, providing information and referrals to assist individuals seeking alternatives to the single-occupant vehicle. This is achieved by utilizing a variety of methods including community and employer outreach, dissemination of marketing literature and utilizing social media.

Cherriots Trip Choice Strategic Plan will continue to inform and guide the programs activities intended to reduce SOV's, educate the community about transportation options and build/maintain strong partnerships with regional organizations, people and communities. Current staffing is 2.7 FTE serving 518,670 people in Polk, Marion and Yamhill Counties.

PROGRAM GOALS & OBJECTIVES

During the first part of phase three (2017 – 2018) of the Cherriots Trip Choice Strategic Plan, the team will implement the marketing and outreach plan developed in 2016-2017. This plan includes marketing to new employees, broadening and deepening the ETC network and conducting outreach to underserved and LEP communities. Additional outreach will include surveying the Individualized Marketing (IM) participants (from the 2015 campaign), strengthening and intensifying outreach efforts regarding safety messaging and continuing to leveraging partner relationships.

During the second part of phase three (2018 – 2019) of the Cherriots Trip Choice Strategic Plan, the team will refine program goals based on performance measures, convene key partners to evaluate program direction, determine feasibility of bringing the Trip Choice Assistant to full time and reevaluate service tiers developed in 2017.

The following tasks and activities support the implementation of Cherrlots Trip Choice goals and objectives by guiding the day-to-day activities of program staff. It is important to note that priorities can shift and (at times) projects and staff activities may need to be re-evaluated.

Our Mission: Cherrlots Trip Choice empowers people to navigate their communities in ways that improve livability and quality of life.

Task 1) Encourage residents, employees and visitors to reduce SOV travel by taking options such as telework, rideshare, transit, active transportation and other transportation demand management options.

A) Marketing. Promoting transportation options (TO) available in the region, cities and neighborhoods through publicly available information distributed to the general public or targeted audiences.

Activities (General)	Deliverable	Goal	Metric <i>(for internal use only)</i>
I. Implement marketing and outreach plan developed in 2016-2017 <i>Begin in July 2017- then ongoing</i>	Quarterly report on outreach activities as relates to the plan	1. Complete all marketing and outreach activities identified in the plan 2. <i>In 2018 – 2109 reevaluate service tiers</i>	1. How much of marketing and outreach plan is completed
II. Develop transportation options literature, brochures, pamphlets and posters and distribute to appropriate locations throughout the region <i>July – Sept 2017</i>	Replace all literature with new logo and updated program information	1. Update/replace all Trip Choice documents and create new ones if needed	1. Number of documents updated or created 2. Number of pieces of literature distributed including where and to whom

Activities (General)	Deliverable	Goal	Metric <i>(for internal use only)</i>
<p>III. Create and distribute a periodic newsletter relating to transportation options. Distribution includes:</p> <ul style="list-style-type: none"> • Cherriots staff and Board • MWVCOG • Individuals and Stakeholders. • ETC's and Businesses • Community Groups • Schools • IM participants <p>Launch Oct 2017- then ongoing</p>	<p>Quarterly (at a minimum) newsletter is created and distributed region wide</p>	<ol style="list-style-type: none"> 1. Reach at least 250 people quarterly 2. <i>In 2018-2019 target a reach of 500</i> 	<ol style="list-style-type: none"> 1. Number of people and organizations receiving newsletter 2. Details of any feedback received 3. Newsletter open rate
<p>I. Outreach to Limited English Proficiency (LEP) population</p> <p>Oct 2017</p>	<p>Quarterly report on outreach activities to LEP populations</p>	<ol style="list-style-type: none"> 1. Contact at least 1 LEP group quarterly and/or attend 1 function 	<ol style="list-style-type: none"> 1. Number of LEP people reached and/or meeting/event summary
<p>II. Outreach to youth by becoming involved in regional activities like Safe Routes to School</p> <p>Start in Aug 2017</p>	<p>Quarterly report on outreach activities at regional schools</p>	<ol style="list-style-type: none"> 1. Annually attend at least 2 SRTS functions 2. Annually present TO information to at least 2 schools in person 3. Promote summer youth pass 4. <i>In 2018-2019 partner with MWVCOG and SRTS advocates to expand education and outreach to more schools/students</i> 	<ol style="list-style-type: none"> 1. Number of SRTS functions attended 2. Number of presentations at schools and number of students reached 3. How many summer passes sold/distributed

Activities	Deliverable	Goal	Metric (for internal use only)
III. Annual student poster contest promoting TO Contest runs from Jan 2018 – March 2018 with associated activities all year	<ul style="list-style-type: none"> Report on poster contest participation Calendar with winning posters 	<ol style="list-style-type: none"> At least 16 schools participating in contest At least three school presentations recognizing contest participants Utilize posters for annual Cherriots calendar Distribute ~1000 calendars with letter promoting TO 	<ol style="list-style-type: none"> Numbers of schools participating Number of posters submitted Number of calendars distributed

B) Community and employer outreach. Create and attend events to share information about transportation options and relevant programs in the Willamette Valley.			
Activities	Deliverable	Goal	Metric (for internal use only)
I. Work with existing ETC's to enhance employee awareness and use of transportation options. Ongoing	Quarterly report on ETC interaction	<ol style="list-style-type: none"> Hold at least 3 ETC quarterly meetings Meet with at least 3 current ETC's and 2 potential ETC's annually 	<ol style="list-style-type: none"> Number of meetings and number of attendees Number of current ETCs Number of prospective ETC meetings
II. Contact households who participated in IM to determine current mode use and interest in additional information (IM 2.0) Aug 2017 – Nov 2017	Report on survey results and data collection summary	<ol style="list-style-type: none"> Survey IM participants Deliver additional information (physical or digital) if requested 	<ol style="list-style-type: none"> Number of households contacted Number of survey responses Number of households receiving new information
III. Promote Transportation Options (TO) to new employees regionally Ongoing	New employee TO kit developed and distributed	<ol style="list-style-type: none"> Create and deliver at least 5 sets of new employee TO kits to ETC's or to employer sites 	<ol style="list-style-type: none"> Number of set of kits delivered

Activities	Deliverable	Goal	Metric (for internal use only)
IV. Work with Cherriots marketing staff to conduct outreach to Limited English Proficiency (LEP) and youth populations. Start in Aug 2017	An outreach plan that includes LEP and youth communities	1. Set up a Cherriots working group to develop outreach strategies 2. Complete written plan no later than Oct 1, 2017	1. A completed, executable plan
V. Participate in community activities and events to promote TO. Ongoing	Quarterly report on community event participation	1. Calendar approx. 16 events per year 2. Seek new opportunities for participation in other events by working with Cherriots travel trainers, signing up for more chamber/community newsletters, and asking for leads from other vendors.	1. Number of events attended 2. Number of direct contacts at events
VI. Obtain promotional items for events that promote our services and message. Ongoing	Quarterly report on promotional items	1. Select and order appropriate promotional items	1. Distribute promotional items to event attendees to encourage transportation options
VII. Conduct an online awareness and travel survey. Survey will be distributed to users in the DLC database, CTC database, and through neighborhood associations. Spring/summer of 2018	Report on survey results	1. Obtain copy of survey from Alta or other partner 2. Distribute survey 3. Summarize results	1. Number of surveys sent 2. Number of survey responses

C) Statewide ride-matching database, Drive Less Connect (DLC). Support, locally administer and market the statewide ridematching tool.			
Activities	Deliverable	Goal	Metric (for internal use only)
I. Continue participation in planning, coordination and discussions regarding the database Ongoing	Quarterly report on activities in support of DLC	1. Participate in discussion as needed	1. Number of discussions CTC staff participated in regarding DLC
II. Participate in statewide Drive Less Challenge (or similar) campaign a. Work with local individuals, agencies and businesses to encourage participation Aug 2017 - Nov 2017	Quarterly report on outreach related to challenges	1. Participate in statewide Drive Less Challenge (or similar) campaign	1. Number of individuals, agencies and businesses participated 2. Number of ancillary events CTC has or participates in
III. Utilize DLC's reporting features to provide data to regional stakeholders and partners Ongoing	Quarterly reports to stakeholders and partners	1. Determine the baseline 2. Set and track targets once baseline has been established	1. Number of active and inactive participants that are currently in the database 2. Number of participants added

D) Emergency Ride Home (ERH). Support, administer and market the ERH program as a key transportation options resource.			
Activities	Deliverable	Goal	Metric (for internal use only)
I. Market, administer and fund the ERH program a. Provide information about ERH at area presentations, to the ETC's and in the new employee TO kit Ongoing	Quarterly report on marketing and utilization of the ERH program	1. Include information about ERH in all appropriate presentations and documents	1. Number of presentations that included information about ERH 2. Any other promotion of ERH 3. Number of participants in program 4. Usage

E) Valley Van Pool. Support, administer and market the regional ridesharing program in partnership with regional Willamette Valley partners.

Activities	Deliverable	Goal	Metric <i>(for internal use only)</i>
I. Promote and support Valley VanPool (VVP) through partnerships with CWCOG and point-2-point solutions (LTD) a. Evaluate expanding VVP to include bordering regions Started in March 2017 – ongoing	Quarterly report on Valley Van Pool partner activities	1. Participate in at least two Valley VanPool partner meetings annually 2. Make invitation to other regions to join VVP 3. Seek innovative ways to get more funding for VVP	1. Number of meetings attended 2. Number of other regions contacted 3. Grant application created and submitted
II. Manage and fund vanpool subsidy and incentive programs Ongoing	Quarterly report on vanpool activity associated with subsidy and incentive program	1. Work with vendor to add two new vanpools to the program annually 2. Work with vendor to ensure accurate entry of NTD data	1. Number of new vans started 2. Number of existing vans 3. Number of riders in vans
III. Continue tracking VMT reduction via vendor reports Ongoing	Quarterly report with VMT and emissions reductions of vanpools subsidized by Cherriots.	1. Track VMT reduction via vendor report	1. VMT reduction attributed to vanpools
IV. Work with vendors to build ridership Nov/Dec 2017 & March/April 2018	Quarterly report on van ridership	1. Conduct at least two promotions/events focused on increasing vanpool ridership	1. Number and type of promotion/events 2. Number of new riders 3. Follow up with event attendees

Task 2) Collaborate with other transportation options programs, government agencies, area employers and community members to provide interregional transportation options.

A) Be an active part of the statewide and regional Rideshare and TDM planning efforts, working cooperatively with other agencies, organizations and TDM programs.

Activities	Deliverable	Goal	Metric (for internal use only)
I. Continue participation in the quarterly Transportation Options meeting Ongoing	Quarterly report on participation in meetings pertaining to TDM	1. At least one CTC staff member attends each TO meeting.	1. Number of meetings each CTC staff member attended
II. Continue participation and collaborate with MWVCOG, Cherriots Board of Directors, ODOT- Active Transportation, and the Federal Highway Administration Ongoing	Quarterly reports on meetings.	1. At least one CTC staff member attends meeting as requested.	1. Number and type of meetings each CTC staff member attended
III. Work with Cherriots Marketing staff on creating and maintaining a "One-Stop-Shop" web site and social media presence for regional TO Depends on Marketing staffing and RFP - estimated start in Aug 2017	<ul style="list-style-type: none"> • Quarterly report on web development and social media activities • Time line for process • Calendar for posting activities • Final Website 	<ol style="list-style-type: none"> 1. Meet with marketing staff monthly to assist in development of the CTC web site and social media presence 2. Develop a time line once process begins 3. Train CTC staff in web updates and social media management 4. Establish monthly posting requirements and assign responsibility for this 	<ol style="list-style-type: none"> 1. Number of meetings CTC attended 2. Tracking of web site and social media development activities <p><i>NOTE: These activities are contingent on getting a web developer and a social media person at Cherriots (both of these are outside of CTC control).</i></p>

Activities	Deliverable	Goal	Metric (for internal use only)
IV. Work with state, regional, and local jurisdictions to coordinate transportation options planning efforts as opportunities might arise Ongoing	Quarterly report on participation in cooperative planning activities and summary report (if needed)	1. At least one CTC staff member attends meeting as requested	1. Summary of meeting that CTC staff member attended

B. Work with state, regional, and local jurisdictions to facilitate safety messaging and promoting safe behaviors			
Activities	Deliverable	Goal	Metric (for internal use only)
I. Promotion of Oregonian Crossing messaging through events and social media July 2017 – June 2018	Quarterly report including summary of safety outreach and any survey results	1. Gather marketing material from ODOT 2. Design promotion campaign utilizing the Oregonian Crossing theme 3. Promote message at all outreach events 4. Conduct survey gauging awareness and behavior changes due to campaign 5. <i>In 2018 – 2019 determine campaign effectiveness and benefits of continuing or establishing new campaign</i>	1. Number and type of marketing materials distributed 2. Where and to whom were the materials distributed 3. Survey results
II. Be Safe-Be seen activities Oct/Nov 2017 – Depends on ODOT distribution of lights	Quarterly report of light distribution summary	1. Distribute up to 1000 blinky lights (or similar) annually	1. Number of lights (and/or safety items) given away and to whom

III. Wander Walks 5210 Ongoing	New Wander Walks™ maps	1. Create/print/distribute up to six new WanderWalks™ maps 2. <i>In 2018 – 2019 create/print/distribute up to six new WanderWalks™ maps</i>	1. Number of new maps created 2. Number of maps printed 3. Number of maps distributed and locations
IV. Open streets event Event schedule to take place in Aug/Sept 2017	Report on planning activities and event summary	1. Assist in the planning and coordination of an annual open streets event in Salem (This is already taking place)	1. Details about planning efforts 2. Report after event completion
V. Bicycling and Pedestrian Anticipate Sept – Oct 2017 and April – June 2018	Quarterly report listing bike and pedestrian related activities	1. Assist with at least two bicycling or walking activities/events. Past events include: Bike Roadeo, Fun Runs, National Night Out, Bike repair and/or safety classes, community rides and helmet distribution.	1. Number of events assisted with or attended

Task 3) Support State in its transportation options activities by sharing best practices through professional development.

A) Attend relevant conferences, trainings and events to share and collect regional, state, and national best practices.			
Activities	Deliverable	Goal	Metric (for internal use only)
I. Continue to seek and disseminate information regarding best practices and retain an active role in development and implementation of TDM policies Ongoing	Report on meetings attended or other relevant activities	1. A CTC team member will attend at least two TDM policy related functions annually	1. Number of TDM policy functions attended, by whom and summary of the event

B) Professional Development			
Activities	Deliverable	Goal	Metric (for internal use only)
I. Seek opportunities for professional growth. Includes participation in: <ul style="list-style-type: none"> a. Association for Commuter Transportation (Nationally and Regionally) b. Transportation Options Group of Oregon Ongoing	Report on conferences attended, trainings, webinars or other relevant event	1. Each CTC team member should attend one industry conference a year 2. Each CTC team member should attend (at least) one webinar or local event intended to expand industry comprehension	2. Number of functions each CTC team member attended/participated in

C) Program Development			
Activities	Deliverable	Goal	Metric (for internal use only)
I. Convene key stakeholders, staff, and other interested parties to establish a CTC steering committee evaluate program direction Start in Aug/Sept 2018	Steering Committee guidelines document Quarterly report on stakeholder meetings List of new or updated performance measures	1. Establish expectations and role of steering committee 2. Establish list of potential members of a steering committee 3. Set meeting date 4. Convene meeting 5. Have committee decide their priorities and goals for 2018 and beyond 6. Refine program goals based on performance measures	1. Number of participants on steering committee 2. Priorities and expectations document created 3. Status of quarterly report 4. New performance measures are established

D) Develop performance measures that incorporate existing metrics and new measurements developed as a result of the Oregon statewide Transportation Options Plan.

Activities	Deliverable	Goal	Metric <i>(for internal use only)</i>
II. Prepare quarterly reports for each quarter of FY 2017-2018 Nov 15, 2017 Feb 15, 2018, May 15, 2018 Aug 15, 2018	Quarterly reports summarizing progress on all deliverables	<ol style="list-style-type: none"> 1. Complete quarterly reports no later than: Nov 15, 2017, Feb 15, 2018, May 15, 2018 and Aug 15, 2018 2. Distribute reports to "Quarterly Report Distribution List" 	<ol style="list-style-type: none"> 1. Status of comprehensive quarterly report
III. Prepare annual report for fiscal year 2017-2018 Oct 1, 2018	Annual Report for FY 2017-2018	<ol style="list-style-type: none"> 1. Complete Annual Report no later than Oct 1, 2018 to "Annual Report Distribution List" 	<ol style="list-style-type: none"> 1. Status of comprehensive annual report IE: Was it filed on time and to the correct stakeholders?

MEMO TO: BOARD OF DIRECTORS

**FROM: MATT BERGGREN, TRANSIT PLANNER II
CHRIS FRENCH, SENIOR PLANNER**

THRU: ALLAN POLLOCK, GENERAL MANAGER

SUBJECT: PERFORMANCE REPORT – FY17 Q3

Issue

This memo provides details on all Cherriots service for the third quarter of FY17.

Background and Findings

Performance measures for the third quarter of Fiscal Year 2017 (F17 Q3) are included in Attachment A. FY17 Q3 began January 1, 2017 and ended March 31, 2017. All data are compared to the previous fiscal year. The data for these measures are derived from adjusted Trapeze schedules, vehicle fareboxes, passenger counting systems, and reservation software (RouteMatch and Mobility DR).

Categories reported below have been changed from past reports. Local Cherriots service is now separated from Cherriots Regional service.

Cherriots Local

Includes local fixed-route, local express routes, Qualified Human Service Organization (QHSO) routes, and the West Salem Connector.

- *Revenue Hours* – Up 6.7% (+41 Revenue Hours / Day)
The increase is a result of the combination of the January 2017 services changes and the introduction of Route 15X Airport Rd Park & Ride Express, the latter of which is paid for by the State of Oregon.
- *Revenue Miles* – Up 1.3% (+113 Revenue Miles / Day)
The increase is a result of the introduction of Route 15X Airport Rd Park & Ride Express, the latter of which is paid for by the State of Oregon.
- *Boardings* – Down 0.6% (-71 Boardings / Day)

Cherriots Regional

Includes regional express routes, CARTS deviated-fixed routes, CARTS flex routes, and CARTS dial-a-ride.

- *Revenue Hours* – Up 2.0% (+2 Revenue Hours / Day)
The increase is a result of a combination of the addition of a round trip on Route 1X (March 2016), and additional revenue hours added to CARTS 30 and 40 to help keep the buses on time (September 2016).
- *Revenue Miles* – Up 0.7% (+15 Revenue Miles / Day)
The increase is a result of the addition of a round on Route 1X (March 2016).
- *Boardings* – Down 12.0% (-79 Boardings / Day)
This decrease is a continuation of the trend we have seen on regional routes over the past few years.

RED Line

Includes shopper shuttles and dial-a-ride.

- *Revenue Hours* – Up 27.2% (+4 Revenue Hours / Day)
This increase is a result of increased boardings, mostly on the dial-a-ride portion of the RED Line service.
- *Revenue Miles* – Up 42.0% (+67 Revenue Miles / Day)
This increase is a result of increased boardings, mostly on the dial-a-ride portion of the RED Line service.
- *Boardings* – Up 28.8% (+9 Boardings / Day)
The dial-a-ride portion of the service has seen moderate increases in ridership.

CherryLift

Paratransit

- *Revenue Hours* – Down 1.1% (-3 Revenue Hours / Day)
This decrease is a result of decreased boardings.
- *Revenue Miles* – Down 3.3% (-100 Revenue Miles / Day)
This decrease is a result of decreased boardings.

- *Boardings* – Down 5.7% (-33 Boardings / Day)
This drop in ridership has continued since the introduction of the mobility assessment program.

State Bus Pass Program

Usage of the State Bus Pass Program as a percent of overall Cherriots ridership has increased from 2.7% in FY17 Q2 to 3.3% in FY17 Q3.

Since the launch of the program, 64,914 rides have been taken by State employees using their passes. On average, this is 307.6 rides per day.

January 2017 Changes

Staff made a number of changes on January 3, 2017, to increase reliability and to simplify the route numbering and structure. Because of this, the results in Attachment A reference both the new route numbers and the former route numbers. Some routes are grouped together (e.g. Routes 19 and 21 -- Former Route 1) to allow for comparison between FY16 and FY17.

Financial Impact

None

Recommendation

None

Proposed Motion

None

ATTACHMENT A

FY17 Q3 Performance Measures

January-March 2017

Table 1. Total Revenue Hours

Table 2. Average Revenue Hours / Day

Table 3. Total Revenue Miles

Table 4. Average Revenue Miles / Day

Table 5. Total Boardings

Table 6. Average Boardings / Day

Table 7. Average Boardings / Revenue Hour

Table 8. Total Boardings Using State Bus Pass Program

Table 9. Average Boardings / Day Using State Bus Pass Program

Table 10. State Bus Pass Program Share of Boardings and Customer Comments

Table 11. Route 15X

Table 1. Total Revenue Hours

Route	FY16 Q3				FY17 Q3			
	Jan 2016	Feb 2016	Mar 2016	Total	Jan 2017	Feb 2017	Mar 2017	Total
(Service Days)	20	20	23	63	21	19	23	63
CHERRIOTS LOCAL FIXED-ROUTE								
2 - Market / Brown	1,084	1,084	1,247	3,415	1,136	1,028	1,245	3,409
3 - Portland Road	605	607	696	1,908	629	570	690	1,889
4 - State Street	306	306	352	964	321	291	352	964
5,17 - Edgewater / Center (5/5A)	1,842	1,842	2,122	5,806	2,213	2,001	2,424	6,638
6,16 - Wallace / Fairview Industrial (6)	650	652	747	2,049	675	610	738	2,023
7 - Mission / State	312	312	359	983	328	297	359	984
8 - 12th / Liberty via Red Leaf	463	463	532	1,458	485	440	531	1,456
9 - Cherry / Parkmeadow (9/9A)	614	614	706	1,934	647	585	708	1,940
11 - Lancaster / Keizer	1,765	1,765	2,030	5,560	1,891	1,710	2,070	5,671
12 - Haysville	308	308	355	971	311	282	341	934
13,22 - Silverton Road / Salem Library (13)	605	605	702	1,912	643	582	705	1,930
14 - Windsor Island	305	305	351	961	323	292	354	969
15X - Airport Rd Park & Ride Express	N/A	N/A	N/A	N/A	422	383	463	1,268
18 - 12th / Liberty via Lone Oak (8A)	459	459	527	1,445	482	436	528	1,446
19,21 - N River Rd / S Commercial (1)	2,121	2,121	2,435	6,677	2,377	2,151	2,603	7,131
23 - Lansing / Hawthorne (10)	300	300	345	945	313	283	343	939
24 - State / Lancaster (4A)	305	305	351	961	321	290	351	962
<i>Total</i>	<i>12,044</i>	<i>12,048</i>	<i>13,857</i>	<i>37,949</i>	<i>13,517</i>	<i>12,231</i>	<i>14,805</i>	<i>40,553</i>
CHERRIOTS LOCAL ON-DEMAND								
West Salem Connector	300	300	345	945	315	285	345	945
CHERRIOTS QUALIFIED HUMAN SERVICE ORGANIZATION ROUTES								
91 - Garten Foundation	10	10	10	30	15	13	16	44
92 - Rockwest	14	14	12	40	11	10	12	33
<i>Total</i>	<i>24</i>	<i>24</i>	<i>22</i>	<i>70</i>	<i>26</i>	<i>23</i>	<i>28</i>	<i>77</i>
<i>Cherriots Local Total</i>	<i>12,368</i>	<i>12,372</i>	<i>14,224</i>	<i>38,964</i>	<i>13,858</i>	<i>12,539</i>	<i>15,178</i>	<i>41,575</i>
CHERRIOTS EXPRESS ROUTES								
1X - Wilsonville / Salem Express	170	170	226	566	207	187	226	620
2X - Grand Ronde / Salem Express	304	304	350	958	318	288	344	950
<i>Total</i>	<i>474</i>	<i>474</i>	<i>576</i>	<i>1,524</i>	<i>525</i>	<i>475</i>	<i>570</i>	<i>1,570</i>
CARTS DEVIATED-FIXED ROUTES								
10 - Woodburn / Salem	169	167	193	529	178	163	195	536
20 - Silverton / Salem	173	173	194	540	180	168	193	541
30 - Canyon Connector / Salem	173	177	206	556	206	191	229	626
40 - Polk County / Salem	184	181	207	572	209	183	227	619
50 - Dallas / Salem Express	148	143	167	458	155	141	168	464
<i>Total</i>	<i>847</i>	<i>841</i>	<i>967</i>	<i>2,655</i>	<i>928</i>	<i>846</i>	<i>1,012</i>	<i>2,786</i>
CARTS ZONE ROUTES								
25 - North Marion Flex	147	147	161	455	152	138	164	454
45 - Polk Flex	295	299	340	934	308	285	341	934
<i>Total</i>	<i>442</i>	<i>446</i>	<i>501</i>	<i>1,389</i>	<i>460</i>	<i>423</i>	<i>505</i>	<i>1,388</i>
CARTS DIAL-A-RIDE								
35 - Canyon Flex	98	111	131	340	111	62	108	281
<i>Cherriots Regional Total</i>	<i>1,861</i>	<i>1,872</i>	<i>2,175</i>	<i>5,908</i>	<i>2,024</i>	<i>1,806</i>	<i>2,195</i>	<i>6,025</i>
SHOPPER SHUTTLE & DIAL-A-RIDE								
RED Line Dial-a-Ride	184	187	229	600	287	277	307	871
RED Line Shopper Shuttle	121	136	162	419	125	126	174	425
<i>Total</i>	<i>305</i>	<i>323</i>	<i>391</i>	<i>1,019</i>	<i>412</i>	<i>403</i>	<i>481</i>	<i>1,296</i>
PARATRANSIT								
CherryLift	4,779	4,958	5,621	15,358	4,937	4,635	5,619	15,191

Table 2. Average Revenue Hours / Day

Route (Service Days)	FY16 Q3				FY17 Q3				Percent Change
	Jan 2016 20	Feb 2016 20	Mar 2016 23	Total 63	Jan 2017 21	Feb 2017 19	Mar 2017 23	Total 63	
CHERRIOTS LOCAL FIXED-ROUTE									
2 - Market / Brown	54.2	54.2	54.2	54.2	54.1	54.1	54.1	54.1	-0.2%
3 - Portland Road	30.3	30.4	30.3	30.3	30.0	30.0	30.0	30.0	-1.0%
4 - State Street	15.3	15.3	15.3	15.3	15.3	15.3	15.3	15.3	0.0%
5,17 - Edgewater / Center (5/5A)	92.1	92.1	92.3	92.2	105.4	105.3	105.4	105.4	14.3%
6,16 - Wallace / Fairview Industrial (6)	32.5	32.6	32.5	32.5	32.1	32.1	32.1	32.1	-1.3%
7 - Mission / State	15.6	15.6	15.6	15.6	15.6	15.6	15.6	15.6	0.1%
8 - 12th / Liberty via Red Leaf	23.2	23.2	23.1	23.1	23.1	23.2	23.1	23.1	-0.1%
9 - Cherry / Parkmeadow (9/9A)	30.7	30.7	30.7	30.7	30.8	30.8	30.8	30.8	0.3%
11 - Lancaster / Keizer	88.3	88.3	88.3	88.3	90.0	90.0	90.0	90.0	2.0%
12 - Haysville	15.4	15.4	15.4	15.4	14.8	14.8	14.8	14.8	-3.8%
13,22 - Silverton Road / Salem Library (13)	30.3	30.3	30.5	30.3	30.6	30.6	30.7	30.6	0.9%
14 - Windsor Island	15.3	15.3	15.3	15.3	15.4	15.4	15.4	15.4	0.8%
15X - Airport Rd Park & Ride Express	N/A	N/A	N/A	N/A	20.1	20.2	20.1	20.1	N/A
18 - 12th / Liberty via Lone Oak (8A)	23.0	23.0	22.9	22.9	23.0	22.9	23.0	23.0	0.1%
19,21 - N River Rd / S Commercial (1)	106.1	106.1	105.9	106.0	113.2	113.2	113.2	113.2	6.8%
23 - Lansing / Hawthorne (10)	15.0	15.0	15.0	15.0	14.9	14.9	14.9	14.9	-0.6%
24 - State / Lancaster (4A)	15.3	15.3	15.3	15.3	15.3	15.3	15.3	15.3	0.1%
<i>Total</i>	602.2	602.4	602.5	602.4	643.7	643.7	643.7	643.7	6.9%
CHERRIOTS LOCAL ON-DEMAND									
West Salem Connector	15.0	15.0	15.0	15.0	15.0	15.0	15.0	15.0	0.0%
CHERRIOTS QUALIFIED HUMAN SERVICE ORGANIZATION ROUTES									
91 - Garten Foundation	0.5	0.5	0.4	0.5	0.7	0.7	0.7	0.7	46.7%
92 - Rockwest	0.7	0.7	0.5	0.6	0.5	0.5	0.5	0.5	-17.5%
<i>Total</i>	1.2	1.2	1.0	1.1	1.2	1.2	1.2	1.2	10.0%
<i>Cherriots Local Total</i>	618.4	618.6	618.4	618.5	659.9	659.9	659.9	659.9	6.7%
CHERRIOTS EXPRESS ROUTES									
1X - Wilsonville / Salem Express	8.5	8.5	9.8	9.0	9.9	9.8	9.8	9.8	9.5%
2X - Grand Ronde / Salem Express	15.2	15.2	15.2	15.2	15.1	15.2	15.0	15.1	-0.8%
<i>Total</i>	23.7	23.7	25.0	24.2	25.0	25.0	24.8	24.9	3.0%
CARTS DEVIATED-FIXED ROUTES									
10 - Woodburn / Salem	8.5	8.4	8.4	8.4	8.5	8.6	8.5	8.5	1.3%
20 - Silverton / Salem	8.7	8.7	8.4	8.6	8.6	8.8	8.4	8.6	0.2%
30 - Canyon Connector / Salem	8.7	8.9	9.0	8.8	9.8	10.1	10.0	9.9	12.6%
40 - Polk County / Salem	9.2	9.1	9.0	9.1	10.0	9.6	9.9	9.8	8.2%
50 - Dallas / Salem Express	7.4	7.2	7.3	7.3	7.4	7.4	7.3	7.4	1.3%
<i>Total</i>	42.4	42.1	42.0	42.1	44.2	44.5	44.0	44.2	4.9%
CARTS ZONE ROUTES									
25 - North Marion Flex	7.4	7.4	7.0	7.2	7.2	7.3	7.1	7.2	-0.2%
45 - Polk Flex	14.8	15.0	14.8	14.8	14.7	15.0	14.8	14.8	0.0%
<i>Total</i>	22.1	22.3	21.8	22.0	21.9	22.3	22.0	22.0	-0.1%
CARTS DIAL-A-RIDE									
35 - Canyon Flex	4.9	5.6	5.7	5.4	5.3	3.3	4.7	4.5	-17.4%
<i>Cherriots Regional Total</i>	93.1	93.6	94.6	93.8	96.4	95.1	95.4	95.6	2.0%
SHOPPER SHUTTLE & DIAL-A-RIDE									
RED Line Dial-a-Ride	9.2	9.4	10.0	9.5	13.7	14.6	13.3	13.8	45.2%
RED Line Shopper Shuttle	6.1	6.8	7.0	6.7	6.0	6.6	7.6	6.7	1.4%
<i>Total</i>	15.3	16.2	17.0	16.2	19.6	21.2	20.9	20.6	27.2%
PARATRANSIT									
CherryLift	239.0	247.9	244.4	243.8	235.1	243.9	244.3	241.1	-1.1%

Table 3. Total Revenue Miles

Route	FY16 Q3				FY17 Q3			
	Jan 2016	Feb 2016	Mar 2016	Total	Jan 2017	Feb 2017	Mar 2017	Total
(Service Days)	20	20	23	63	21	19	23	63
CHERRIOTS LOCAL FIXED-ROUTE								
2 - Market / Brown	13,685	13,685	15,738	43,108	14,370	13,001	15,732	43,103
3 - Portland Road	7,244	7,244	8,331	22,819	7,362	6,676	8,082	22,120
4 - State Street	3,513	3,513	4,040	11,066	3,168	2,866	3,470	9,504
5,17 - Edgewater / Center (5/5A)	21,736	21,736	24,614	68,086	23,369	21,127	25,594	70,090
6,16 - Wallace / Fairview Industrial (6)	9,056	9,077	10,396	28,529	9,478	8,576	10,372	28,426
7 - Mission / State	4,099	4,099	4,714	12,912	4,304	3,894	4,714	12,912
8 - 12th / Liberty via Red Leaf	6,170	6,175	7,091	19,436	6,478	5,867	7,090	19,435
9 - Cherry / Parkmeadow (9/9A)	9,104	9,104	10,469	28,677	9,569	8,657	10,480	28,706
11 - Lancaster / Keizer	23,580	23,580	27,117	74,277	24,737	22,363	27,101	74,201
12 - Haysville	3,718	3,718	4,275	11,711	3,358	3,038	3,678	10,074
13,22 - Silvertown Road / Salem Library (13)	7,323	7,323	8,004	22,650	7,392	6,688	8,095	22,175
14 - Windsor Island	4,533	4,533	5,213	14,279	4,760	4,306	5,213	14,279
15X - Airport Rd Park & Ride Express	0	0	0	0	4,363	3,952	4,784	13,099
18 - 12th / Liberty via Lone Oak (8A)	6,273	6,273	7,213	19,759	6,586	5,959	7,213	19,758
19,21 - N River Rd / S Commercial (1)	28,781	28,781	33,086	90,648	29,066	26,301	31,828	87,195
23 - Lansing / Hawthorne (10)	3,859	3,859	4,438	12,156	4,052	3,666	4,438	12,156
24 - State / Lancaster (4A)	3,552	3,552	4,084	11,188	3,729	3,374	4,084	11,187
<i>Total</i>	156,226	156,252	178,823	491,301	166,141	150,311	181,968	498,420
CHERRIOTS LOCAL ON-DEMAND								
West Salem Connector	3,095	3,028	2,733	8,856	3,592	2,798	2,003	8,393
CHERRIOTS QUALIFIED HUMAN SERVICE ORGANIZATION ROUTES								
91 - Garten Foundation	117	117	134	368	122	110	134	366
92 - Rockwest	192	192	221	605	202	182	221	605
<i>Total</i>	309	309	355	973	324	292	355	971
<i>Cherriots Local Total</i>	159,630	159,589	181,911	501,130	170,057	153,401	184,326	507,784
CHERRIOTS EXPRESS ROUTES								
1X - Wilsonville / Salem Express	5,138	5,138	7,358	17,634	6,398	6,078	7,358	19,834
2X - Grand Ronde / Salem Express	10,485	10,485	12,058	33,028	10,878	9,961	11,927	32,766
<i>Total</i>	15,623	15,623	19,416	50,662	17,276	16,039	19,285	52,600
CARTS DEVIATED-FIXED ROUTES								
10 - Woodburn / Salem	3,344	3,349	3,847	10,540	3,498	3,206	3,885	10,589
20 - Silvertown / Salem	3,285	3,423	3,811	10,519	3,569	3,157	3,800	10,526
30 - Canyon Connector / Salem	4,953	5,011	5,812	15,776	5,150	4,545	5,691	15,386
40 - Polk County / Salem	4,072	4,024	4,639	12,735	4,323	3,757	4,730	12,810
50 - Dallas / Salem Express	2,764	2,755	3,170	8,689	2,891	2,616	3,169	8,676
<i>Total</i>	18,418	18,562	21,279	58,259	19,431	17,281	21,275	57,987
CARTS ZONE ROUTES								
25 - North Marion Flex	1,873	1,854	2,172	5,899	1,805	1,705	2,065	5,575
45 - Polk Flex	3,900	4,079	4,535	12,514	4,060	3,791	4,469	12,320
<i>Total</i>	5,773	5,933	6,707	18,413	5,865	5,496	6,534	17,895
CARTS DIAL-A-RIDE								
35 - Canyon Flex	604	586	908	2,098	605	387	895	1,887
<i>Cherriots Regional Total</i>	40,418	40,704	48,310	129,432	43,177	39,203	47,989	130,369
SHOPPER SHUTTLE & DIAL-A-RIDE								
RED Line Dial-a-Ride	2,153	2,207	2,599	6,959	3,339	3,440	3,808	10,587
RED Line Shopper Shuttle	926	970	1,265	3,161	1,137	1,232	1,411	3,780
<i>Total</i>	3,079	3,177	3,864	10,120	4,476	4,672	5,219	14,367
PARATRANSIT								
CherryLift	57,708	59,234	75,175	192,117	59,768	57,055	68,982	185,805

Table 4. Average Revenue Miles / Day

Route <small>(Service Days)</small>	FY16 Q3				FY17 Q3				Percent Change
	Jan 2016 20	Feb 2016 20	Mar 2016 23	Total 63	Jan 2017 21	Feb 2017 19	Mar 2017 23	Total 63	
CHERRIOTS LOCAL FIXED-ROUTE									
2 - Market / Brown	684.3	684.3	684.3	684.3	684.3	684.3	684.0	684.2	0.0%
3 - Portland Road	362.2	362.2	362.2	362.2	350.6	351.4	351.4	351.1	-3.1%
4 - State Street	175.7	175.7	175.7	175.7	150.9	150.8	150.9	150.9	-14.1%
5,17 - Edgewater / Center (5/5A)	1,086.8	1,086.8	1,070.2	1,080.7	1,112.8	1,111.9	1,112.8	1,112.5	2.9%
6,16 - Wallace / Fairview Industrial (6)	452.8	453.9	452.0	452.8	451.3	451.4	451.0	451.2	-0.4%
7 - Mission / State	205.0	205.0	205.0	205.0	205.0	204.9	205.0	205.0	0.0%
8 - 12th / Liberty via Red Leaf	308.5	308.8	308.3	308.5	308.5	308.8	308.3	308.5	0.0%
9 - Cherry / Parkmeadow (9/9A)	455.2	455.2	455.2	455.2	455.7	455.6	455.7	455.7	0.1%
11 - Lancaster / Keizer	1,179.0	1,179.0	1,179.0	1,179.0	1,178.0	1,177.0	1,178.3	1,177.8	-0.1%
12 - Haysville	185.9	185.9	185.9	185.9	159.9	159.9	159.9	159.9	-14.0%
13,22 - Silverton Road / Salem Library (13)	366.2	366.2	348.0	359.5	352.0	352.0	352.0	352.0	-2.1%
14 - Windsor Island	226.7	226.7	226.7	226.7	226.7	226.6	226.7	226.7	0.0%
15X - Airport Rd Park & Ride Express	N/A	N/A	N/A	N/A	207.8	208.0	208.0	207.9	N/A
18 - 12th / Liberty via Lone Oak (8A)	313.7	313.7	313.6	313.6	313.6	313.6	313.6	313.6	0.0%
19,21 - N River Rd / S Commercial (1)	1,439.1	1,439.1	1,438.5	1,438.9	1,384.1	1,384.3	1,383.8	1,384.0	-3.8%
23 - Lansing / Hawthorne (10)	193.0	193.0	193.0	193.0	193.0	192.9	193.0	193.0	0.0%
24 - State / Lancaster (4A)	177.6	177.6	177.6	177.6	177.6	177.6	177.6	177.6	0.0%
<i>Total</i>	<i>7,811.3</i>	<i>7,812.6</i>	<i>7,774.9</i>	<i>7,798.4</i>	<i>7,911.5</i>	<i>7,911.1</i>	<i>7,911.7</i>	<i>7,911.4</i>	<i>1.4%</i>
CHERRIOTS LOCAL ON-DEMAND									
West Salem Connector	154.8	151.4	118.8	140.6	171.0	147.3	87.1	133.2	-5.2%
CHERRIOTS QUALIFIED HUMAN SERVICE ORGANIZATION ROUTES									
91 - Garten Foundation	5.9	5.9	5.8	5.8	5.8	5.8	5.8	5.8	-0.5%
92 - Rockwest	9.6	9.6	9.6	9.6	9.6	9.6	9.6	9.6	0.0%
<i>Total</i>	<i>15.5</i>	<i>15.5</i>	<i>15.4</i>	<i>15.4</i>	<i>15.4</i>	<i>15.4</i>	<i>15.4</i>	<i>15.4</i>	<i>-0.2%</i>
<i>Cherriots Local Total</i>	<i>7,981.5</i>	<i>7,979.5</i>	<i>7,909.2</i>	<i>7,954.4</i>	<i>8,098.0</i>	<i>8,073.7</i>	<i>8,014.2</i>	<i>8,060.1</i>	<i>1.3%</i>
CHERRIOTS EXPRESS ROUTES									
1X - Wilsonville / Salem Express	256.9	256.9	319.9	279.9	304.7	319.9	319.9	314.8	12.5%
2X - Grand Ronde / Salem Express	524.3	524.3	524.3	524.3	518.0	524.3	518.6	520.1	-0.8%
<i>Total</i>	<i>781.2</i>	<i>781.2</i>	<i>844.2</i>	<i>804.2</i>	<i>822.7</i>	<i>844.2</i>	<i>838.5</i>	<i>834.9</i>	<i>3.8%</i>
CARTS DEVIATED-FIXED ROUTES									
10 - Woodburn / Salem	167.2	167.5	167.3	167.3	166.6	168.7	168.9	168.1	0.5%
20 - Silverton / Salem	164.3	171.2	165.7	167.0	170.0	166.2	165.2	167.1	0.1%
30 - Canyon Connector / Salem	247.7	250.6	252.7	250.4	245.2	239.2	247.4	244.2	-2.5%
40 - Polk County / Salem	203.6	201.2	201.7	202.1	205.9	197.7	205.7	203.3	0.6%
50 - Dallas / Salem Express	138.2	137.8	137.8	137.9	137.7	137.7	137.8	137.7	-0.1%
<i>Total</i>	<i>920.9</i>	<i>928.1</i>	<i>925.2</i>	<i>924.7</i>	<i>925.3</i>	<i>909.5</i>	<i>925.0</i>	<i>920.4</i>	<i>-0.5%</i>
CARTS ZONE ROUTES									
25 - North Marion Flex	93.7	92.7	94.4	93.6	86.0	89.7	89.8	88.5	-5.5%
45 - Polk Flex	195.0	204.0	197.2	198.6	193.3	199.5	194.3	195.6	-1.6%
<i>Total</i>	<i>288.7</i>	<i>296.7</i>	<i>291.6</i>	<i>292.3</i>	<i>279.3</i>	<i>289.3</i>	<i>284.1</i>	<i>284.0</i>	<i>-2.8%</i>
CARTS DIAL-A-RIDE									
35 - Canyon Flex	30.2	29.3	39.5	33.3	28.8	20.4	38.9	30.0	-10.1%
<i>Cherriots Regional Total</i>	<i>2,020.9</i>	<i>2,035.2</i>	<i>2,100.4</i>	<i>2,054.5</i>	<i>2,056.0</i>	<i>2,063.3</i>	<i>2,086.5</i>	<i>2,069.3</i>	<i>0.7%</i>
SHOPPER SHUTTLE & DIAL-A-RIDE									
RED Line Dial-a-Ride	107.7	110.4	113.0	110.5	159.0	181.1	165.6	168.0	52.1%
RED Line Shopper Shuttle	46.3	48.5	55.0	50.2	54.1	64.8	61.3	60.0	19.6%
<i>Total</i>	<i>154.0</i>	<i>158.9</i>	<i>168.0</i>	<i>160.6</i>	<i>213.1</i>	<i>245.9</i>	<i>226.9</i>	<i>228.0</i>	<i>42.0%</i>
PARATRANSIT									
CherryLift	2,885.4	2,961.7	3,268.5	3,049.5	2,846.1	3,002.9	2,999.2	2,949.3	-3.3%

Table 5. Total Boardings

Route	FY16 Q3				FY17 Q3			
	Jan 2016	Feb 2016	Mar 2016	Total	Jan 2017	Feb 2017	Mar 2017	Total
(Service Days)	20	20	23	63	21	19	23	63
CHERRIOTS LOCAL FIXED-ROUTE								
2 - Market / Brown	22,861	24,961	26,788	74,610	24,425	25,017	27,732	77,174
3 - Portland Road	12,938	15,418	18,208	46,564	14,124	13,610	16,082	43,816
4 - State Street	7,045	7,578	7,951	22,574	5,957	6,304	7,189	19,450
5,17 - Edgewater / Center (5/5A)	29,488	32,295	34,907	96,690	32,700	31,608	38,528	102,836
6,16 - Wallace / Fairview Industrial (6)	9,335	9,186	9,626	28,147	8,361	7,672	8,882	24,915
7 - Mission / State	5,381	6,025	6,790	18,196	5,067	5,015	6,066	16,148
8 - 12th / Liberty via Red Leaf	7,857	8,660	9,564	26,081	8,008	7,969	9,496	25,473
9 - Cherry / Parkmeadow (9/9A)	8,620	9,067	9,908	27,595	8,485	8,914	10,493	27,892
11 - Lancaster / Keizer	39,454	43,506	45,796	128,756	38,123	38,217	45,254	121,594
12 - Haysville	2,631	2,677	2,641	7,949	1,461	1,414	1,705	4,580
13,22 - Silverton Road / Salem Library (13)	10,492	11,947	11,733	34,172	8,948	9,319	11,240	29,507
14 - Windsor Island	1,944	2,125	2,392	6,461	1,794	1,717	1,910	5,421
15X - Airport Rd Park & Ride Express	N/A	N/A	N/A	N/A	2,371	2,551	3,117	8,039
18 - 12th / Liberty via Lone Oak (8A)	8,015	8,075	8,451	24,541	7,418	7,471	8,856	23,745
19,21 - N River Rd / S Commercial (1)	46,958	51,222	56,271	154,451	53,930	52,784	61,358	168,072
23 - Lansing / Hawthorne (10)	2,584	2,685	3,178	8,447	2,205	2,406	2,892	7,503
24 - State / Lancaster (4A)	6,898	7,131	8,352	22,381	5,749	5,537	6,576	17,862
<i>Total</i>	222,501	242,558	262,556	727,615	229,126	227,525	267,376	724,027
CHERRIOTS LOCAL ON-DEMAND								
West Salem Connector	830	955	1,065	2,850	1,198	1,177	1,324	3,699
CHERRIOTS QUALIFIED HUMAN SERVICE ORGANIZATION ROUTES								
91 - Garten Foundation	1,298	313	372	1,983	210	203	279	692
92 - Rockwest	589	460	450	1,499	317	339	410	1,066
<i>Total</i>	1,887	773	822	3,482	527	542	689	1,758
<i>Cherriots Local Total</i>	225,218	244,286	264,443	733,947	230,851	229,244	269,389	729,484
CHERRIOTS EXPRESS ROUTES								
1X - Wilsonville / Salem Express	2,703	2,858	3,326	8,887	2,646	2,721	3,270	8,637
2X - Grand Ronde / Salem Express	1,578	1,706	1,826	5,110	1,292	1,342	1,651	4,285
<i>Total</i>	4,281	4,564	5,152	13,997	3,938	4,063	4,921	12,922
CARTS DEVIATED-FIXED ROUTES								
10 - Woodburn / Salem	911	1,042	1,134	3,087	884	821	1,036	2,741
20 - Silverton / Salem	1,064	1,180	1,323	3,567	880	829	979	2,688
30 - Canyon Connector / Salem	1,150	1,273	1,307	3,730	1,078	1,049	1,110	3,237
40 - Polk County / Salem	1,827	1,994	2,289	6,110	1,655	1,679	1,908	5,242
50 - Dallas / Salem Express	1,399	1,581	1,658	4,638	1,185	1,305	1,291	3,781
<i>Total</i>	6,351	7,070	7,711	21,132	5,682	5,683	6,324	17,689
CARTS ZONE ROUTES								
25 - North Marion Flex	102	167	169	438	134	112	169	415
45 - Polk Flex	1,729	1,856	2,021	5,606	1,637	1,685	1,953	5,275
<i>Total</i>	1,831	2,023	2,190	6,044	1,771	1,797	2,122	5,690
CARTS DIAL-A-RIDE								
35 - Canyon Flex	94	117	136	347	79	53	93	225
<i>Cherriots Regional Total</i>	12,557	13,774	15,189	41,520	11,470	11,596	13,460	36,526
SHOPPER SHUTTLE & DIAL-A-RIDE								
RED Line Dial-a-Ride	270	330	384	984	450	475	544	1,469
RED Line Shopper Shuttle	297	302	398	997	334	352	396	1,082
<i>Total</i>	567	632	782	1,981	784	827	940	2,551
PARATRANSIT								
CherryLift	11,467	12,017	13,161	36,645	11,070	10,750	12,727	34,547

Table 6. Average Boardings / Day

Route (Service Days)	FY16 Q3				FY17 Q3				Percent Change
	Jan 2016 20	Feb 2016 20	Mar 2016 23	Total 63	Jan 2017 21	Feb 2017 19	Mar 2017 23	Total 63	
CHERRIOTS LOCAL FIXED-ROUTE									
2 - Market / Brown	1,143.1	1,248.1	1,164.7	1,184.3	1,163.1	1,316.7	1,205.7	1,225.0	3.4%
3 - Portland Road	646.9	770.9	791.7	739.1	672.6	716.3	699.2	695.5	-5.9%
4 - State Street	352.3	378.9	345.7	358.3	283.7	331.8	312.6	308.7	-13.8%
5,17 - Edgewater / Center (5/5A)	1,474.4	1,614.8	1,517.7	1,534.8	1,557.1	1,663.6	1,675.1	1,632.3	6.4%
6,16 - Wallace / Fairview Industrial (6)	466.8	459.3	418.5	446.8	398.1	403.8	386.2	395.5	-11.5%
7 - Mission / State	269.1	301.3	295.2	288.8	241.3	263.9	263.7	256.3	-11.3%
8 - 12th / Liberty via Red Leaf	392.9	433.0	415.8	414.0	381.3	419.4	412.9	404.3	-2.3%
9 - Cherry / Parkmeadow (9/9A)	431.0	453.4	430.8	438.0	404.0	469.2	456.2	442.7	1.1%
11 - Lancaster / Keizer	1,972.7	2,175.3	1,991.1	2,043.7	1,815.4	2,011.4	1,967.6	1,930.1	-5.6%
12 - Haysville	131.6	133.9	114.8	126.2	69.6	74.4	74.1	72.7	-42.4%
13,22 - Silverton Road / Salem Library (13)	524.6	597.4	510.1	542.4	426.1	490.5	488.7	468.4	-13.7%
14 - Windsor Island	97.2	106.3	104.0	102.6	85.4	90.4	83.0	86.0	-16.1%
15X - Airport Rd Park & Ride Express	N/A	N/A	N/A	N/A	112.9	134.3	135.5	127.6	N/A
18 - 12th / Liberty via Lone Oak (8A)	400.8	403.8	367.4	389.5	353.2	393.2	385.0	376.9	-3.2%
19,21 - N River Rd / S Commercial (1)	2,347.9	2,561.1	2,446.6	2,451.6	2,568.1	2,778.1	2,667.7	2,667.8	8.8%
23 - Lansing / Hawthorne (10)	129.2	134.3	138.2	134.1	105.0	126.6	125.7	119.1	-11.2%
24 - State / Lancaster (4A)	344.9	356.6	363.1	355.3	273.8	291.4	285.9	283.5	-20.2%
<i>Total</i>	<i>11,125.1</i>	<i>12,127.9</i>	<i>11,415.5</i>	<i>11,549.4</i>	<i>10,910.8</i>	<i>11,975.0</i>	<i>11,625.0</i>	<i>11,492.5</i>	<i>-0.5%</i>
CHERRIOTS LOCAL ON-DEMAND									
West Salem Connector	41.5	47.8	46.3	45.2	57.0	61.9	57.6	58.7	29.8%
CHERRIOTS QUALIFIED HUMAN SERVICE ORGANIZATION ROUTES									
91 - Garten Foundation	64.9	15.7	16.2	31.5	10.0	10.7	12.1	11.0	-65.1%
92 - Rockwest	29.5	23.0	19.6	23.8	15.1	17.8	17.8	16.9	-28.9%
<i>Total</i>	<i>94.4</i>	<i>38.7</i>	<i>35.7</i>	<i>55.3</i>	<i>25.1</i>	<i>28.5</i>	<i>30.0</i>	<i>27.9</i>	<i>-49.5%</i>
<i>Cherriots Local Total</i>	<i>11,260.9</i>	<i>12,214.3</i>	<i>11,497.5</i>	<i>11,650.0</i>	<i>10,992.9</i>	<i>12,065.5</i>	<i>11,712.6</i>	<i>11,579.1</i>	<i>-0.6%</i>
CHERRIOTS EXPRESS ROUTES									
1X - Wilsonville / Salem Express	135.2	142.9	144.6	141.1	126.0	143.2	142.2	137.1	-2.8%
2X - Grand Ronde / Salem Express	78.9	85.3	79.4	81.1	61.5	70.6	71.8	68.0	-16.1%
<i>Total</i>	<i>214.1</i>	<i>228.2</i>	<i>224.0</i>	<i>222.2</i>	<i>187.5</i>	<i>213.8</i>	<i>214.0</i>	<i>205.1</i>	<i>-7.7%</i>
CARTS DEVIATED-FIXED ROUTES									
10 - Woodburn / Salem	45.6	52.1	49.3	49.0	42.1	43.2	45.0	43.5	-11.2%
20 - Silverton / Salem	53.2	59.0	57.5	56.6	41.9	43.6	42.6	42.7	-24.6%
30 - Canyon Connector / Salem	57.5	63.7	56.8	59.2	51.3	55.2	48.3	51.4	-13.2%
40 - Polk County / Salem	91.4	99.7	99.5	97.0	78.8	88.4	83.0	83.2	-14.2%
50 - Dallas / Salem Express	70.0	79.1	72.1	73.6	56.4	68.7	56.1	60.0	-18.5%
<i>Total</i>	<i>317.6</i>	<i>353.5</i>	<i>335.3</i>	<i>335.4</i>	<i>270.6</i>	<i>299.1</i>	<i>275.0</i>	<i>280.8</i>	<i>-16.3%</i>
CARTS ZONE ROUTES									
25 - North Marion Flex	5.1	8.4	7.3	7.0	6.4	5.9	7.3	6.6	-5.3%
45 - Polk Flex	86.5	92.8	87.9	89.0	78.0	88.7	84.9	83.7	-5.9%
<i>Total</i>	<i>91.6</i>	<i>101.2</i>	<i>95.2</i>	<i>95.9</i>	<i>84.3</i>	<i>94.6</i>	<i>92.3</i>	<i>90.3</i>	<i>-5.9%</i>
CARTS DIAL-A-RIDE									
35 - Canyon Flex	4.7	5.9	5.9	5.5	3.8	2.8	4.0	3.6	-35.2%
<i>Cherriots Regional Total</i>	<i>627.9</i>	<i>688.7</i>	<i>660.4</i>	<i>659.0</i>	<i>546.2</i>	<i>610.3</i>	<i>585.2</i>	<i>579.8</i>	<i>-12.0%</i>
SHOPPER SHUTTLE & DIAL-A-RIDE									
RED Line Dial-a-Ride	13.5	16.5	16.7	15.6	21.4	25.0	23.7	23.3	49.3%
RED Line Shopper Shuttle	14.9	15.1	17.3	15.8	15.9	18.5	17.2	17.2	8.5%
<i>Total</i>	<i>28.4</i>	<i>31.6</i>	<i>34.0</i>	<i>31.4</i>	<i>37.3</i>	<i>43.5</i>	<i>40.9</i>	<i>40.5</i>	<i>28.8%</i>
PARATRANSIT									
CherryLift	573.4	600.9	572.2	581.7	527.1	565.8	553.3	548.4	-5.7%

Table 7. Average Boardings / Revenue Hour

Route <small>(Service Days)</small>	FY16 Q3				FY17 Q3				Percent Change
	Jan 2016 20	Feb 2016 20	Mar 2016 23	Total 63	Jan 2017 21	Feb 2017 19	Mar 2017 23	Total 63	
CHERRIOTS LOCAL FIXED-ROUTE									
2 - Market / Brown	21.1	23.0	21.5	21.8	21.5	24.3	22.3	22.6	3.6%
3 - Portland Road	21.4	25.4	26.2	24.4	22.5	23.9	23.3	23.2	-5.0%
4 - State Street	23.0	24.8	22.6	23.4	18.6	21.7	20.4	20.2	-13.8%
5,17 - Edgewater / Center (5/5A)	16.0	17.5	16.5	16.7	14.8	15.8	15.9	15.5	-7.0%
6,16 - Wallace / Fairview Industrial (6)	14.4	14.1	12.9	13.7	12.4	12.6	12.0	12.3	-10.3%
7 - Mission / State	17.2	19.3	18.9	18.5	15.4	16.9	16.9	16.4	-11.3%
8 - 12th / Liberty via Red Leaf	17.0	18.7	18.0	17.9	16.5	18.1	17.9	17.5	-2.2%
9 - Cherry / Parkmeadow (9/9A)	14.0	14.8	14.0	14.3	13.1	15.2	14.8	14.4	0.8%
11 - Lancaster / Keizer	22.4	24.6	22.6	23.2	20.2	22.3	21.9	21.4	-7.4%
12 - Haysville	8.5	8.7	7.4	8.2	4.7	5.0	5.0	4.9	-40.1%
13,22 - Silverton Road / Salem Library (13)	17.3	19.7	16.7	17.9	13.9	16.0	15.9	15.3	-14.5%
14 - Windsor Island	6.4	7.0	6.8	6.7	5.6	5.9	5.4	5.6	-16.8%
15X - Airport Rd Park & Ride Express	N/A	N/A	N/A	N/A	5.6	6.7	6.7	6.3	N/A
18 - 12th / Liberty via Lone Oak (8A)	17.5	17.6	16.0	17.0	15.4	17.1	16.8	16.4	-3.3%
19,21 - N River Rd / S Commercial (1)	22.1	24.1	23.1	23.1	22.7	24.5	23.6	23.6	1.9%
23 - Lansing / Hawthorne (10)	8.6	9.0	9.2	8.9	7.0	8.5	8.4	8.0	-10.6%
24 - State / Lancaster (4A)	22.6	23.4	23.8	23.3	17.9	19.1	18.7	18.6	-20.3%
<i>Total</i>	18.5	20.1	18.9	19.2	17.0	18.6	18.1	17.9	-6.9%
CHERRIOTS LOCAL ON-DEMAND									
West Salem Connector	2.8	3.2	3.1	3.0	3.8	4.1	3.8	3.9	29.8%
CHERRIOTS QUALIFIED HUMAN SERVICE ORGANIZATION ROUTES									
91 - Garten Foundation	129.8	31.3	37.2	66.1	14.0	15.6	17.4	15.7	-76.2%
92 - Rockwest	42.1	32.9	37.5	37.5	28.8	33.9	34.2	32.3	-13.8%
<i>Total</i>	78.6	32.2	37.4	49.7	20.3	23.6	24.6	22.8	-54.1%
<i>Cherriots Local Total</i>	18.2	19.7	18.6	18.8	16.7	18.3	17.7	17.5	-6.9%
CHERRIOTS EXPRESS ROUTES									
1X - Wilsonville / Salem Express	15.9	16.8	14.7	15.7	12.8	14.6	14.5	13.9	-11.3%
2X - Grand Ronde / Salem Express	5.2	5.6	5.2	5.3	4.1	4.7	4.8	4.5	-15.4%
<i>Total</i>	9.0	9.6	8.9	9.2	7.5	8.6	8.6	8.2	-10.4%
CARTS DEVIATED-FIXED ROUTES									
10 - Woodburn / Salem	5.4	6.2	5.9	5.8	5.0	5.0	5.3	5.1	-12.4%
20 - Silverton / Salem	6.2	6.8	6.8	6.6	4.9	4.9	5.1	5.0	-24.8%
30 - Canyon Connector / Salem	6.6	7.2	6.3	6.7	5.2	5.5	4.8	5.2	-22.9%
40 - Polk County / Salem	9.9	11.0	11.1	10.7	7.9	9.2	8.4	8.5	-20.7%
50 - Dallas / Salem Express	9.5	11.1	9.9	10.1	7.6	9.3	7.7	8.1	-19.5%
<i>Total</i>	7.5	8.4	8.0	8.0	6.1	6.7	6.2	6.3	-20.2%
CARTS ZONE ROUTES									
25 - North Marion Flex	0.7	1.1	1.0	1.0	0.9	0.8	1.0	0.9	-5.0%
45 - Polk Flex	5.9	6.2	5.9	6.0	5.3	5.9	5.7	5.6	-5.9%
<i>Total</i>	4.1	4.5	4.4	4.4	3.9	4.2	4.2	4.1	-5.8%
CARTS DIAL-A-RIDE									
35 - Canyon Flex	4.7	5.9	5.9	5.5	3.8	2.8	4.0	3.6	-35.2%
<i>Cherriots Regional Total</i>	6.7	7.4	7.0	7.0	5.7	6.4	6.1	6.1	-13.7%
SHOPPER SHUTTLE & DIAL-A-RIDE									
RED Line Dial-a-Ride	1.5	1.8	1.7	1.6	1.6	1.7	1.8	1.7	2.8%
RED Line Shopper Shuttle	2.5	2.2	2.5	2.4	2.7	2.8	2.3	2.5	7.0%
<i>Total</i>	1.9	2.0	2.0	1.9	1.9	2.1	2.0	2.0	1.3%
PARATRANSIT									
CherryLift	2.4	2.4	2.3	2.4	2.2	2.3	2.3	2.3	-4.7%

Table 8. Total Boardings using State Bus Pass Program

Route	FY17 Q3			
	Jan 2017	Feb 2017	Mar 2017	Total
(Service Days)	21	19	23	63
CHERRIOTS LOCAL FIXED-ROUTE				
2 - Market / Brown	442	441	491	1,374
3 - Portland Road	458	447	538	1,443
4 - State Street	112	121	139	372
5,17 - Edgewater / Center (5/5A)	748	749	921	2,418
6,16 - Wallace / Fairview Industrial (6)	325	319	345	989
7 - Mission / State	52	48	83	183
8 - 12th / Liberty via Red Leaf	323	304	418	1,045
9 - Cherry / Parkmeadow (9/9A)	328	437	520	1,285
11 - Lancaster / Keizer	63	69	58	190
12 - Haysville	1	2	5	8
13,22 - Silverton Road / Salem Library (13)	134	157	242	533
14 - Windsor Island	3	1	0	4
15X - Airport Rd Park & Ride Express	1,393	1,535	1,870	4,798
18 - 12th / Liberty via Lone Oak (8A)	348	393	502	1,243
19,21 - N River Rd / S Commercial (1)	1,068	1,052	1,264	3,384
23 - Lansing / Hawthorne	9	18	32	59
24 - State / Lancaster (4A)	61	41	29	131
<i>Total</i>	5,868	6,134	7,457	19,459
CHERRIOTS LOCAL ON-DEMAND				
West Salem Connector	0	0	0	0
CHERRIOTS EXPRESS ROUTES				
1X - Wilsonville / Salem Express	1,370	1,412	1,779	4,561
<i>Total</i>	7,238	7,546	9,236	24,020
% of System Boardings	3.1%	3.3%	3.4%	3.3%

Table 9. Average Boardings / Day using State Bus Pass Program

Route	FY17 Q3			
	Jan 2017	Feb 2017	Mar 2017	Total
(Service Days)	21	19	23	63
CHERRIOTS LOCAL FIXED-ROUTE				
2 - Market / Brown	21.0	23.2	21.3	21.8
3 - Portland Road	21.8	23.5	23.4	22.9
4 - State Street	5.3	6.4	6.0	5.9
5,17 - Edgewater / Center (5/5A)	35.6	39.4	40.0	38.4
6,16 - Wallace / Fairview Industrial (6)	15.5	16.8	15.0	15.7
7 - Mission / State	2.5	2.5	3.6	2.9
8 - 12th / Liberty via Red Leaf	15.4	16.0	18.2	16.6
9 - Cherry / Parkmeadow (9/9A)	15.6	23.0	22.6	20.4
11 - Lancaster / Keizer	3.0	3.6	2.5	3.0
12 - Haysville	0.0	0.1	0.2	0.1
13,22 - Silverton Road / Salem Library (13)	6.4	8.3	10.5	8.5
14 - Windsor Island	0.1	0.1	0.0	0.1
15X - Airport Rd Park & Ride Express	66.3	80.8	81.3	76.2
18 - 12th / Liberty via Lone Oak (8A)	16.6	20.7	21.8	19.7
19,21 - N River Rd / S Commercial (1)	50.9	55.4	55.0	53.7
23 - Lansing / Hawthorne	0.4	0.9	1.4	0.9
24 - State / Lancaster (4A)	2.9	2.2	1.3	2.1
<i>Total</i>	279.4	322.8	324.2	308.9
CHERRIOTS LOCAL ON-DEMAND				
West Salem Connector	0.0	0.0	0.0	0.0
CHERRIOTS EXPRESS ROUTES				
1X - Wilsonville / Salem Express	65.2	74.3	77.3	72.4
<i>Total</i>	344.7	397.2	401.6	381.3

Table 10. State Bus Pass Program Share of Boardings and Customer Comments

	Jun 2016	Jul 2016	Aug 2016	Sept 2016	Oct 2016	Nov 2016	Dec 2016	Jan 2017	Feb 2017	Mar 2017	Apr 2017	May 2017	June 2017	Total
(Service Days)	22	20	23	21	21	20	21	21	19	23	TBD	TBD	TBD	211
BOARDINGS USING STATE BUS PASS														<i>Total</i>
1X - Wilsonville / Salem Express	1,288	1,344	1,518	1,510	1,567	1,310	1,153	1,370	1,412	1,779	TBD	TBD	TBD	14,251
15X - Airport Rd Park & Ride Express	455	711	1,061	888	993	849	827	1,393	1,535	1,870	TBD	TBD	TBD	10,582
All Other Routes	2,275	3,298	4,258	3,654	3,893	3,794	4,248	4,475	4,599	5,587	TBD	TBD	TBD	40,081
<i>Total</i>	<i>4,018</i>	<i>5,353</i>	<i>6,837</i>	<i>6,052</i>	<i>6,453</i>	<i>5,953</i>	<i>6,228</i>	<i>7,238</i>	<i>7,546</i>	<i>9,236</i>	<i>TBD</i>	<i>TBD</i>	<i>TBD</i>	<i>64,914</i>
BOARDINGS USING STATE BUS PASS / DAY														<i>Average</i>
1X - Wilsonville / Salem Express	58.5	67.2	66.0	71.9	74.6	65.5	54.9	65.2	74.3	77.3	TBD	TBD	TBD	67.5
15X - Airport Rd Park & Ride Express	20.7	35.6	46.1	42.3	47.3	42.5	39.4	66.3	80.8	81.3	TBD	TBD	TBD	50.2
All Other Routes	103.4	164.9	185.1	174.0	185.4	189.7	202.3	213.1	242.1	242.9	TBD	TBD	TBD	190.0
<i>Total</i>	<i>182.6</i>	<i>267.7</i>	<i>297.3</i>	<i>288.2</i>	<i>307.3</i>	<i>297.7</i>	<i>296.6</i>	<i>344.7</i>	<i>397.2</i>	<i>401.6</i>	<i>TBD</i>	<i>TBD</i>	<i>TBD</i>	<i>307.6</i>
SHARE OF BOARDINGS USING STATE BUS PASS PROGRAM														<i>Average</i>
1X - Wilsonville / Salem Express	32%	25%	22%	25%	24%	22%	19%	19%	19%	19%	TBD	TBD	TBD	22%
15X - Airport Rd Park & Ride Express	11%	13%	16%	15%	15%	14%	13%	19%	20%	20%	TBD	TBD	TBD	16%
All Other Routes	57%	62%	62%	60%	60%	64%	68%	62%	61%	60%	TBD	TBD	TBD	62%
<i>Total</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>	<i>TBD</i>	<i>TBD</i>	<i>TBD</i>	<i>100%</i>
COMMENTS														<i>Total</i>
Complaints	0	0	0	0	0	0	0	0	0	0	TBD	TBD	TBD	0
Compliments	0	0	0	0	0	0	0	0	0	0	TBD	TBD	TBD	0

Table 11. Route 15X

Route	FY17 Q3			
	<i>Jan 2017</i>	<i>Feb 2017</i>	<i>Mar 2017</i>	<i>Total / Average</i>
(Service Days)	21	19	23	63
Total Boardings	2,371	2,551	3,117	8,039
Average Boardings / Day	112.9	134.3	135.5	127.6
Average Boardings / Hour	5.6	6.7	6.7	6.3

MEMO TO: BOARD OF DIRECTORS
FROM: ALLAN POLLOCK, GENERAL MANAGER
SUBJECT: BOARD MEMBER COMMITTEE REPORT

Issue

Shall the Board report on their committee participation and meetings attended?

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. After these meetings, public hearings, or other activities attended by individual members on behalf of SAMTD, time will be scheduled for an oral report/update. The following activities have designated board member representation:

<u>Board/Committee</u>	<u>Director(s)</u>
Special Transportation Fund Advisory Committee (STFAC)	Director Hammill Alternate: Director Thompson
Mid-Willamette Area Commission on Transportation (MWACT)	Director Kelley Alternate: Director Lincoln
Mid-Willamette Valley Council of Governments (MWVCOG)	Director Thompson Alternate: President Krebs
Salem-Keizer Area Transportation Study Policy Committee (SKATS)	President Krebs Alternate: Director Busch
Oregon Metropolitan Planning Organization Consortium (OMPOC)	President Krebs Alternate: Director Busch

Financial Impact

None

Recommendation

Receive and File

Proposed Motion

None

MEMO TO: BOARD OF DIRECTORS
FROM: ALLAN POLLOCK, GENERAL MANAGER
SUBJECT: BOARD MEMBER COMMITTEE REPORT

Issue

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Salem-Keizer Area Transportation Study Policy Committee (SKATS)	President Krebs Alternate: Director Busch
Oregon Metropolitan Planning Organization Consortium (OMPOC)	President Krebs Alternate: Director Busch

Financial Impact

None

Recommendation

Receive and File

Proposed Motion

None

Salem Area Mass Transit District
Board of Directors

~ **WORK SESSION** ~

April 10, 2017

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

MINUTES

PRESENT: Directors John Hammill, Steve Evans, Kathy Lincoln, Marcia Kelley, and Colleen Busch
Board **ABSENT:** President Bob Krebs and Director Jerry Thompson

Staff Allan Pollock, General Manager; David Trimble, Chief Operating Officer; Patricia Feeny, Director of Communication; Paula Dixon, Director of Administration; Linda Galeazzi, Executive Assistant; Ted Stonecliffe, Long Range Planning Analyst; Chris French, Senior Planner; Lorna Adkins, Marketing Coordinator; Chip Colby, Information Technology Manager; Wendy Feth, Accountant; and Susie Primmer, Technology Services Support Analyst

Guests Citizen, Mark Knecht

1. CALL TO ORDER 5:30 PM

President Bob Krebs called the work session to order.

2. DISCUSSION

a. Service Change Updates for January and May 2017 5:30 PM

Staff report: Pages 1-14 of the agenda

Presenter: Chris French, Senior Planner

The Board was apprised of the results of feedback received in February after the January 2017 service changes. Feedback from riders, customer service staff and transit operators was largely positive. On-time performance checks had also been conducted in March at the Downtown Transit Center on all routes. Routes were considered “on time” if buses arrived up to five minutes past their scheduled arrival time at the Downtown Transit Center.

Board members reviewed the service changes to occur on May 8, 2017 –

- Route 12/Hayesville will extend farther south forming a one-way loop on 45th Avenue, Silverton Road, Lancaster Drive, Winema Place, South Campus Loop, and

Fire Protection Way to give riders easier access to stores along the Silverton Road and Lancaster Drive, and easier access and transfers to and from Chemeketa Community College.

- Bus parking changes will occur at the Downtown Transit Center; and the
- Cherriots Regional service will launch with new express routes to replace the deviated-fixed routes.

During a question and answer period, discussion ensued about the length of time scheduled for layovers, how the weather affects the schedule and what it means for a bus to run “hot.” There were questions about the completion of the signalization project at Keizer Transit Center. Staff advised that the District’s master plan includes a project manager to coordinate with the city on projects such as one on Lancaster Drive where a pilot project is being considered to relieve congestion.

Follow-up: Planning staff will get an answer for Director Kelley regarding passengers having to wait in the dark during the winter season at a Chemeketa Community College stop. Staff will continue to update the Board on additional service changes. The next one will take place on September 5, 2017.

b. Route 2X Grand Ronde Express Service and Funding Update

5:55 PM

Staff report: Pages 15-18 of the agenda

Presenter: Steve Dickey, Director of Transportation Development

Mr. Dickey reported that Cherriots’ as the contractor provided for the operation of Route 2X/Grand Ronde Express since 2009. The route was paid for by the Confederated Tribes of Grand Ronde (CTGR) to address the casino’s employee retention issues when fuel prices were high. Since then, ridership dropped by 27% over the last three years.

An evaluation of the District’s operational costs in comparison to revenue received from the CTGR was conducted to prepare for a service renewal contract. It was discovered that CTGR revenue covered only 59% of the fully allocated cost of operations. It was also clear that the District could not continue to subsidize Route 2X in the future at an annual fully allocated cost of \$180,600. Kim Rodgers, the CTGR Planning & Grants Development Manager received options from the District for consideration to address the cost coverage. If a solution cannot be reached by the beginning of May 2017, the District will need to make an independent decision from the options presented to address the budget and scheduling impacts.

Follow-up: The District will continue to operate the 2X service at its current level through August 2017. A change will be implemented with the September bid cycle to address the cost overage unless a mutually acceptable solution is agreed upon between the CTGR and the District.

c. Fare Analysis Update

6:20 PM

Staff report: Pages 19-22 of the agenda

Presenter: Ted Stonecliffe, Long Range Planning Analyst

At the Board's direction, staff evaluates fares every two years. District staff proposed a change to the evaluation process. A fare analysis was done prior to January 2017. Staff concluded a fare change may not be beneficial to the District during the current cycle. The new evaluation process would begin in September 2017. Changes to the Cherriots system will have stabilized, resulting in ridership increases. The farebox ratio will improve which reduces the cost per boarding. Implementation of any potential fare change would occur in July 2018. A level of complication for annual budget revenue projections would be eliminated and potential fare changes could be coordinated with the annual budget cycle. With consistent, stable data, the Board will have a better basis to make decisions about the fares.

Follow-up: Staff provided a proposed fare change calendar on page 22 that showed a summary of steps that would lead to any potential changes in fares effective July 1, 2018.

d. Advertising RFP

6:30 PM

Staff report: Pages 23-24 of the agenda

Presenter: Lorna Adkins, Marketing Coordinator

Ms. Adkins reported that the District received two proposal after extending the RFP deadline of March 21 to March 31, and then to April 7 to provide additional information to one interested vendor; and finally to April 12, 2017. There were 19 hits on the State's ORPIN site. The District's former vendor for bus advertising did not respond.

In the discussion among Board members, disappointment was expressed at the weak response. There were suggestions about advertising the RFP through other sites like public relations associations in Portland and through the Chamber of Commerce where the District is a member. Lots of people don't go to ORPIN except those in government. It is not a natural place to look for advertising RFPs. Staff advised that they reached out to other parties.

Follow-up: The District will present a formal recommendation at the April 27 Board meeting after the April 12 RFP submittal deadline when staff reviews the proposals submitted.

e. Continued Strategic Planning Discussion

6:37 PM

Staff report: Pages 25-34 of the agenda

Presenter: Allan Pollock, General Manager

Board members reviewed the updated strategic priorities in Attachment A and B on pages 27-32 of the agenda. Directors Lincoln and Hammill submitted written comments.

3. GENERAL MANAGER COMMENTS

6:53 PM

Staff report: Pages 35-40 the agenda

Presenter: Allan Pollock, General Manager

Time was spent reviewing the draft agenda for the March 23rd board meeting, the Board's calendar, the budget process, monthly talking points and upcoming agenda items that will be brought to the Board for their consideration.

Board members will attend Transit Day at the Capitol on April 11, 2017. Kick off starts at 8:00 a.m. with 11 visits scheduled to speak with local legislators about District needs and priorities. Board members will then meet as a small group with the District's legislative advocate at the end of their visits.

4. WORK SESSION ADJOURNED

7:10 PM

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

Salem Area Mass Transit District Board of Directors

Thursday, May 25, 2017

- **6:30 PM Regular Board Meeting**

SPECIAL ACCOMODATIONS

The facility used for this meeting is wheelchair accessible.

If you require any special physical or language accommodations, including alternative formats or printed materials, please contact SKT's Administration Office as far in advance of the meeting as possible and no later than 48 hours prior to the meeting.

Please direct your request to the Clerk of the Board at

- (503)588-2424 (voice) or
- 7-1-1 through *Oregon Relay* for persons with hearing impairments.

MEETING PROCEDURE FOR PUBLIC COMMENT

APPEARANCE OF INTERESTED CITIZENS & AGENCIES:

- Time is designated on the regular Board meeting agenda for Public Comments. It is a time for questions or testimony by persons in the audience on any items of Board business, including those items appearing on the agenda which are subject to public hearing.
- Individual citizens will be invited to come forward in a manner similar to that prescribed for public hearings and make any statement they wish, being limited to three (3) minutes.
- Any member of any agency wishing to make statements should submit their information to the Board staff per the agenda deadline.
- At the designated meeting, an agency representative will be invited to come forward to speak for a limit of five (5) minutes on their item.

Salem-Keizer Transit

Guiding Principles



Vision

Making a positive difference by enhancing community livability through innovative, sustainable regional transportation options

Mission

Connecting people with places through safe, friendly, and reliable public transportation services

Values

Safety • Service Excellence • Communication • Innovation • Accountability



Salem-Keizer Transit

Strategic Priorities for Fiscal Year 2017



Provide an exceptional transportation experience

- Conduct a fare analysis
- Complete bus stop improvement project
- Conduct a rider and origin & destination survey
- Conduct a community and attitude awareness survey
- Conduct a customer education campaign

Be an employer of choice

- Implement a wellness campaign
- Implement a "Safety First" campaign
- Develop a "Service Excellence" campaign

Partner with the Community

- Develop a communications plan
- Implement second year of Cherriots Rideshare strategic plan

Ensure organizational viability

- Develop a service planning and core network policy
- Conduct FTA required 100% ridecheck
- Implement HR/Finance software package
- Develop intelligent transportation system master plan

Improve and promote environmental sustainability

- Reestablish District sustainability committee

Improve connectivity

- Update of strategic plan
- Develop Regional Service Plan
- Complete Keizer Transit Center signalized intersection



**Connecting people with places
through safe, friendly, and reliable
public transportation services**



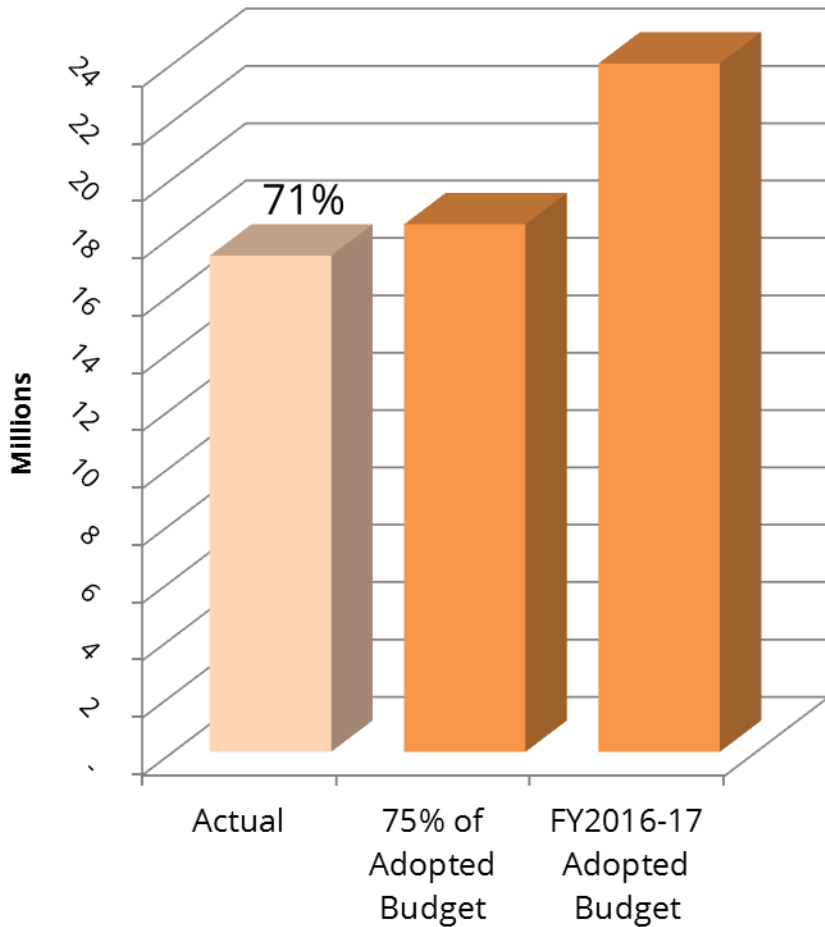
555 Court St NE, Suite 5230, Salem, OR 97301 | 503-588-2424 PH 503-566-3933 FAX | Cherriots.org



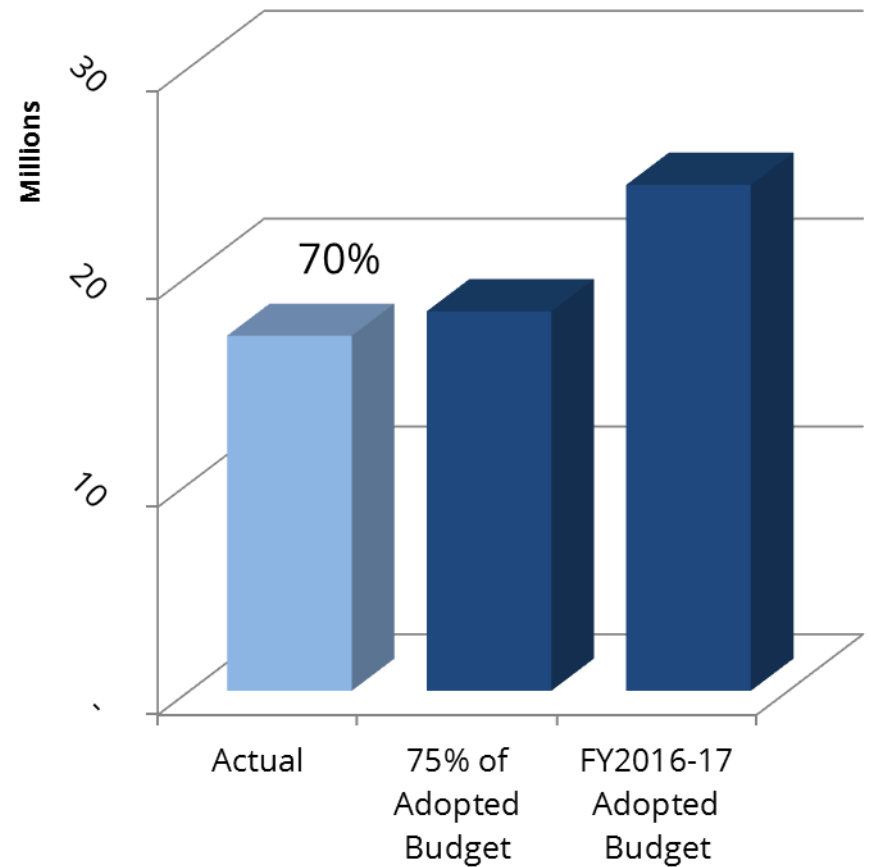
**Third Quarter Financial Report
January 31, 2017 - March 31, 2017**

General Fund Budget and Actual on a Non-GAAP Budget Basis (unaudited)

Revenues/Resources Total

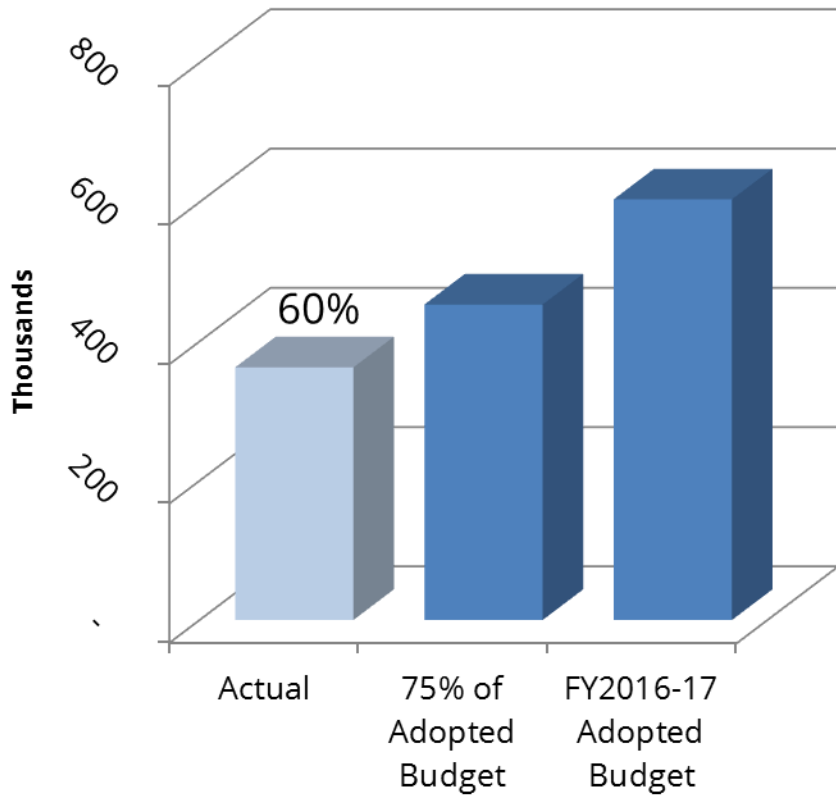


General Fund Expenses/Requirements Total

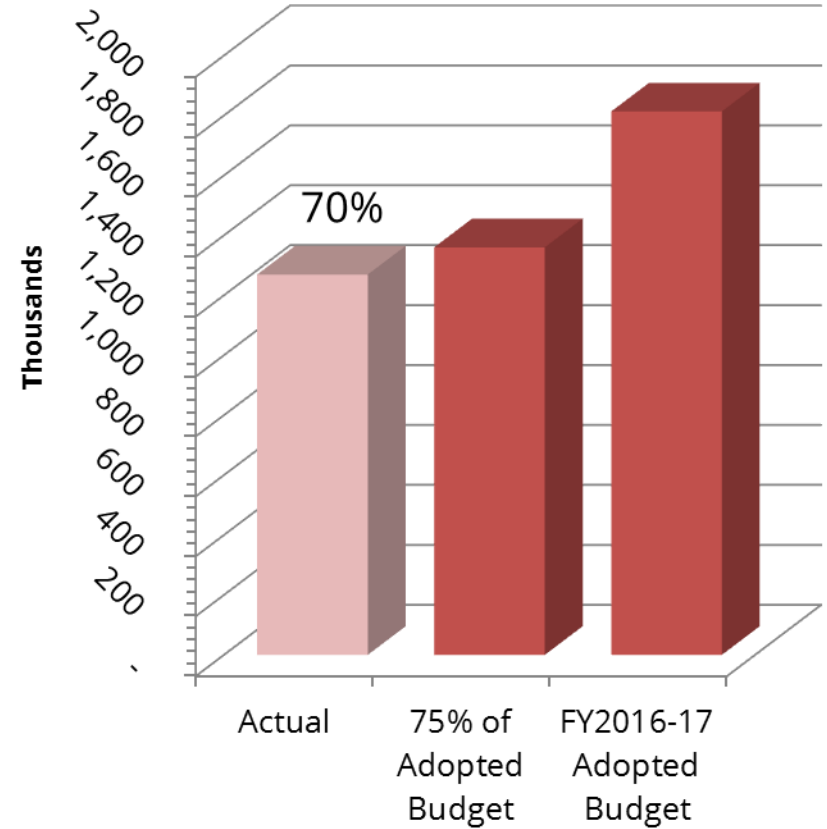


General Fund Budget and Actual on a Non-GAAP Budget Basis (unaudited)

General Manager/Board of Directors

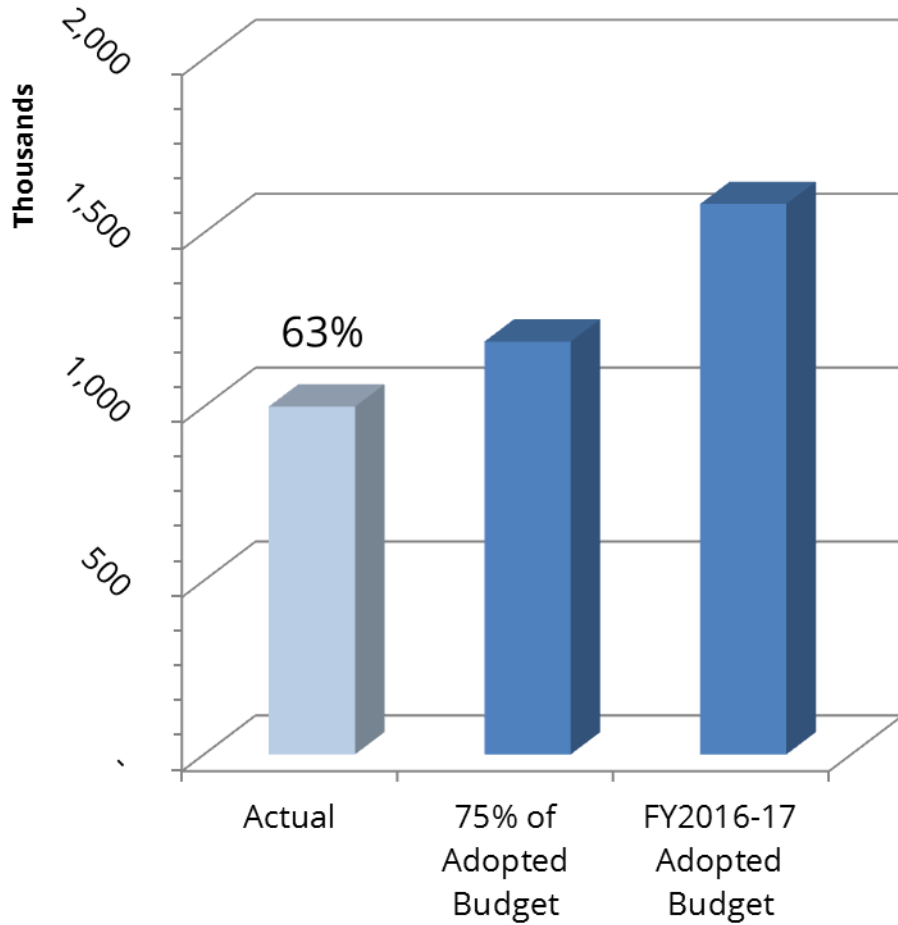


Administration

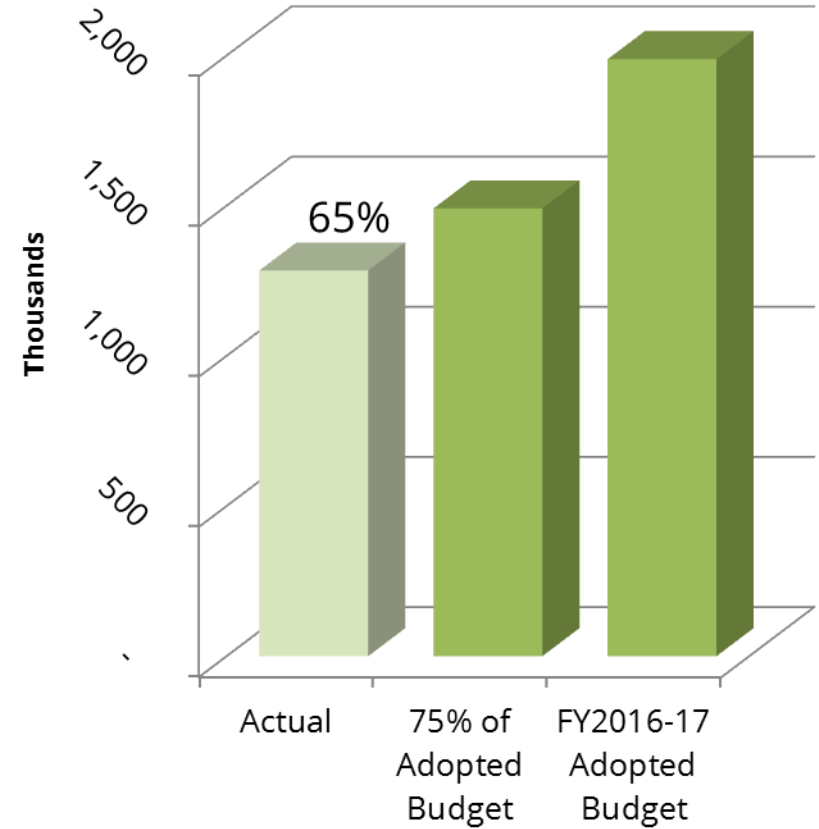


General Fund Budget and Actual on a Non-GAAP Budget Basis (unaudited)

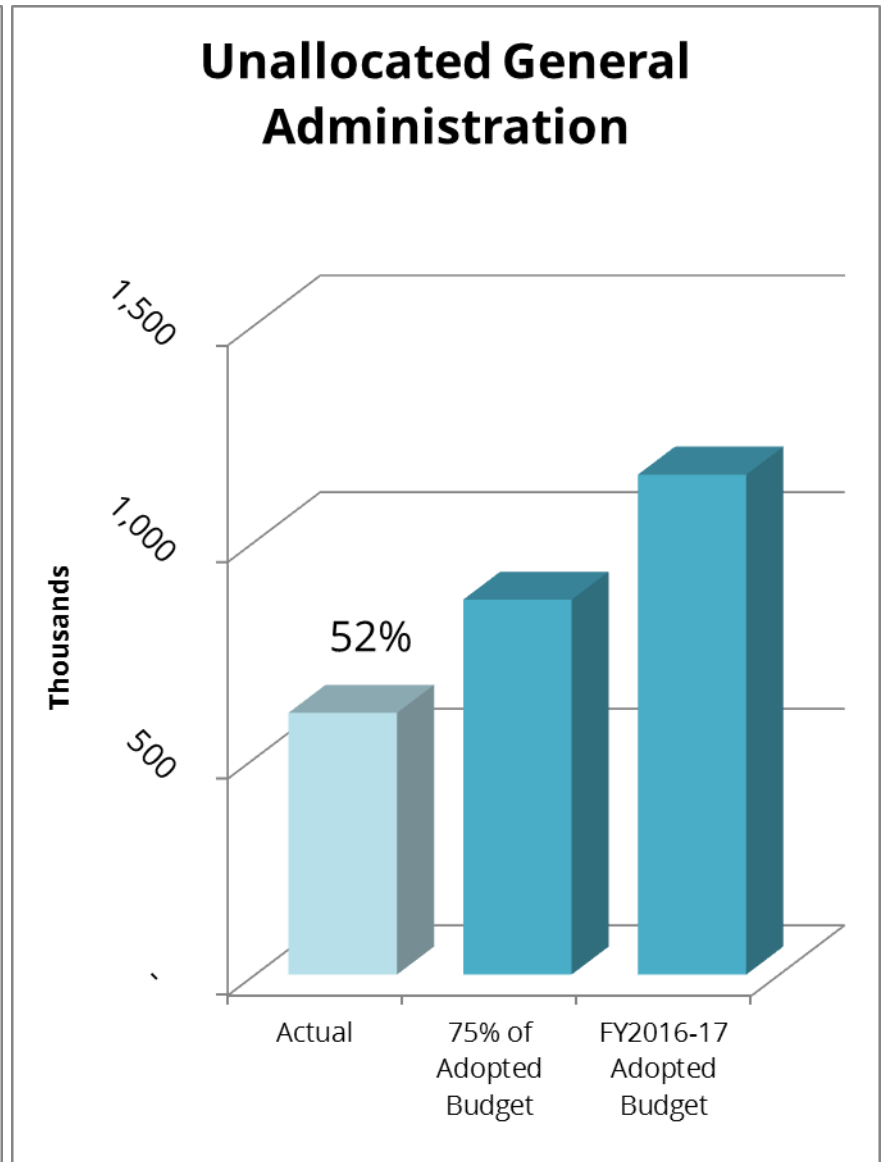
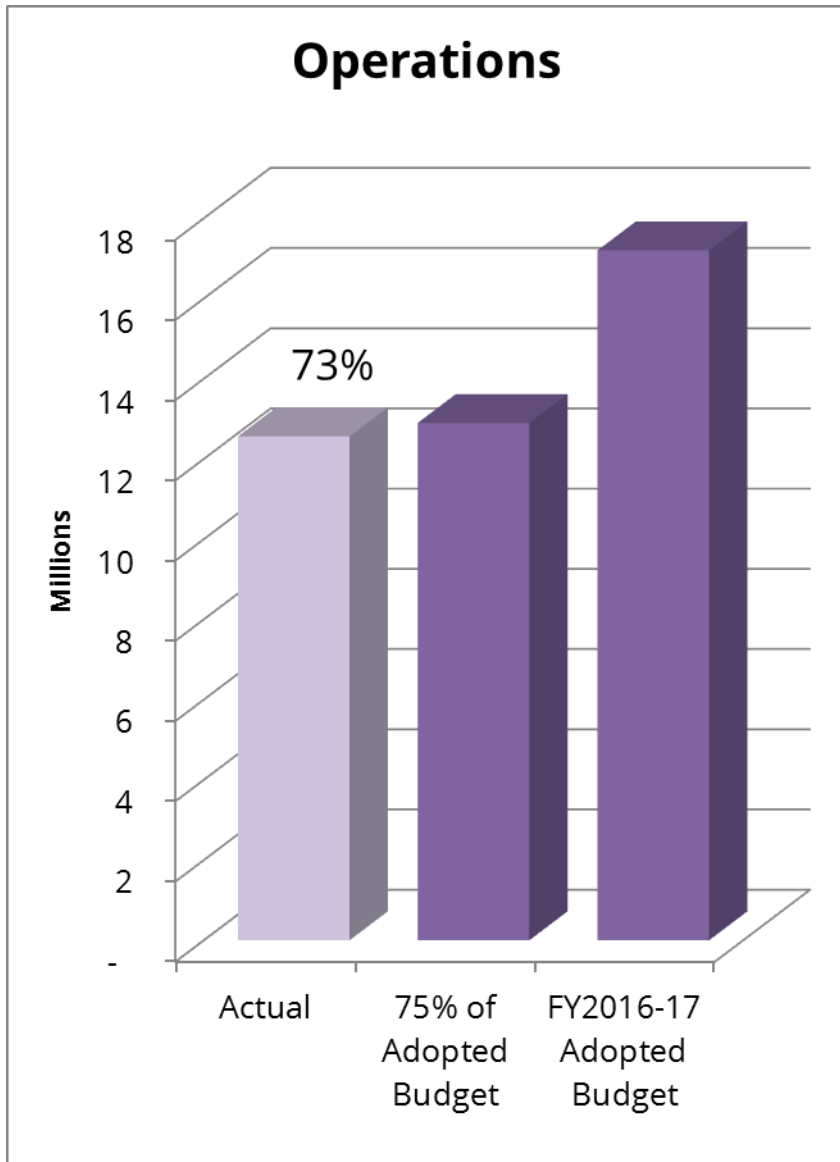
Communication



Transportation Development

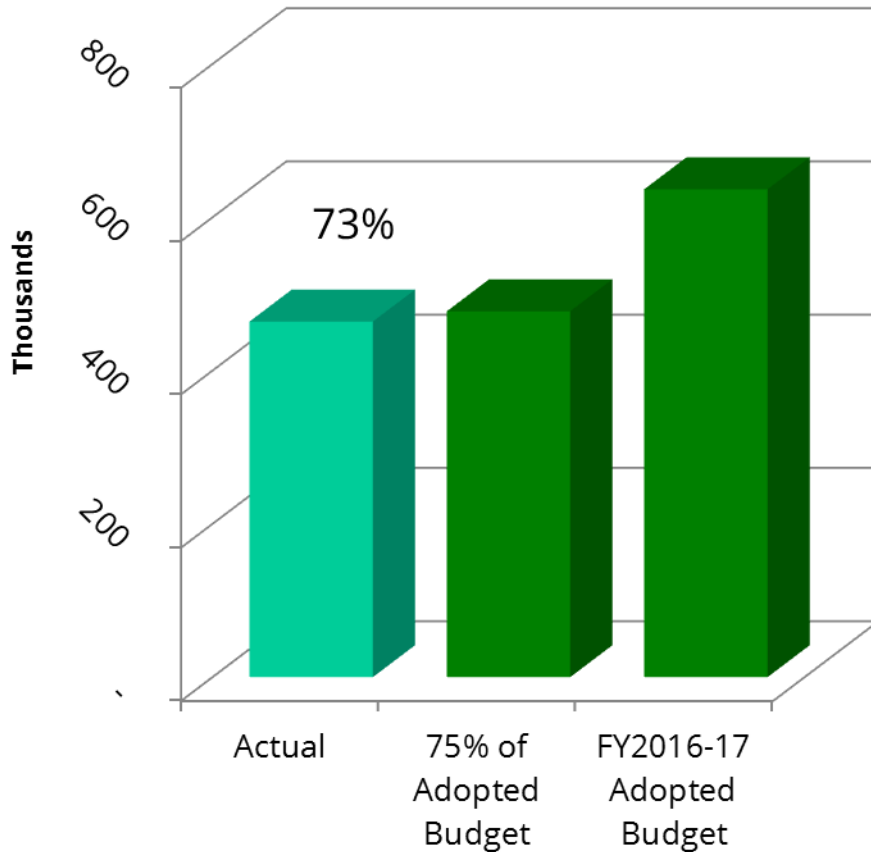


General Fund Budget and Actual on a Non-GAAP Budget Basis (unaudited)

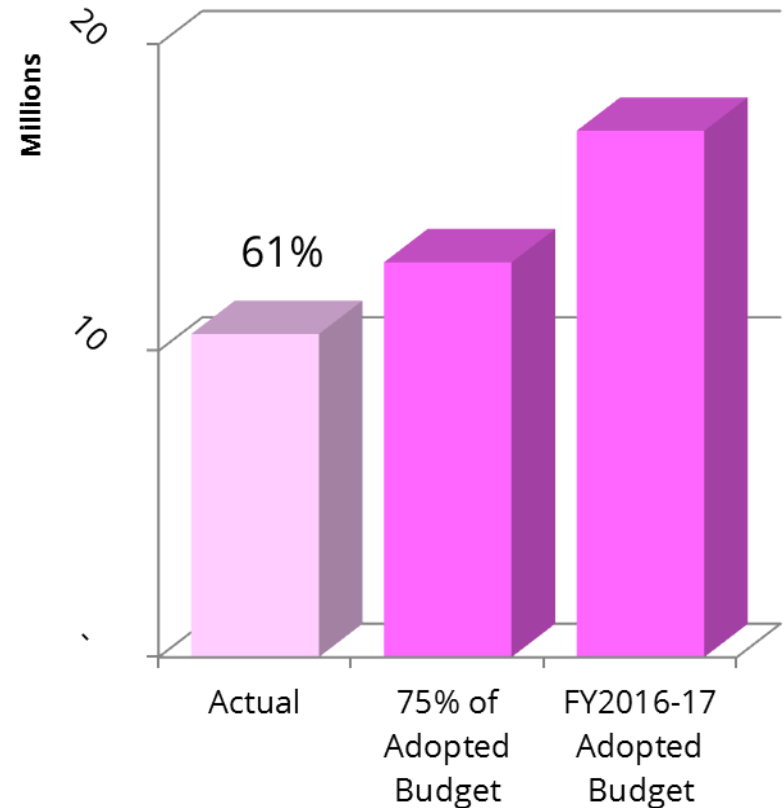


Transportation Programs Fund Budget and Actual on a Non-GAAP Budget Basis (unaudited)

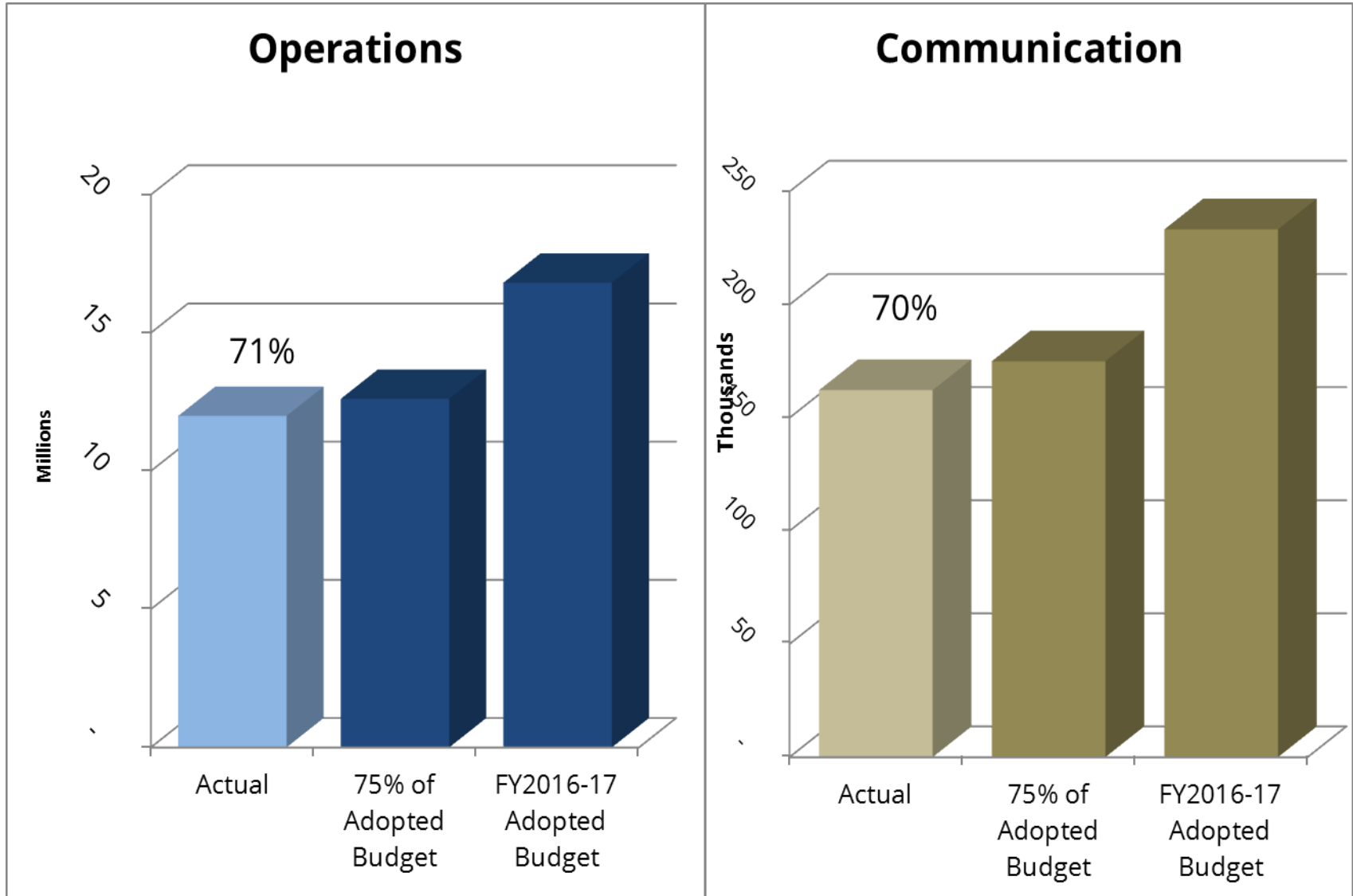
Transportation Development



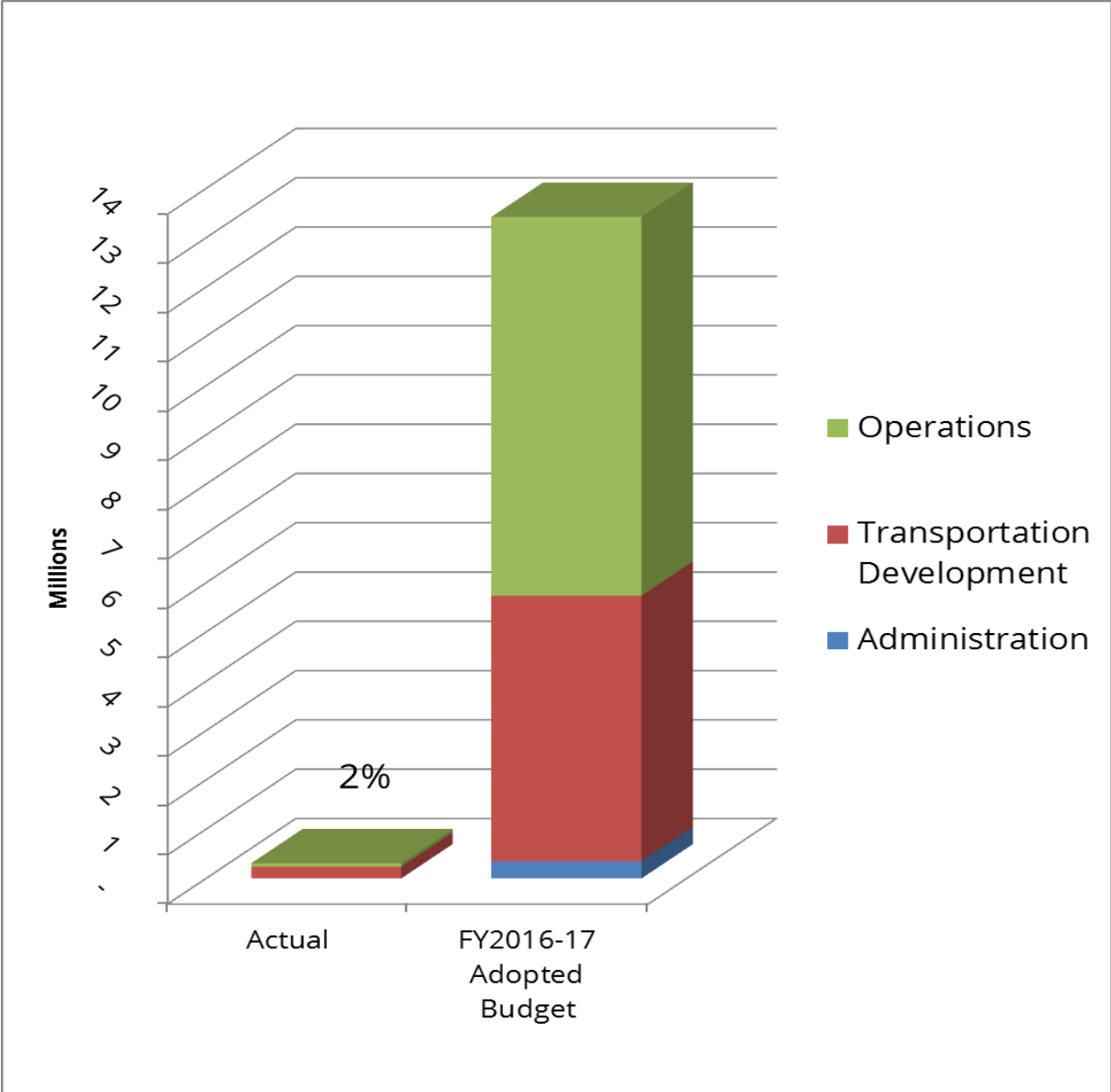
Operating Revenues/Resources Total



Transportation Programs Fund Budget and Actual on a Non-GAAP Budget Basis (unaudited)



Capital Fund Budget and Actual on a Non-GAAP Budget Basis (unaudited)





**Questions about the Third
Quarter Financial Report?**

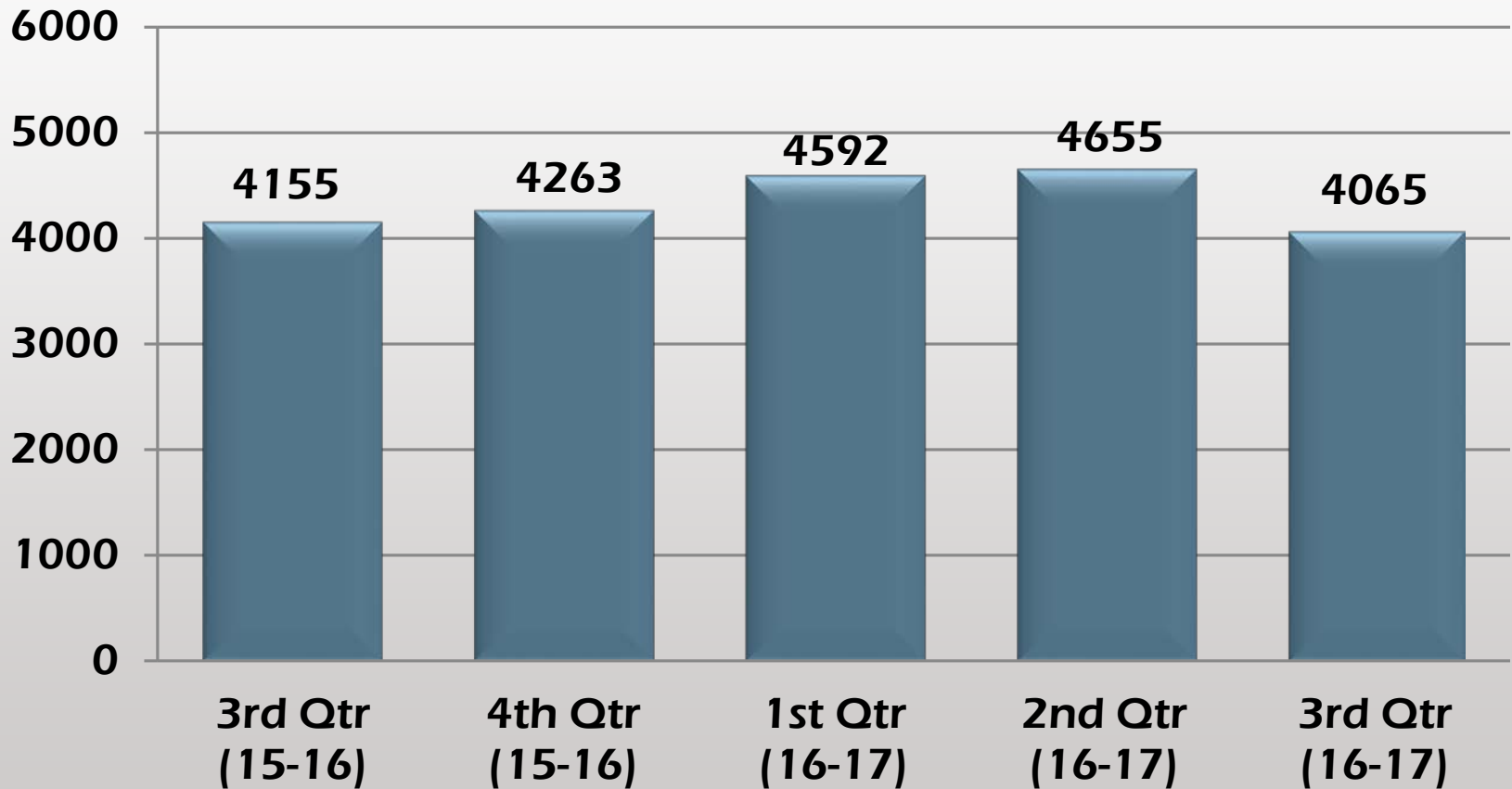


**Third Quarter Report
2016 - 2017**

Total Users



Drive less. Connect.
Matching people with places.

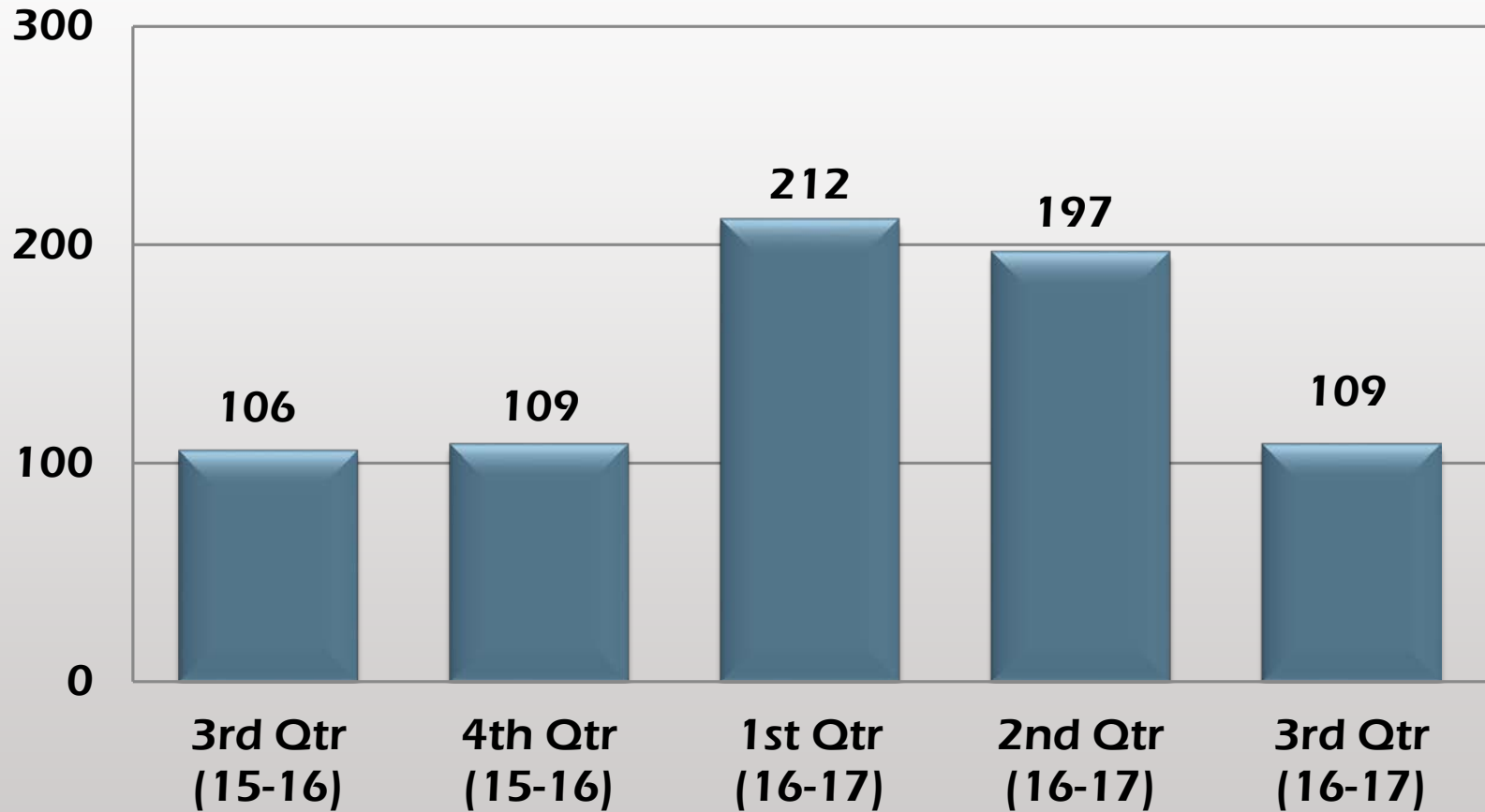


By Quarter

New Users



Drive less. Connect.
Matching people with places.

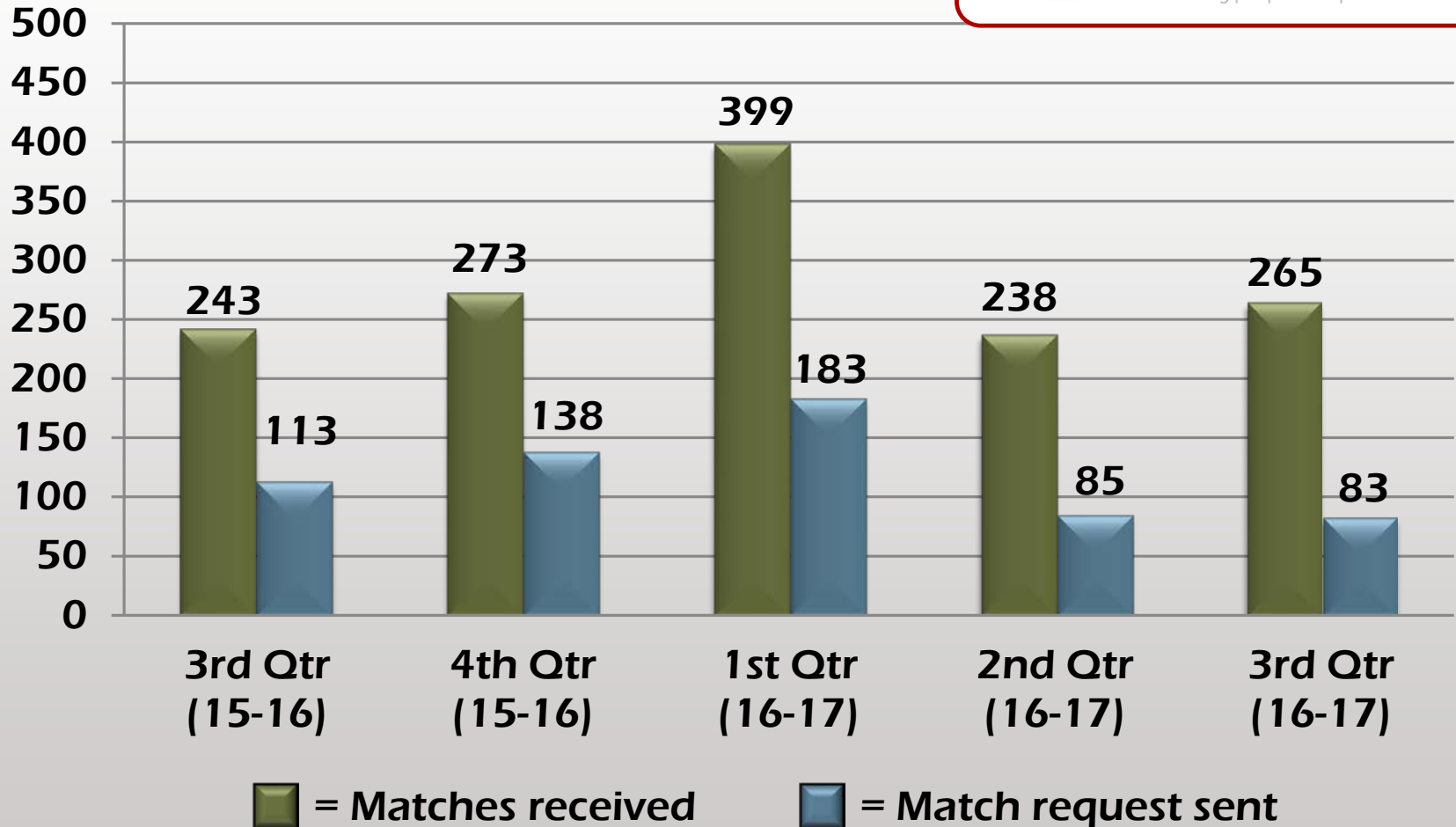


By Quarter

Match Results



Drive less. Connect.
Matching people with places.



By Quarter

Market Analysis

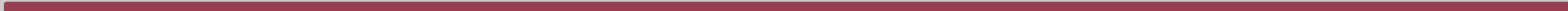
Large geographic area

- Outreach Strategy to address:
 - Business
 - Communities
 - Educational Institutions
 - Individuals
-

Trip Choice Work Plan

Marketing

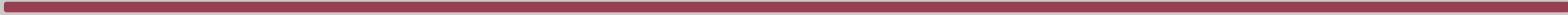
- Creating new literature
- One-Stop-Shop web site



Trip Choice Work Plan

Outreach

- Newsletter
- Community activities
- Work with our ETC's
- Student poster contest



Trip Choice Work Plan

Projects/Initiatives

- Surveys
- Outreach to new populations
- ODOT initiatives
- Safety Campaign



Trip Choice Work Plan

Resources/Administrative

- **Performance Measures**
 - **Continue Partnerships**
 - **Trip Choice steering committee**
-

Thank You

FY17 Q3 Performance Report

January-March 2017

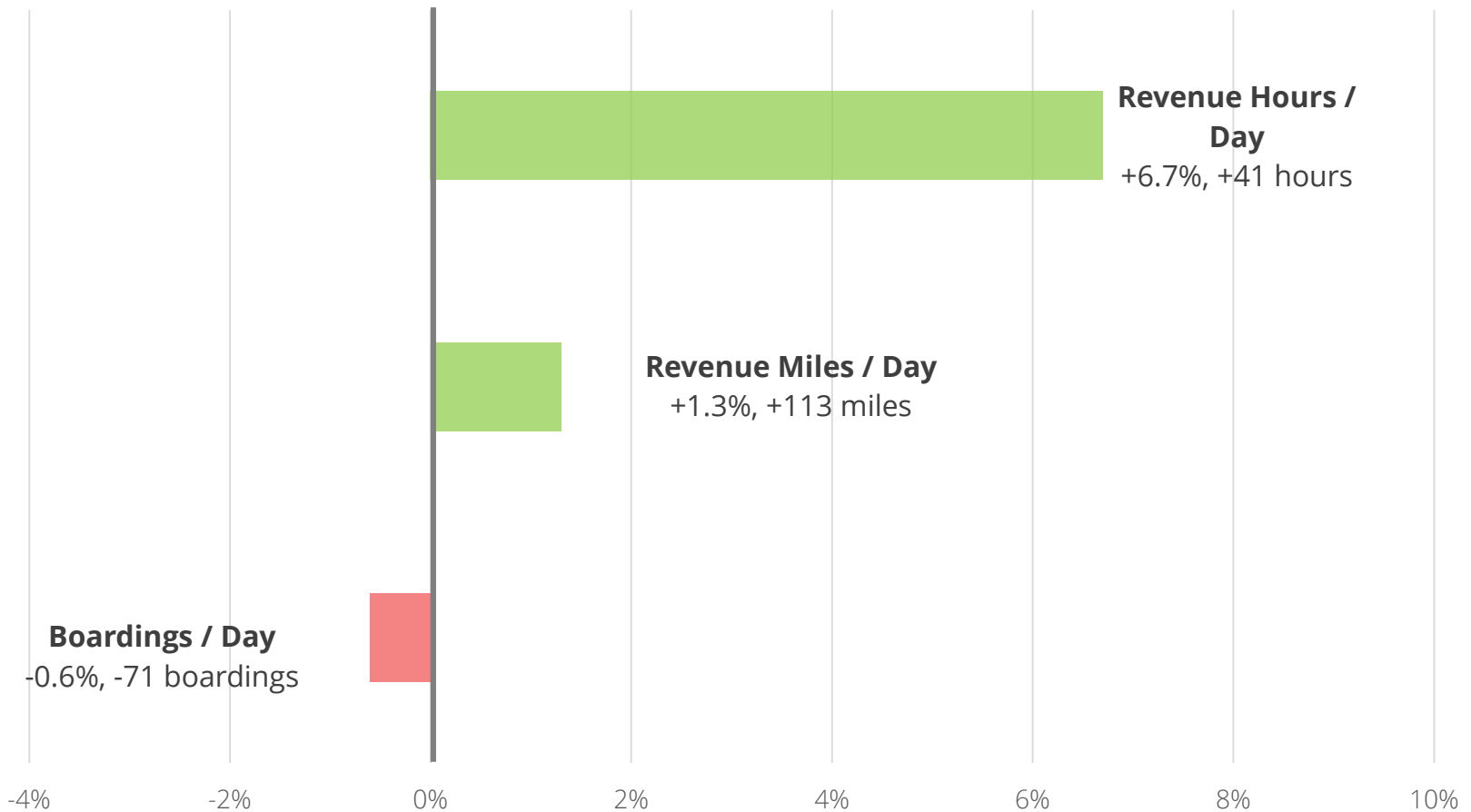


Changes by Service

FY16 to FY17

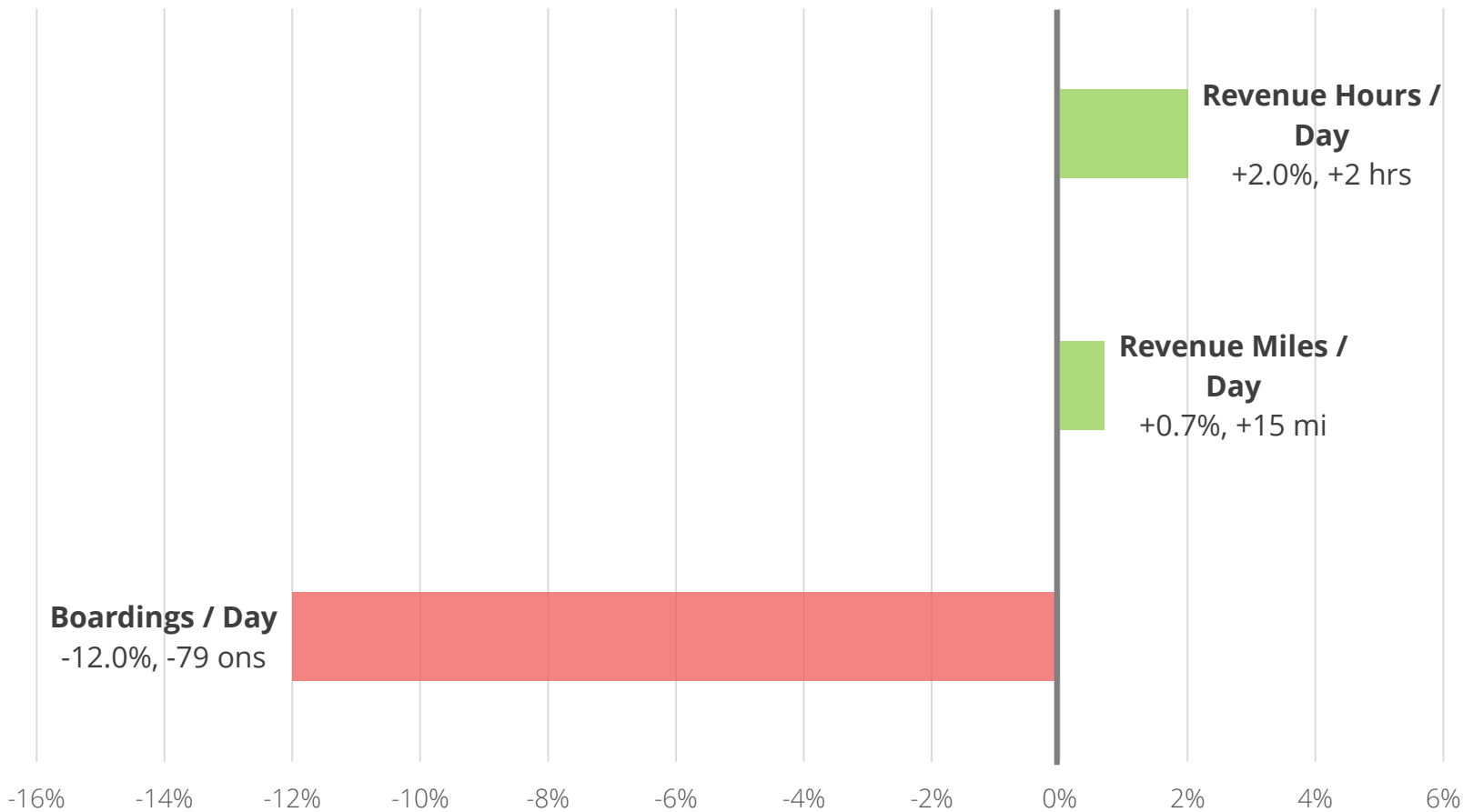
Cherriots Local

Change Between FY16 and FY17



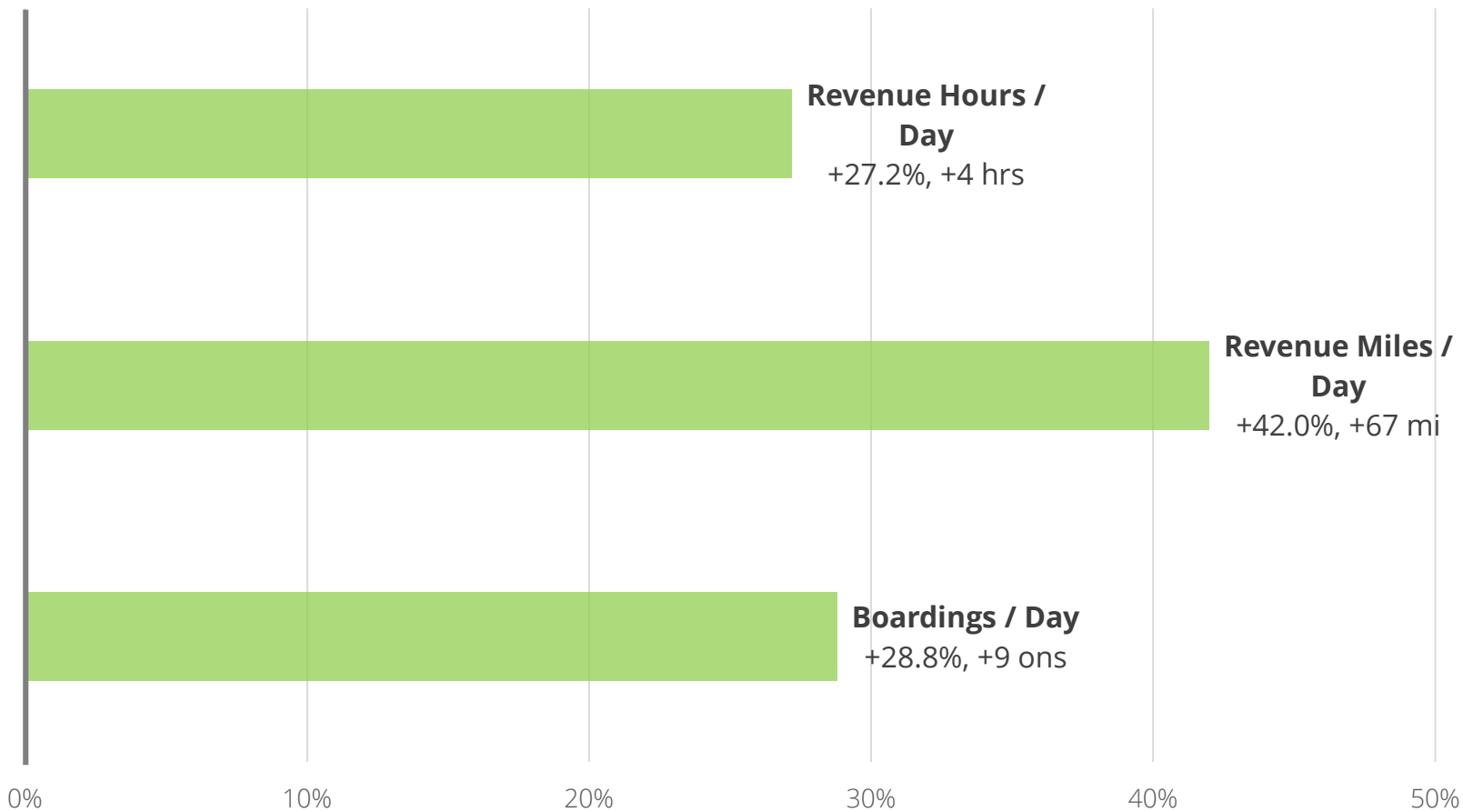
Cherriots Regional

Change Between FY16 and FY17



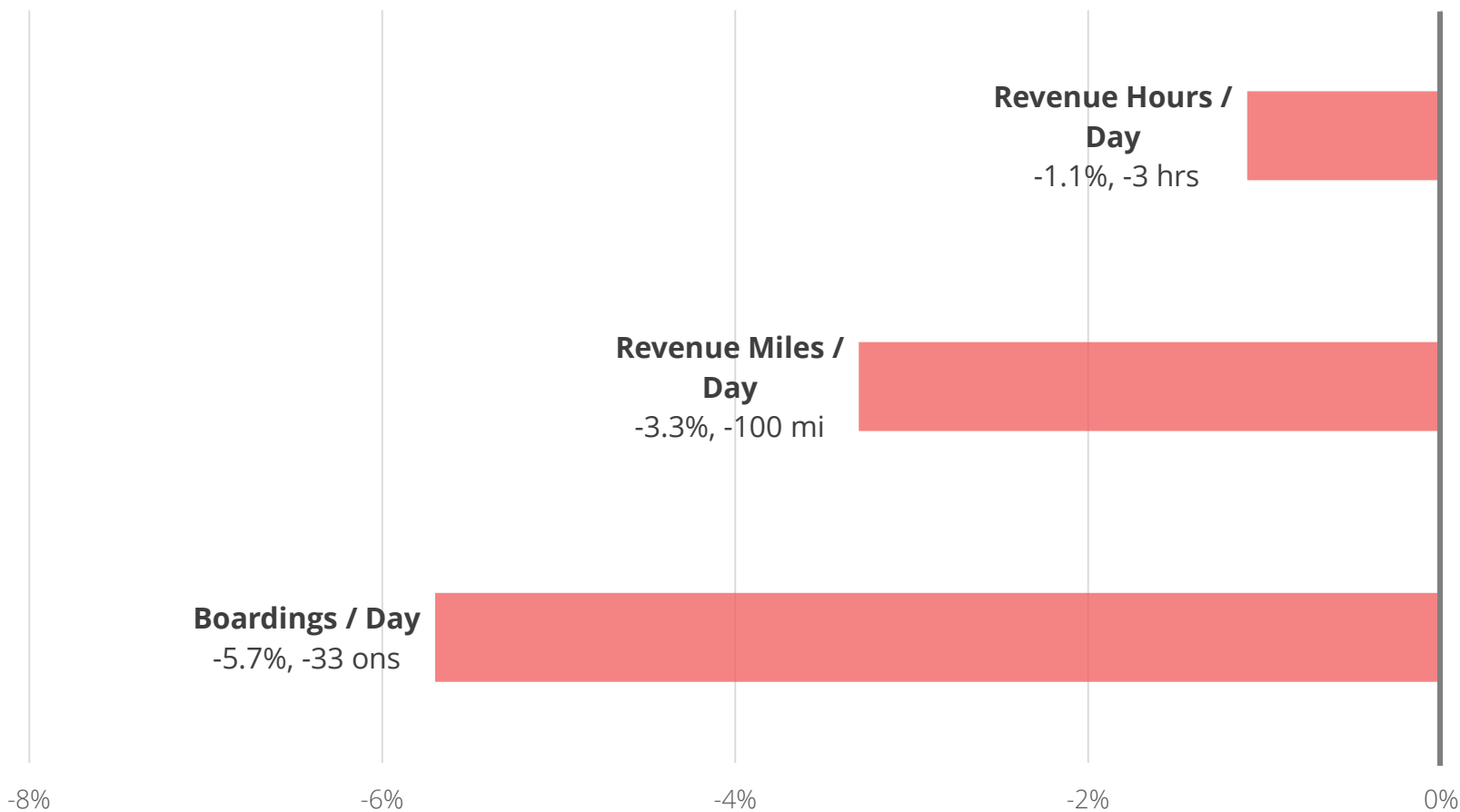
RED Line

Change Between FY16 and FY17



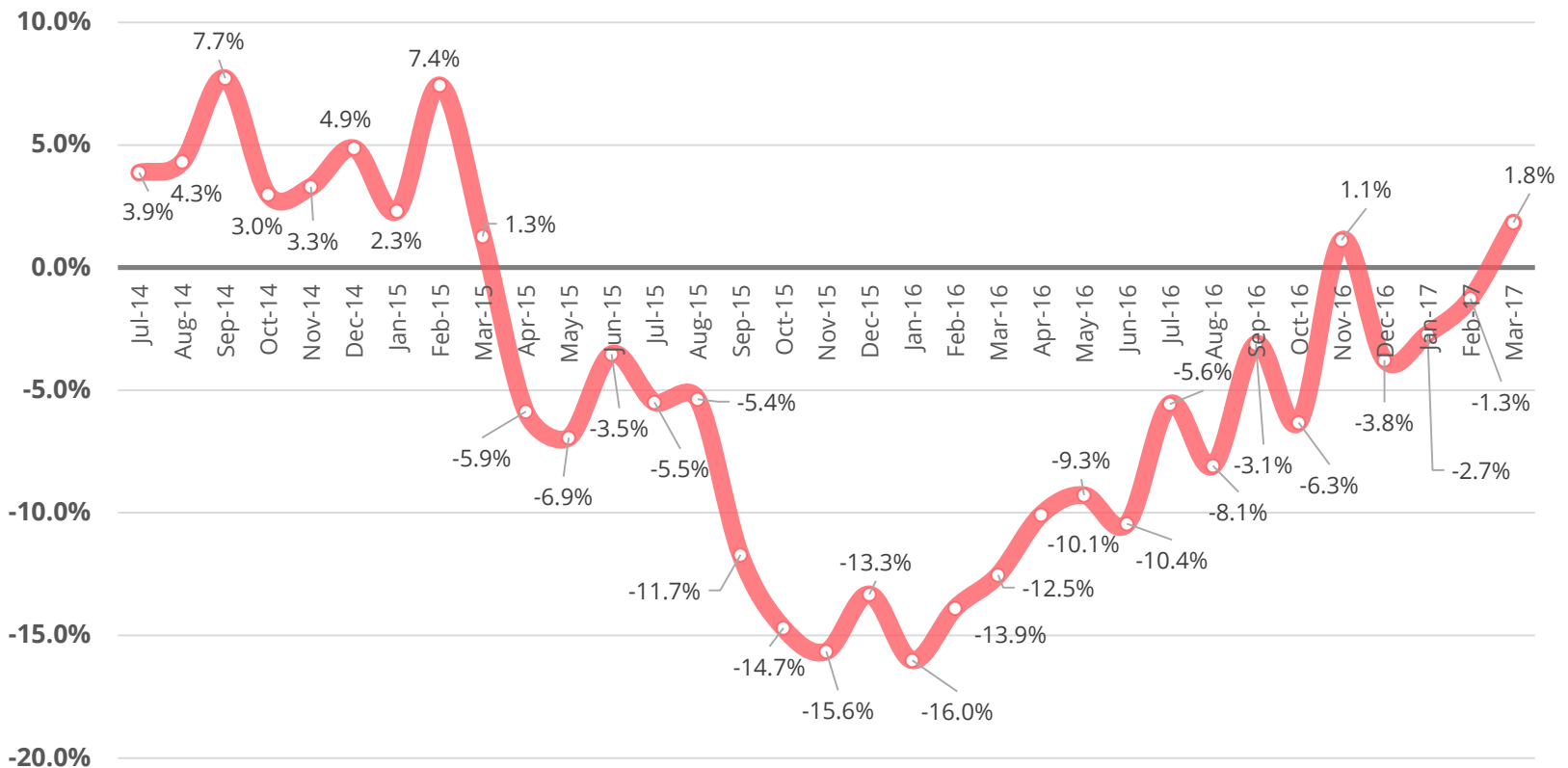
CherryLift

Change Between FY16 and FY17



Cherriots Local Avg Daily Boardings by Month

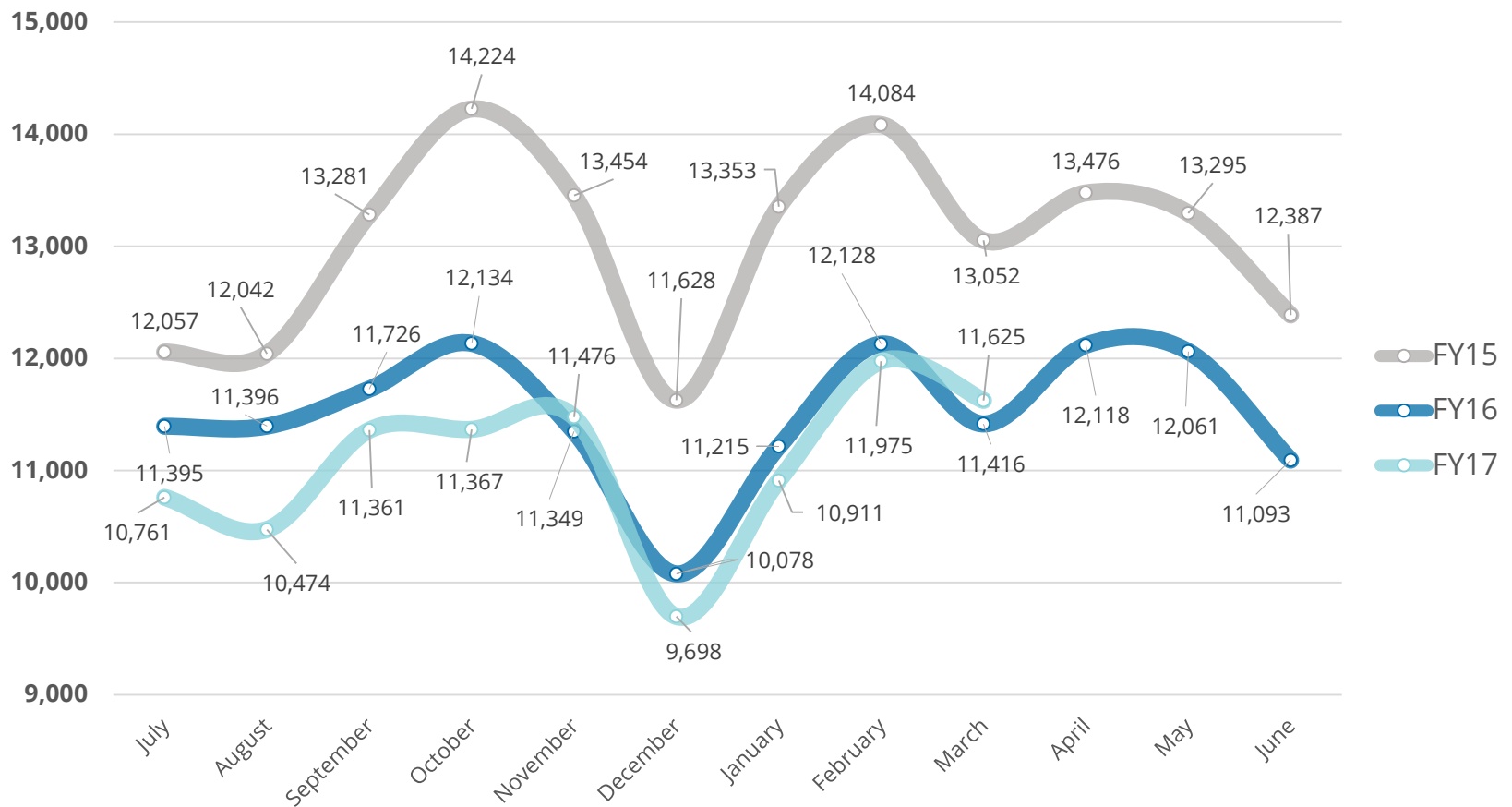
Percent Change Year Over Year*



* Only includes local fixed-route

Cherriots Local Avg Daily Boardings *by Month*

Comparing FY15, FY16, and FY17*



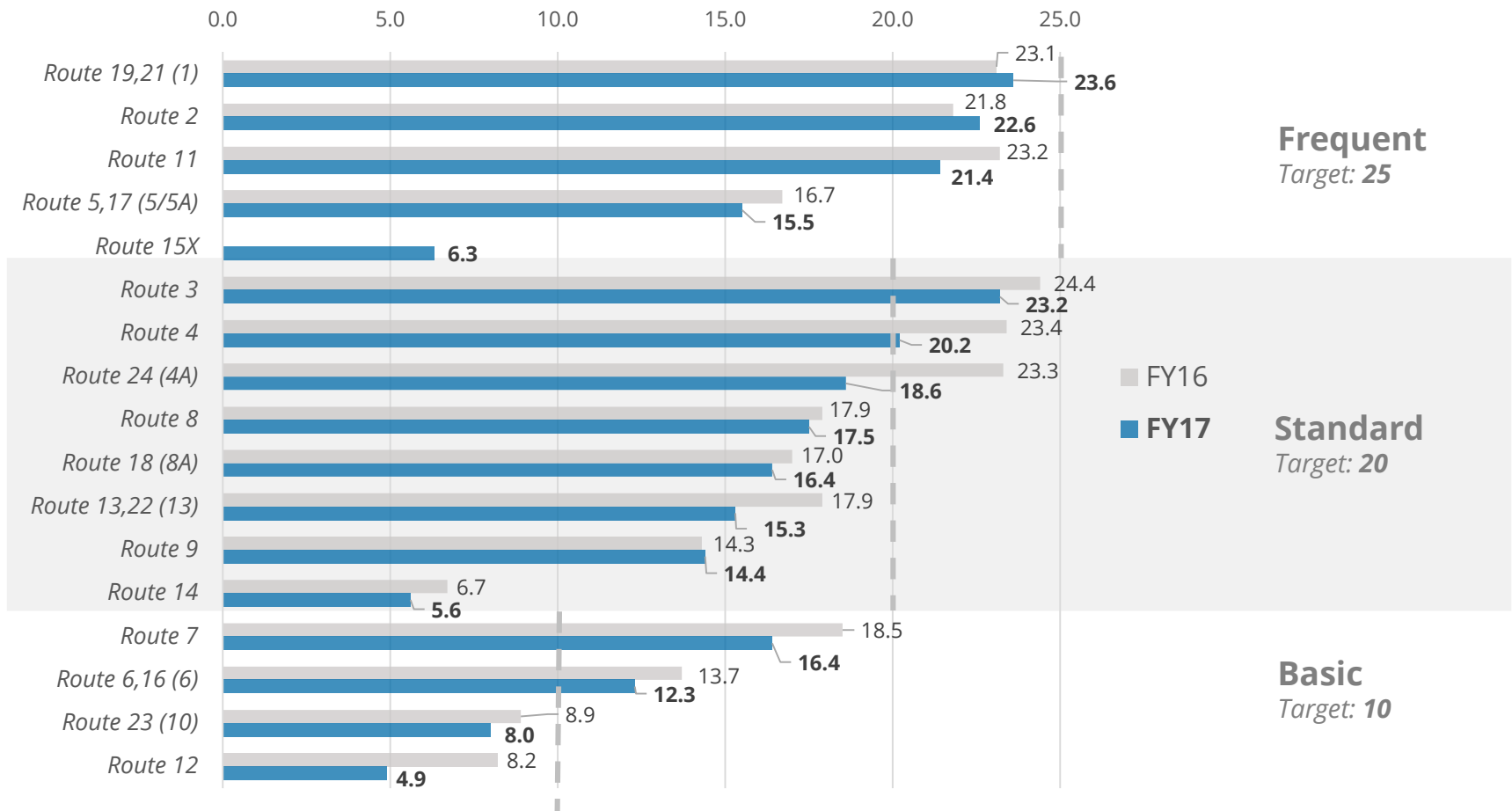
* Only includes local fixed-route

Changes by Route

FY16 to FY17

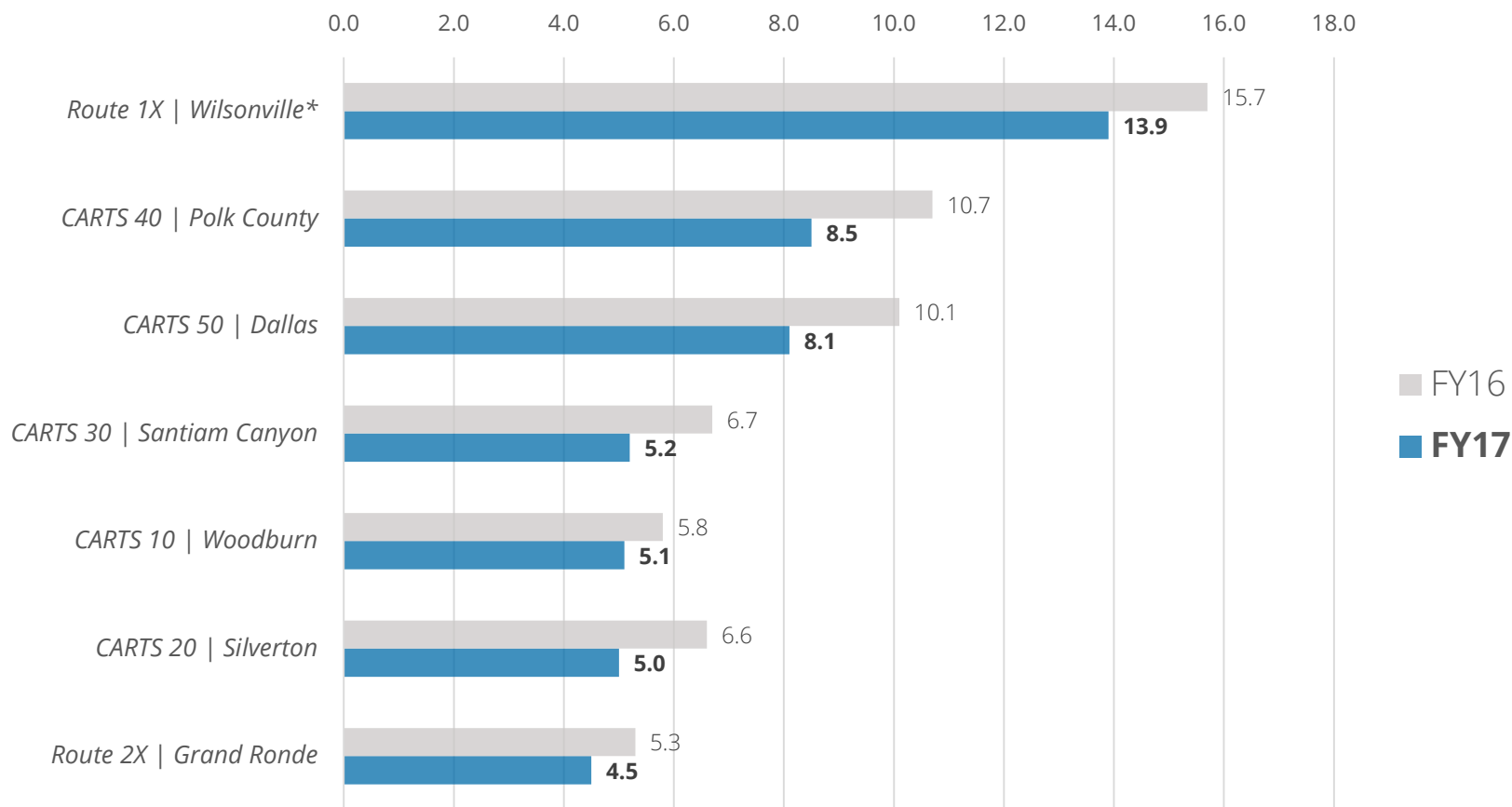
Boardings Per Revenue Hour *by Route*

Local Fixed Routes



Boardings Per Revenue Hour *by Route*

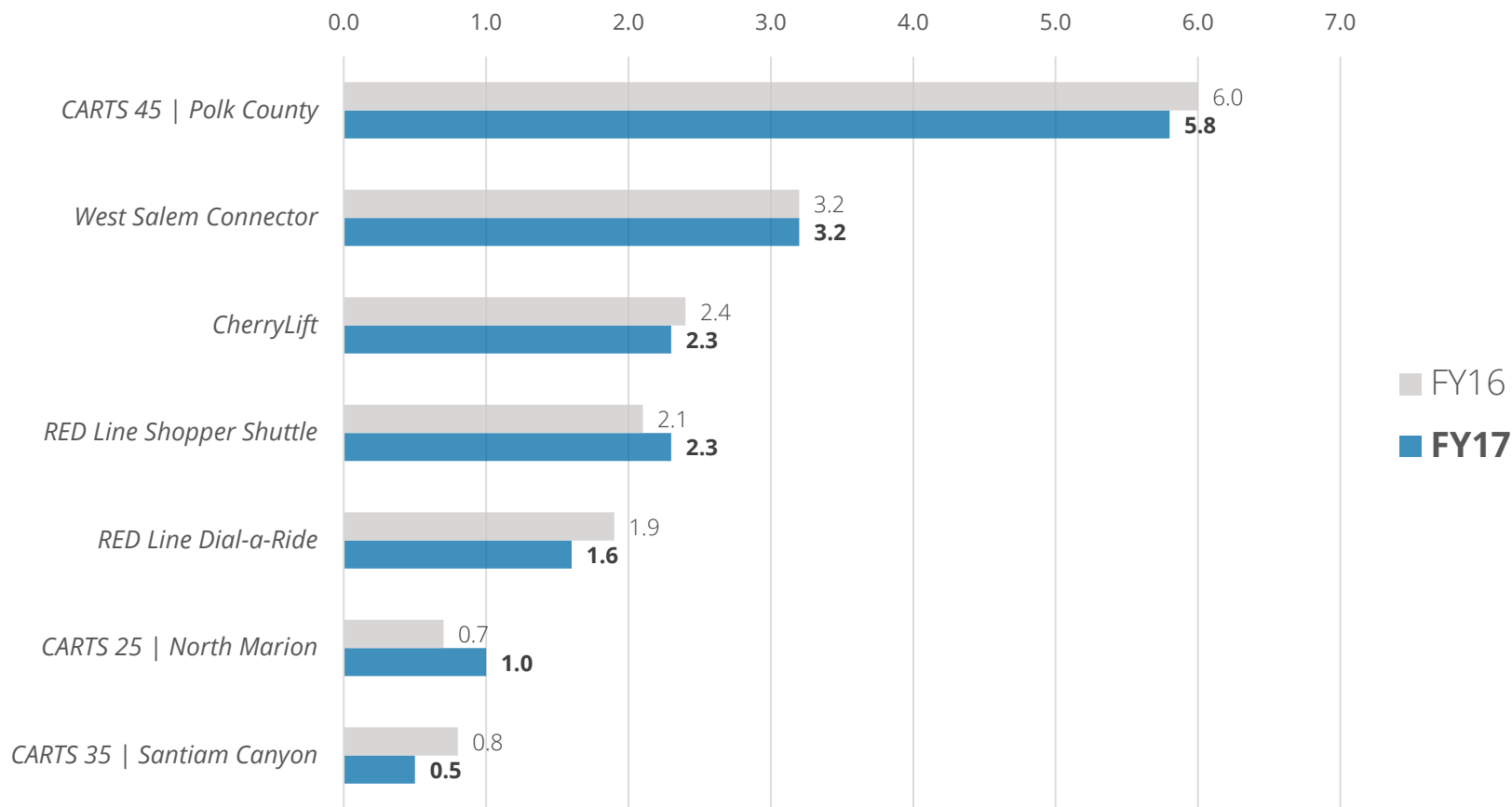
Intercity Routes



* Excludes SMART trips

Boardings Per Revenue Hour *by Route*

Demand-Responsive

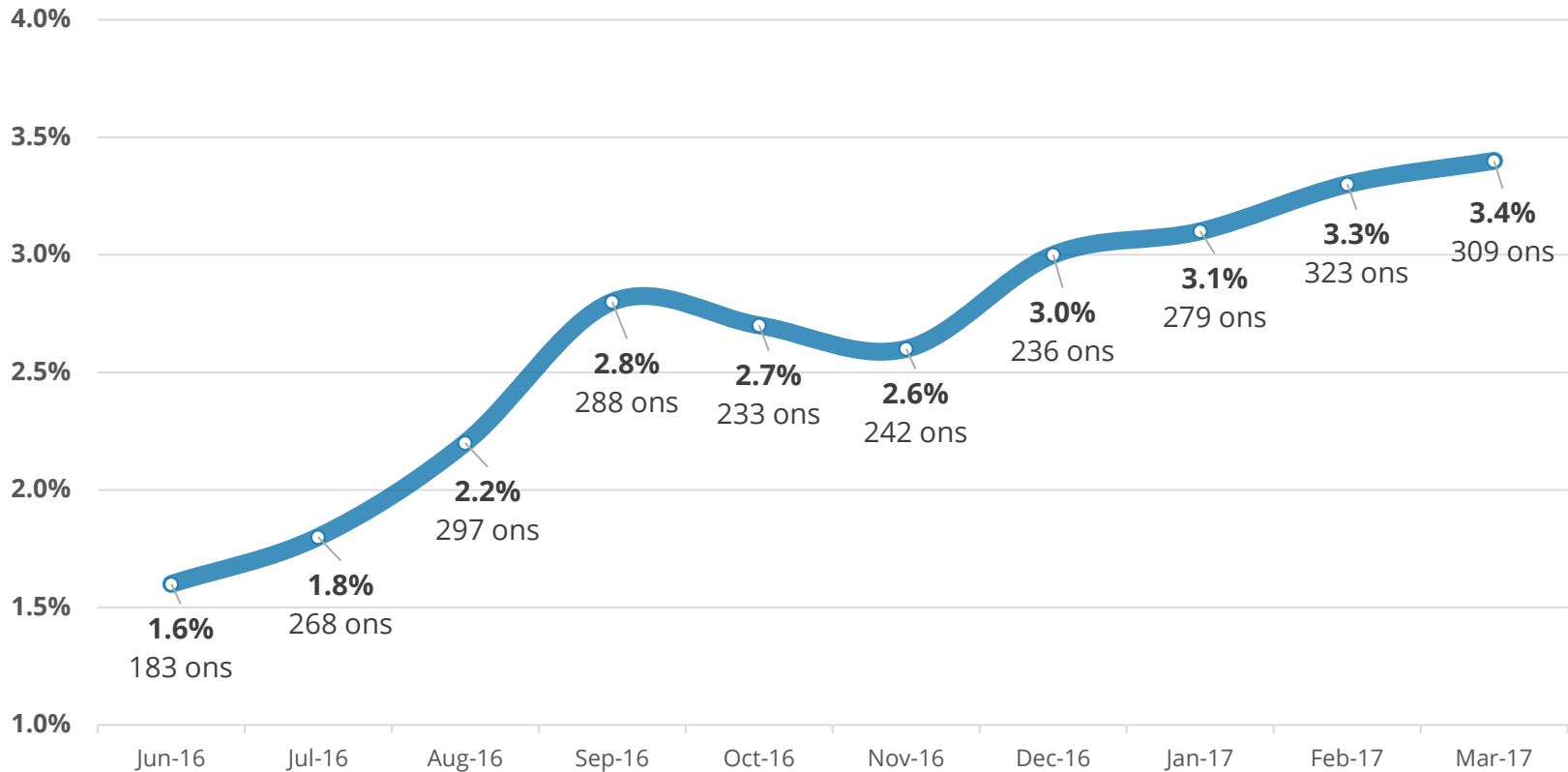


State Bus Pass Program and Route 15X

June 2016-March 2017

Percent of Overall Boardings *by Month**

State Bus Pass Program



* Only valid on local fixed-route, Route 1X, and the West Salem Connector

Route 15X Airport Road Park & Ride Express Boardings Per Revenue Hour *by Month*

